PROFESSIONAL DEVELOPMENT AND BEYOND: A PARTICIPATIVE STUDY OF A SELF-FACILITATED LEARNING GROUP

by

HELEN GOODALL

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AUTHOR'S DECLARATION

At no time during the registration for the degree of Professional Doctorate in Education has the author been registered for any other University award without prior agreement of the Graduate Committee.

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Author: Helen Goodall

Abstract

This is a participative case study of a self-facilitating, collaborative, women's learning group. The group's longevity afforded a unique opportunity to investigate, in depth, both what encouraged its members to join at its outset, and what has sustained the participation of its current members for thirteen years. Its longevity also provided an opportunity to explore the impact of sustained membership on the women in the group. These two components of the study are its most significant original contributions to the existing literature which does not appear to cover anything similar.

The initial raison d'être of the group was its members' professional development and this forms a central strand of the investigation, along with identity and self-facilitation.

A pragmatic research paradigm, the collaborative nature of the group and the writer's dual role as both participant and researcher were all influential in the decision to use a participative approach. A range of methods, chosen by the participants, was utilised during the investigation which, whilst participatory, is not emancipatory research. This experimental divergence from how a participative approach is traditionally employed is offered for consideration by researchers who wish to work in a new way that minimises power in other, non-emancipatory situations.

The findings support, contradict and add to the literature. The mutuality of longevity and the depth of discourse and learning experienced by group members is a particularly striking aspect of this study. As members of the group have aged, its focus has segued from professional development to encompass a much broader agenda: it has shifted from contributing to members' professional identity to sustaining their perceptions of self as women who remain capable of complex, critical thinking as they move out of full-time work. The longevity of the group has also fostered deep attachments between group members, despite the differences
between them: sustained membership of the group, in turn, provides sustenance for its members.

The significance of grounding, ground rules and group composition are highlighted, as is the need to contemplate how members will leave a group during its formation. Alignment between participants in a group is identified as important for its continuation but not always possible.

This research makes no claim to offer a definitive model for collaborative learning groups but, instead poses a series of questions for consideration by others who are interested in collaborative learning.
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This research would not have been possible without the wholehearted commitment of the Group’s members – Annie, Joyce, Patti, Sheila, Sue K and Sue M. Their unflagging enthusiasm has not surprised me but still feels like a precious gift.

My supervisors, Dr Nick Pratt and Dr Julie Anderson have questioned, challenged and encouraged me throughout. Their insights have been invaluable and I have always left our meetings with increased clarity and a renewed sense of purpose.

During the past four years I have received a tremendous amount of support from many friends and colleagues for which I am grateful. Special thanks are due to Chris Bryan and Finn Clarke and to my fellow doctoral students, Karen Wickett and Louise Webber. Finally, the support received from my husband, Dr Tony Walne, and my daughter, Shona Walne, has been particularly unfailing. They have patiently endured my absences, both literal and otherwise, and kept the coffee coming when I most needed it - I can’t thank them both enough.
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Glossary of Terms

This glossary represents my own interpretation of the terms listed below and the reader is invited to bear this in mind throughout this thesis. At times this may vary from interpretations found elsewhere and those terms that are particularly central to the study are further developed at appropriate points within Chapters 2 and 3. On occasions, I have used the words of others who offer succinct descriptions or definitions to clarify the intended meaning of a term and these are acknowledged appropriately below.

Agency: ‘the ability to exert control over and give direction to one’s life’, (Biesta and Tedder, 2007:134).

‘Check-ins’: a process used by the Group at the start of its meetings during which each member brings other members up to date with what they see as significant events in their lives since the Group’s last meeting.

‘Check-out’: a process used by the Group during which each member shares their reflections of a meeting.

Collaborative learning group: a group that engages in learning activities, during which mutuality and equity are assumed and there is a declared intention to value the contributions of each member of the group.

Collaborative inquiry group: a group that operates in the same way as a collaborative learning group but with the specific intention of undertaking inquiries or research activity of some description.


Democratic: a term used throughout this thesis to infer equality and egalitarian participation or membership, rather than elective practices or the representation of a majority viewpoint.
Discourse: ‘the process in which we have an active dialogue with others to better understand the meaning of an experience’, (Mezirow, 2000:14).

Discursive: deriving from the same origins as discourse, discursive writing aims to discuss and put forward a view that is well-reasoned and well-argued.

Efficacy: effectiveness [of something in achieving a particular goal].

Findings: what the research tells us. In the case of this study, I would suggest that nothing has been ‘found’ but, instead, the participants have constructed a number of data sets through an iterative process. These constructions represent the ‘findings’ in this thesis.

Generalisability: the degree to which a study’s findings can be considered representative, applicable or transferable to an entire population or other cases.

Grounding: the augmentation of mutual understanding (including the development of agreed ground rules) to optimise the likelihood of a group working well.


Identity work: ways in which people are ‘engaged in forming, repairing, maintaining, strengthening or revising the constructions that are productive of a sense of coherence and distinctiveness’ (Sveningsson and Alvesson, 2003:1165). This embraces both the internal shaping of self (how we see ourselves) and the external self (how we see ourselves reflected in the eyes of others).

Informal learning: any learning, intentional or otherwise, that takes place during life outside educational institutions or non-formal settings.

Making meaning: the generation or construction of understanding [of a thing, idea or concept], (Schwartz, 1999).
Motivation: the intention to learn, influenced by beliefs and values constructed through an individual’s prior experiences. The learner may or may not be aware of their own intent, (Segers and van der Haar, 2011).

Non-formal learning: organised learning which takes place outside educational institutions.

Participative [Research]: (synonym: participatory) research in which the ‘subjects’, ‘respondents’ or ‘participants’ are co-researchers. (See section 1.12 and Chapter 3 for more detailed accounts.) The two terms appear to be used interchangeably in the literature and participative rather than participatory is generally employed herein.

Practical knowing: knowing how to do something, demonstrated through skills or competences.

Practice: a way of doing things, (Eckert and Wenger, 2005).

Professional: associated with one’s employment or career (no attempt will be made during this thesis to enter the debate about which careers comprise ‘the professions’).

Professional Development: (synonym: professional learning) learning that informs or is associated with professional practice.

Professional Practice: doing things in a professional capacity.

Projection: the unconscious attribution of one’s own issues to someone else or something else.

Propositional knowing: conceptual knowing; knowledge by and through description of something; expressed through statements and theories.
Reflexivity: a deep form of reflective analysis that takes into consideration the socio-cultural origins of our thinking.

Self-directed learning: the learner decides (whether consciously or not) what direction their learning will take.

Self-facilitated learning: learning that takes place without input from an educator or any figure of authority (synonym: self-managed).

Social capital: social connections and networks that are seen or believed to be of value. NB. It is acknowledged that this is a practical interpretation that does not articulate the differing emphasis placed upon the phrase by Bourdieu, Coleman and Putman, its three main thinkers (Smith, 2009).

Sustainable: an adjective used to infer that [something] can be maintained and is viable.

Theory – a way of seeing and contemplation, derived from the Greek noun ‘theoria’, (Kellner, 2003).

Training: learning that is intended to develop specific skills.

Transformational/transformative learning (synonyms): learning that leads to change: usually implying significant rather than minor change. These terms are used interchangeably in this thesis.

Work: although this is regularly considered to be what people do for a wage (Sawchuk, 2008), throughout this thesis it also implies the effort that might be expended to achieve a goal of some description.
Preface

(A ‘fly-on-the-wall’ preview of a collaborative learning group)

It is 10 o’clock on a Saturday morning in the middle of October. A group of women occupy the sitting room of a family house in Twickenham (or Shropshire, or Devon, or North Wales,). There are seven of them, varying in age from mid-fifties to early seventies. They are standing in a circle and singing what sounds like an African song, though only the leader of the singing has any idea what the lyrics mean. The confidence of the leader infects the other singers as she moves between them, helping them with their own parts in the round. The sound is strong and melodic and rises to a crescendo before the leader brings the round to an end. The women cheer and move to sit in the armchairs and sofas in the room, making themselves comfortable in positions that allow them to see each other. Another woman, the ‘chair’ for the weekend, thanks the leader of the singing for getting the group warmed up and draws everyone’s attention to a sheet of flipchart paper that is stuck to the back of the door. The paper has ‘agenda’ written at the top of it and is divided into sections for Saturday and Sunday. The group has already spent Friday evening together; one woman arrived with supper for everyone. After eating together, time was spent catching up and asking questions of each other about the written ‘check-ins’ (see glossary) circulated before the weekend. They already know what has happened in each other’s lives since they last met in March; they congratulate, commiserate or empathise with each other, depending on the news.

Now, on Saturday morning, according to the agenda it is time to focus on attachment theory. Another member of the group takes the lead in a session that includes sharing information, sharing experience, lively discussion and some reflection about how this relates to the work that some of the women do as facilitators, coaches, teachers and therapists. One woman is particularly concerned about a specific counselling client that she has and the group work with her to explore her options and her own feelings. That the conversation will go no further is taken as a matter of course: confidentiality boundaries were agreed by the group many years ago. Eventually, the session is brought to a close and two of the women leave the room to bring back coffee and homemade cake for everyone.
After a short break the ‘chair’ will get everyone together again for the next session on the agenda, the focus of which will be the use of social media for work purposes. Another woman will be leading that, having recently attended a three day event on the same thing. According to the agenda, still to come today is a walk after lunch and a session on John Berger’s ‘A Fortunate Man’ before dinner; another woman’s name appears on the agenda alongside that topic. ‘Cultural taboos’ are scheduled for tomorrow morning along with something listed as ‘Patti’s options’. Anyone in the group can ask for time during a weekend to work on specific issues or challenges.

The rest of the agenda for Sunday is taken up with planning the next meeting and the ‘check out’, during which the women will reflect on their experience of the weekend together. Next time there will be a different ‘chair’ and different women will take turns to lead sessions, depending on what the group decides to do. After lunch on Sunday the women will go their separate ways to other parts of London, North Wales, Shropshire or Devon, until they meet again in six months time at another of their houses. Meanwhile, some may meet up with those who live close by, emails will be exchanged, telephone calls made: it is not necessary to wait for six months to access the support that membership of the group affords.
Chapter 1  An Introduction to the Research

1.1 The Purpose of the Study – Making Meaning

‘There is an intrinsic drive among all humans to make meaning of their daily lives’, (Taylor, 2008:5).

This drive to make meaning propelled me towards undertaking a Professional Doctorate in Education (EdD) and conducting this research as part of that undertaking. After thirty years of working as a facilitator of professional and personal development for people in a wide range of employment contexts, Malcolm et al’s assertion that ‘learning is a central activity of professionals’ (Malcolm et al, 2013:1) seems to me to be stating the obvious. Paying attention to my own continuing learning has necessarily been central to my practice, both to reflect on that practice and to keep abreast of new thinking and ideas in the field of professional development. As Meriam (2008) argues, reflection and dialogue in adult learning, either with others or with oneself, ‘enables learning to take place’ when learning is ‘construed as meaning-making or knowledge construction’ (ibid:97). Accepting this premise, this investigation focuses particularly on reflection and dialogue with others as a method of professional development that is both sustainable and sustaining.

Appendix 1 aims to shed some light on my experience and progression as a learner and how these have influenced this inquiry, assuming that ….

‘meanings or beliefs are holistic. We can make sense of someone’s beliefs only by locating them in the wider web of other beliefs that provide the reasons for ... holding them’, (Bevir and Rhodes, 2005:171).

Focusing specifically on professional development undertaken in small, self-facilitated groups for this thesis seems a logical next-step in my drive to make meaning. It is relevant for my comprehension of the professional development needs of those with whom I work as a facilitator, and it is also pertinent to my own reflective practice and continuing development. This investigation is a case study and meaning-making is also central to the group of practitioners on which it focuses. For them, professional development involves integrating the professional and the personal, and making meaning of the practices in which they engage
during their work and interactions with others. In respect of this inquiry, making-meaning also takes into account the assertion that ....

‘who we become as .... actors in the world is invariably affected by the quality of the world in which we are formed’, (Parks-Daloz, 2000:105),

and also that ....

‘.... so many theorists take mature, independent thinkers as the subjects of their theories without any mention of how they got that way’, (Belenky and Stanton, 2000:73).

The intention here is not just to make meaning of my own daily life and practice or that of the inquiry's subjects and ‘how they got that way' (ibid). This thesis simultaneously attempts to offer options for making meaning that others with an interest in collaborative professional development might consider.

Also relevant to meaning-making, Smith and Hodkinson (2002) note that the debate about who educational researchers are and what they should do as researchers has been continuous and persistent for at least forty years and conclude that ....

‘Arguments on all sides .... are very important for how we understand educational inquiry and understand ourselves as educational inquirers’, (ibid:295).

Entering into this debate and developing understanding of these issues is central to this study, especially given my decision to adopt the dual roles of researcher and subject (to be revisited shortly). This represents an additional aspect of meaning-making – what it means or can mean to be a researcher and undertake research in the field of education and learning. These points are discussed in the section on participative methodology later in this chapter and in more detail in Chapter 3.

The rest of this introductory chapter aims to elucidate the concept of a self-facilitated, small group approach to professional development and the associated questions and themes explored through this investigation. The purpose, legitimacy and originality of the study are discussed, its philosophical foundations outlined, and gaps in the existing literature identified. The reader is signposted to further
chapters where each of these areas are expanded and developed, and the final section offers an explanation of the writing style and approach to writing adopted for this thesis.

1.2 An Alternative Approach to Professional Development?

Wenger (1998:225) argues that ‘learning cannot be designed’. Given that it follows the negotiation of meaning through experience and practice, it happens anyway, ‘design or no design’ (ibid). However, he also points out that ‘there are few more urgent tasks than to design social infrastructures that foster learning’ (ibid). There is a significant problem in this respect at both organisational and government levels of policy making where complexities seldom appear to be acknowledged and problems are treated as well-defined and straightforward to solve (Eraut, 2004). The corresponding susceptibility to accept formalised and standardised types of adult training and learning and adopt a one-size-fits-all approach both appears to be unsupported in the literature and seems to fly in the face of common sense. Billet (2011) argues that, for learners in the workplace, an alignment between their own interests and what is on offer by way of learning activities is instrumental in respect of their engagement with and the quality of the learning.

Since the 1990s, the increasing centrality of globalisation, competitiveness in international markets and new technologies within business and workplace practices has resulted in a corresponding increase in the pressure to invest in educating and training professionals (Pillay et al, 2006). Yet during times of economic downturn such as that experienced in recent years, this type of investment is less forthcoming (CIPD, 2013).

Alongside any financial considerations, Meriam ventures that ....

‘With the growing understanding that adult learning is a multi-dimensional and holistic phenomenon, we are beginning to recognise the value of incorporating more creative modes of inquiry into our practice’, (Merriam, 2008:98).

Although she is referring here to the practice of adult educators in broad terms, it is reasonable to assume that there is a corresponding need for creativity in the
field of professional development, whether instigated by educators, learners or both.

‘In professional work, there are no right answers’ (Gardner, 2007:6) and this study does not claim to offer the way forward for professional development. Nevertheless, it does at least aim to explore a creative option that organisations and individuals can consider which facilitates ongoing, professional development without placing additional pressure on already overstretched budgets.

1.3 The Focus of the Study

This thesis is offered following a participative study to explore the viability and robustness of self-facilitated learning groups as a credible option for sustainable professional development. Through reviewing relevant literature and from generating and analysing primary data, five key questions are addressed, as follows:

1. What encourages, influences and motivates people to engage with and participate in professional learning groups?
2. What sustains this engagement and participation?
3. What is the efficacy of self-directed and self-facilitated groups in achieving ongoing, transformative, professional learning?
4. What are the implications and outcomes for participants as a result of their long-term group membership?
5. If successful learning groups are defined as those in which participants continue to achieve their learning goals, why are some groups successful and others not and what enables “success” to be sustained?

Investigating these questions is an attempt to explore, understand and present a particular approach to professional development that appears to be largely uncharted, thus allowing for originality in this study. The questions posed are addressed through an investigation into the factors that have contributed to the longevity of a specific, self-facilitated, professional development group (hereinafter referred to as “the Group”), of which I am a member. Implicit in the study’s title,
given the mention of professional development, is that it relates to adult learning (rather than learning in childhood,) and an acceptance that ....

‘the more we know about adult learning, the more effective our practice in the classroom, in the workplace, or in our communities’, (Meriam, 2001:1).

The Group is a collaborative learning group (see glossary) comprised of peers that have come together with the specific, shared intention of collaborating in order to learn and make meaning of their collective experiences. According to Dillenbourg (1999), such collaboration is likely to work best when a group's members operate at similar levels, share common goals and are prepared to work together.

The collaborative learning group model of professional development....

‘contrasts with many professional development structures that are based on the presentation of information by experts to participants’, (Stanley, 2011:77).

Within the Group, all members occupy the positions of expert and novice on different occasions, but the point is that overall mutuality and equity are both expected and accepted; there is no leader or expert and yet all group members are leaders and experts. In educational settings, Stanley (2011) points out that the expectation that groups will take responsibility for a collaborative learning task and their own process is not a new concept. There has been a proliferation in the use of collaborative inquiry groups, professional learning communities, communities of practice and collaborative study groups in schools (Holmund-Nelson et al, 2010) and in Higher Education (Lizio and Wilson, 2005). Whilst acknowledging that the benefits of collaborative learning are not to be assumed, Oakley (2004) claims that such benefits ‘have been demonstrated in countless studies’ (ibid:9). Stanley (2011) concurs; commenting on the professional development of teachers, she argues that ....

‘The structure of small learning communities stands in sharp relief to the one-size-fits-all workshop that is so pervasive in professional development practice’, (ibid:71).

In contrast, Janusik and Wolvin (2007) suggest that claims to the effectiveness of learning communities in schools and colleges are largely theoretical with little
empirical evidence to support them. Similarly, a paucity of evidence to support the efficacy of different methods of small group learning in general, and any corresponding interdependency between methods and agency (see glossary) is remarked upon by Schwartz (1998) and Edmunds and Brown (2010). As a model, it appears that collaborative learning is certainly encouraged in the classroom and in community situations but my own foray into the literature on collaborative learning groups confirms that there is limited writing in other fields, particularly that of professional development. This study aims to explore the utilisation and wider utility of collaborative learning groups outside formal, educational settings with particular focus on self-facilitated, collaborative learning as a model for professional development.

In addition to collaborative learning groups, there are numerous other terms in use that refer to various manifestations of similar types of learning group. Those to which the Group bears closest resemblance are collaborative inquiry groups (Yorks and Kasl, 2002) and communities of practice (Wenger, 1998, 2006, 2009). These are both given attention in Chapter 2 where the differences to and similarities with the Group’s purpose, approach and boundaries are discussed. A descriptive account of the Group’s history now follows to enable the reader to position the relevance of other components of this introductory chapter, and indeed, the thesis as a whole.

1.4 The Group’s History

The Group at the centre of this study formed in February, 1997. Originally, there were eight members, all women varying in age from late thirties to mid-fifties, and all engaged in some form of work in the field of staff and/or organisational development as facilitators, trainers, consultants, coaches or therapists. At that time, to a greater or lesser extent the nature of our work entailed engaging with

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1* In line with the participative approach adopted for this study, this historical account of the Group has been viewed and appropriately amended by three other Group members to ensure that is represents a shared account, rather than just my own recollection of events. For the first few years of the Group’s existence, detailed notes were taken at each meeting and circulated to all members. These notes have been used both in the construction of this Group history and the appendices referenced herein.
individuals or groups to assist them in developing their understanding and awareness of their behaviours, their situations, their potential, their options and the strategies that might be employed to take them forward into the future. Given the exploratory and reflective nature of this type of work, it is perhaps not surprising that members of the Group sought to reflect on their own practice, with similar agendas to those employed with clients (such as developing self-awareness and understanding, exploring options, and planning for change).

Some members of the Group worked independently or in partnerships whilst others worked as associates or employees of larger organisations. However, in our work with clients, whether individual clients or groups, all of us predominantly worked alone. Being an independent practitioner can be a somewhat lonely existence and does not always offer the same opportunities for feedback and development that less individually-conducted work might. What all of us sought at the time of coming together was a forum in which we could undertake activities that would progress our practice and our professional and personal development. Participating in a discursive learning group with peers engaged in similar work presented a valuable opportunity to learn, share and network (Maher et al, 2008) that, at that time, was unavailable to any of us elsewhere.

Of course, learning groups do not materialise without some initiating activity that brings people together. Before the Group formed, one member had spoken independently with several other women about their potential interest in establishing a professional learning group. Following strong expressions of interest and a declared mutual preference for a female-only group, a number of other potential members were identified and contacted by the initiator. All were keen to participate and agreed that the first meeting would be used to clarify the purpose of the Group and our expectations as members. One woman offered to host the first meeting at a central meeting point in Bristol and the initiator constructed an agenda and volunteered to facilitate for the first few hours to begin the process of group formation. Given that members were geographically located across England and Wales, the meeting began at midday on a Saturday and finished early afternoon on Sunday to allow for travel.
The first meeting was used for introductions (since not all members knew each other); establishing some 'ground rules' or group etiquette (Appendix 2); sharing our expectations and hopes of and for the Group; agreeing a structure and process for subsequent meetings, and identifying agenda items (sessions) for the next meeting. ‘Participation [in developmental learning groups] refers to both the process of learning and its outcomes’ (Baker and Lattuca, 2010:813) and, during that first meeting, we were engaged in the task of making processes and desired outcomes explicit. The impact and value of some of the decisions made at that and subsequent meetings are highlighted in Chapter 4 and discussed in Chapter 5. However, it is important to mention here that it was agreed to include reviews of both processes and outcomes at the end of each meeting. These reviews have resulted in several iterations of various processes (including length, location and frequency of meetings; the size of the Group; the role of note-taker,) and changes in focus for the content of meetings. The Group now meets twice a year instead of three times but meetings have been extended to a whole weekend rather than twenty four hours. Sessions have remained varied throughout and have included a range of practical and intellectual activities (see Appendix 3) but, over the years, there has been an increased emphasis on personal development rather than professional development, per se.

What has remained consistent throughout is an explicit commitment to adopting an egalitarian approach and the sharing of responsibility for making it work.

The Group now has seven members, five of whom have been involved since its inception. For these seven members, earlier careers include working as a chemist with a multi-national petro-chemical company, social work, corporate organisational development, business management, architecture, music, creative and other writing, outdoor education and health. Three members have corporate backgrounds in Human Resource Development, five have worked in formal educational settings (school, further or higher education) and all seven have worked as facilitators and trainers. All seven have also trained and practised as coaches, counsellors or therapists and work or have worked independently at some time. Of the three women who left the Group, one emigrated to New Zealand in 2000, one left in 2002 and the other left in 2011, (their reasons for leaving are
discussed in 5). Rather than recruit a single new member and having decided that a group of eight worked well, it was agreed to wait until two people had left before inviting new participants. Consequently, it was not until 2002 that two new members joined the Group and both new members still remain.

1.5 Why Study this Group?

At this point it seems pertinent to address questions relating to what makes this particular group worthy of study and why this study makes an original contribution to what is already known about professional development in small groups. Holmlund-Nelson et al (2010) observe that whilst some people are disposed towards asking questions [within a group] that move it beyond superficial exchanges, ‘it is rare that a group is characterised by this practice’, (ibid:176). Similarly, Illeris (2006) observes that for most provided adult education programmes, participants’ engagement is on a superficial level. As a member of the Group and a participant in other professional development forums, it has long been evident to me that what distinguishes it from those other forums is the level of engagement and corresponding depth of discourses. The factors that might contribute to this very prominent characteristic of the Group’s modus operandi (such as its composition, longevity, self-direction and focus,) are embedded in the research questions listed earlier. It must also be mentioned that in the course of undertaking this study I have been unable to locate (in the literature or elsewhere,) other longstanding groups with a professional development agenda where such practice is standard. That is not to say that similar groups do not exist but, rather, that they do not appear to have been investigated or written about. Yorks and Kasl (2002) offer eight interesting accounts of collaborative inquiry groups in which a similar depth of discourse was aimed for. However, in comparing these accounts, it emerges that all but one of the eight groups had an appointed facilitator, six of the eight groups investigated a specific issue and seven of the eight groups existed only for a specific length of time, usually a period of months rather than years. The only group not functioning within a specified time frame had a five year history at the time of writing, and whilst its focus on professional practice resembled that of the Group, it was smaller in size with only four participants.
What also emerges from Yorks and Kasl’s (2002) publication is that the membership of six of the eight groups was comprised entirely of women and in the two other groups there was only one male participant. Whilst limited and focusing on collaborative inquiry groups rather than collaborative learning groups, these statistics suggest that self-facilitation, longevity and gender are worthy of further investigation and justifiably located in central positions in this study. It is also acknowledged here (and revisited in Chapters 2 and 5,) that many of the principles of collaborative inquiry have been adopted by the Group and that collaborative inquiry is not just a form of research but ....

‘an approach for facilitating adult learning that creates the necessary conditions for effective discourse and honors multiple ways of knowing’, (Yorks and Kasl, 2002:3).

Turning to collaborative learning groups, as already inferred, much of the published work focuses on their use within education and particularly in the school environment, rather than in more generic, professional communities. In her discussion of collaborative learning amongst teachers, Stanley (2011) reaches conclusions that are consistent with those drawn from the accounts edited by Yorks and Kasl (2002). She postulates that the longer a group is together the more likely it is to move beyond ‘friendly politeness’ (Stanley, 2011:74) and superficial exchanges to a point where real growth can occur. However, she points out that there is no evidence to suggest a typical amount of time that might be necessary for this progression. Having formed in 1997, the longevity of the Group presents an unusual and unique opportunity to explore this movement beyond politeness and consensus. Investigating longstanding membership also offers insights into motivation and group dynamics in professional development forums, neither of which, according to Lees and Meyer (2011), have yet been widely considered. Further, an understanding of the impact of longstanding membership on the Group’s members is facilitated by the Group’s longevity and its openness to this investigation.

Whilst there is no doubt that groups of practitioners in many occupational fields are likely to remain affiliated to professional bodies and networks (such as the Teaching Agency, Law Society, British Medical Association, British Psychological
throughout their careers, there is little evidence to suggest that such bodies and networks are characterised by the conditions required for real growth to which Stanley (2011) refers.

Although the secondary data referred to in this thesis has been drawn from a wide range of relevant literature, it will be evident that a case study approach has been adopted to generate primary data. Whilst the narrowness of an inquiry that investigates one group only may limit the generalisability of the conclusions drawn, the intention throughout this study has been to achieve a depth of understanding rather than breadth. In their discussion of the extent to which models for learning in groups can be constructed, Hoppe and Ploetzner (unknown) suggest that ‘capturing only specific facets of actions or interactions in groups’ (ibid: 1), may still lead to interesting insights and applications. Given this specific Group’s longevity, I would argue that developing a greater understanding of it and its members, including those who have left, through addressing the research questions outlined earlier, contributes some original and valuable insights that have broader application for professional development in general. (Further attention is paid to generalisability within Chapter 3.)

1.6 Society, Adult Learning and Identity

When considering the discourses and practices of any group of professionals, Eraut (2007) stresses the need to bear in mind ‘the cultural knowledge that permeates the beliefs and behaviours of their co-workers, their clients and the general public’ (ibid:405/406). The Group exists within a social and cultural era in the Western world variously referred to as ‘reflective modernisation’, the ‘risk society’ and ‘floating modernity’ (Engesbak et al, 2010:619). Yet, despite the differences in meaning and emphasis that these terms infer, there is consistent acknowledgement of the complexity and corresponding new demands for adult education and learning in society. Engesbak et al (2010) summarise the changes in the concepts of adult education and learning since the 1960s, noting that it has remained in step with societal and policy changes. In its infancy, adult education was characterised by an emphasis on civic society and the promotion of a better quality of life and a better society. In turn, it has subsequently been vocationally
focused, democrtised, competency oriented, subject to market liberalisation, globalised and technologically impacted, finally to arrive at a point where it ‘includes almost everything’ (Engesbak et al, 2010:620). With the erosion of traditions and normative frameworks (Biesta and Tedder, 2007) and a strengthening focus on the rights of the individual, particularly since the 1990s, there has been a corresponding shift that now positions adult education and learning as an individual undertaking (Engesbak et al, 2010). The responsibility for extending and preserving human capital and investing in learning has become ‘a task for the modern individual’ (Biesta and Tedder, 2007:133).

Brown (2001) proposes that our understanding of how individuals relate to the organisations and groups in which they participate is closely associated with issues of identity. As in the past, when adult education and learning has reflected societal values, the emphasis placed on lifestyle and identities in today’s society (Engesbak et al, 2010) must be similarly reflected. Participating in deliberate learning\textsuperscript{2} as an adult is therefore likely to signify an aspiration or desire to adopt a particular lifestyle or identity, whether there is a conscious intention to do so or not. However, Brown (2001) also notes that there is ....

\begin{quote}
‘much work to be done examining the conditions under which people are more likely to identify and resist identification with groups’, (ibid:114).
\end{quote}

In his investigation into social movement groups, Gongaware (2011) notes that the commitment of group members is maintained through their participation in a process that aligns the group’s collective identity with the personal identities of its members. He suggests that ‘collective identity is an ongoing process wrapped up in the collective action of the group’ (ibid:48) and ‘it is possible that major shifts in the collective identities may occur’ (ibid:45).

The longevity of the Group under scrutiny offers a unique opportunity to explore the shifts to which Gongaware refers over an extended period of time, and also facilitates some of the work that Brown (2001) mentions (see above). Identity

\begin{quote}
\footnotesize
\textsuperscript{2} What is meant by ‘learning’ is addressed in detail in Chapter 2.
\end{quote}
emerges as a central theme in this inquiry: professional identity, identifying with learning groups or communities, identifying oneself as a motivated, adult learner with a commitment to professional and/or personal development all feature alongside collective identity. (Detailed discussions of identity appear in Chapters 2 and 5.)

1.7 Self-direction and Self-facilitation

Illeris (2006) asserts that the most fundamental difference between children’s learning and adult learning is related to how the learning is controlled.

‘Adults clearly want to decide what they want and do not want to learn. The very nature of adulthood involves both legally and psychologically that the individual assumes responsibility for him/herself, his/her actions and opinions. This is the general situation of learning in everyday life, and thus adult learning is by nature self-directed’, (ibid:21).

Similarly, Parsloe and Wray (2000) emphasise the importance of the individual being able to take personal responsibility for managing their own learning, and Knowles et al (2005) argue that adults have a self-concept of being responsible for their own decisions and for their own lives which should be integral to any adult learning programme. However, the learners’ previous experience of learning, the social and political climate, their preferred approaches to learning and their sense of agency all contribute to a complex picture in relation to self-direction in adult learning (Meriam, 2001; Mezirow, 2000). As far as the teaching community is concerned, Stanley (2011) submits that part of the attraction in joining small, focused groups is the latitude that participants have to shape their own professional development. Further, this ‘unscripted nature stands in relief to the one-way delivery of tips, techniques or ideas’ (ibid:72), which is also highlighted by Lees and Meyer (2011) in their comparison of student-led, facilitated learning with a didactic approach.

Schwartz (1998) argues that agency is central to learning in small groups, and adult learning models often advocate the encouragement of self-direction amongst
learners. Nevertheless, the emphasis is generally on models where there is an educator or facilitator (for example, see Yorks and Marsick, 2000,) or on the instructional model (Meriam, 2001). Guidance offered on learning in groups in a range of environments (see Oakley et al, 2004; Edmunds and Brown, 2010; Stanley, 2011; Holmlund-Nelson et al, 2010; Downs, 2009; Race, 2005, Lees and Meyer, 2011,) also focuses on facilitated learning with the involvement of a tutor, mentor or other person whose specific role is that of organising or leading the learning. Of course, this does not necessarily infer that group members are not self-directing – the lead figure’s role may be entirely focused on group process rather than the content of the discourse. However, models for adults who wish to initiate their own learning in an educator or facilitator-free setting are less in evidence and both types of model – facilitated or self-facilitated - must surely address the complexities associated with self-direction. (Both self-direction and self-facilitation along with the associated issues of power, agency and group dynamics are revisited in Chapters 2 and 5.) Further, Tennant (2009:148) points out that ‘adult education has a long history of interest in the development and transformation of the self’. Yet, as Baumgartner (2001) argues, if learning is transformational (see glossary) which inevitably ‘involves emotions’ .... ‘what right do instructors have to encourage [it]?’ (ibid: 21). This is an ethical question that is likely to fall outside of the scope of this research but, nevertheless, it provides a strong incentive for examining the efficacy of self-facilitated adult learning groups and could be relevant in the development of future models.

1.8 How Relevant is Gender?

Given that all of the Group’s members are women, in addressing at least the first three research questions listed on page 18, it is anticipated that gender-related findings are likely to emerge. As Hayes (2001:36) suggests … ‘the nature of women’s learning remains controversial’. Gender is not positioned as central in this research and is treated with caution bearing in mind that ‘overgeneralisation about differences between women and men [as learners] is a very common pitfall’ (ibid). Nonetheless, it is also acknowledged that ignoring power dynamics in learning relationships results in a failure to support women, in particular, in developing their potential to the full by harvesting ‘the knowledge that [they] have garnered’ through their life experiences (Belenky and Stanton, 2000:73).
Consequently, the relevance of gender to the research questions is considered in Chapter 2 in preparation for further discussion in later chapters.

1.9 An Ageing Group – an Ageing Workforce?

A further area for consideration and one that is related to the Group’s longevity is the increasing age of its members who are now all more than fifty years old. Liu et al (2011) refer to a United Nations’ report published in 2007 that indicates recognition amongst employers of the need to value and retain older workers, rather than provide early retirement incentives. Whilst training and development might offer such an incentive, Liu et al (2011) conclude that older workers encounter more barriers to their professional development than their younger colleagues. When finances are limited and have to be carefully targeted, employers tend to invest less in older workers because their remaining years in work are assumed to be few. In addition, other situational or dispositional barriers might also be at play (such as tensions with other calls on time or the absence of inclination to participate in developmental activities). Nevertheless, it is predicted that the over fifty-fives in the workforce will grow from 13% in 2000 to 20% in 2020 (ibid). If people are likely to stay in work longer, whether employed by others or self-employed, their options for continuing their professional development must surely warrant some consideration but ‘there is scant research examining participation in training from the older worker’s viewpoint’ (ibid:1043). Despite evidence identifying the centrality of self-direction in adult learning (Knowles et al, 2011; Jarvis, 2006), currently…

‘in the workplace, the decision older workers make with respect to participation in training is whether or not to attend’, (Liu et al, 2011: 1043).

Similarly, for most self-employed people, continuing professional development is likely to involve the same choice – to participate or not - and negotiation of the same situational and dispositional barriers. Whilst situational barriers fall outside the scope of this enquiry, dispositional barriers are considered at various points in Chapters 2 and 5, particularly in response to questions 1, 2 and 5 listed earlier.

In recent years there has been a significant growth in the UK of the University of the Third Age (U3A) (Trowbridge, 2007). This is an organisation that promotes
self-directed learning opportunities for older people where ‘the learners teach and the teachers learn’ (U3A). Given this growth, it seems evident that many older people remain interested in learning and are simultaneously drawn to learning situations in which they are able to influence the content of that learning, and exercise some control over the learning processes and approach. The centrality of self-direction for adult learners is again in evidence.

Returning to professional learning, whilst there has been considerable research on motivation and on barriers to participation amongst older learners, there has been little examination of both simultaneously (Liu at al, 2011). Most studies have been carried out with general participants, have rarely included older workers, and have been conducted through the presentation of ready-constructed lists for respondents to choose from (presenting some obvious limitations). Similarly, Wlodkowski asserts that ....

‘There are no major research studies that thoroughly examine the relationship between adult motivation and learning’, (Wlodkowski, 1999:4).

As already inferred, this study examines motivation in respect of longstanding membership of the Group. It also facilitates exploration of the relationship between motivation and learning. In addition and whilst stressing that this study did not intentionally set out to focus on older professionals, it nevertheless affords an opportunity to explore why a specific group of older people remain motivated to engage in a professional development forum. It is therefore anticipated that the findings of this study will make an original contribution to the ongoing debate about professional development for older workers, whether employed or not, and encourage increased consideration to be given to both what is on offer and how it is offered.

1.10 A Summary of Intention

In summary, the approach to professional development that this thesis investigates is presented as a model for consideration by others seeking alternative approaches to those currently on offer in their respective professional fields. It is particularly pertinent for those wishing to initiate and construct their
own, self-facilitated forum for reflective, professional development that extends beyond superficial discourse. Organisations looking for alternative approaches to the usual, standardised models for supporting and enabling the professional development of their employees might also consider the potential worth of promoting membership of self-facilitated, self-directed, collaborative learning groups.

Before moving on to explore and discuss the existing literature and concepts that are relevant to the content of this investigation, the following three sections introduce the employment of a pragmatic, participatory methodology herein. Its relatively untapped potential is highlighted, as is its possible utility for other investigators. Finally, the last section of this chapter provides a brief explanation of the approach to writing that is employed in this thesis.

1.11 A Consistent, Pragmatic Approach

Holding a view of learning at odds with the methodology employed in a study is difficult (Hodkinson and Macleod, 2010). Whilst other difficulties encountered during this research are detailed in later chapters, this particular one has been avoided with the application of a pragmatic ideology throughout.

‘Central to a pragmatic perspective is the belief that meaning is not an objective entity that is out there waiting to be uncovered, but rather meaning is located in human practices – in other words, it is a human construction based on communication, co-operative action and community relations’ (Connell, 2008:104).

The foundations of the chosen methodologies and methods for this inquiry in pragmatic philosophy are further expounded in Chapter 3, but the same philosophical foundations underpin both my own view of learning and the approach adopted by the Group: constructed meaning and values, usefulness and application are placed centre-stage (Floden, 2009). At the same time, this study accepts that the perceived value of a group to its members is closely linked to identity, as inferred earlier, and both perceived value and a group’s very existence are culturally situated (Brookfield, 2000).
As a self-proclaimed pragmatist, John Dewey argued that research should be verified by paying attention to how an individual’s ideas impact on the quality of his or her experience, rather than focusing on the truth or otherwise of a particular hypothesis (Rosiek, 2003). For pragmatists ....

‘the general message is hopeful ..... the possibility of error does not imply that all claims are wrong’, (Floden, 2009:497).

I am hopeful that the findings and ideas that emerge during this investigation, whilst not being offered as the truth might be considered as a truth or a collection of truths (relevant for a particular group of people at a point in time and within a specific cultural setting,) that may be useful to others. At the same time, Putnam’s assertion that ‘every fact is value loaded and every one of our values loads some facts’ (cited in Brinkman and Kvale, 2005:161) is recognised.

This research accepts a fundamental difference between social enquiry and scientific enquiry in respect of the subject matter and the existence of objects that are independent of human beings (Onwuegbuzie, 2002). Whilst recognising that the meaning associated with all objects is socially situated, constructed and manipulated, some objects would still exist without that construction. A pragmatist’s approach to research stresses the importance of matching methods and methodology with the focus of an investigation (Chester, 1991).

A further consistency between my own view of learning and the approach employed in this study is an alignment with Dewey’s acceptance of the iterative relationship between education and personal experience (Sawchuk, 2008), and his advocacy of pragmatism and democracy in learning (Kellner, 2003; Connell, 2008). These underlying principles ultimately resulted in the utilisation of a participative methodology for this inquiry.

1.12 A Participative Study

It became evident in the early stages of planning this investigation that adopting a participative or participatory approach would best facilitate congruency between this work, my own learning ideology and the democratic (see glossary) functioning of the Group. The participative paradigm emphasises collaborative partnerships
and confronts the power dynamics within research relationships, stressing the equal status of researcher and participant (Seale, 2010). By democratising research through empowering the research subjects, it aims to counter the traditional monopoly that researchers have held over the process of knowledge generation and, consequently, the knowing itself (Chesler, 1991). Adopting a participative approach has not been without challenges and its strengths and limitations are discussed in more detail in Chapters 3 and 6 and Appendix 24.

Using a participative approach in this investigation appears to represent a departure from existing, recognised applications of participative methodology in research. It is most often seen as a way of providing a voice to marginalised groups in emancipatory or advocacy contexts to address social injustice; it is about giving a voice to people who do not normally have one in order to challenge the status quo, inform the political agenda, or initiate change (Van der Riet and Boettiger, 2009). From my perspective, ‘giving voice’ infers the facilitation of situations in which people are able to express their views, ideas, thoughts and feelings, both individually and collectively (McIntyre, 2008): in this instance it is about speaking alongside other Group members rather than on their behalf. It is not about perpetuating the power dynamics that the term ‘giving’ might infer which are frequently present in the relationship between researchers and their subjects (Heron and Reason, 1997). (Please see chapter 3 for further discussion of issues of power and hierarchy in research situations.)

Whilst aiming to give the Group a voice, that is to say, facilitate an opportunity for its collective voice and those of individual members (both past and present,) to be heard, this study does so not from the position of believing that it or they have been voiceless, or that there are significant political or change-related issues associated with the Group that need to be surfaced. Rather, it acknowledges the value of active participation of subjects in the research process (Chesler, 1991), and assumes that the Group’s voice allows the questions being posed through this inquiry to be addressed with more integrity and reliability than would otherwise have been the case. Positioning and using a participative approach in this different light – that is to say, experimenting with it in a context without an overt social
justice agenda – means that there is an additional methodological outcome to this study.

The wider utility of a participative research design is offered as something that others might consider as an option for a range of inquiries in the future.

1.13 Perspectives on Learning and Knowing

‘Knowledge and learning can be examined from two perspectives, namely the individual and the social. An individual perspective on knowledge and learning enables us to explore both differences in what and how people learn and differences in how they interpret what they learn. A social perspective draws attention to the social construction of knowledge and contexts for learning, and to the wide range of cultural practices and products that provide knowledge resources for learning’, (Eraut, 2004: 263).

This investigation examines both individual and social perspectives and acknowledges their mutuality (see Chapter 2). Jarvis (2009) argues for the validity of a multi-disciplinary theory of learning, to include sociological, psychological and philosophical dimensions. He asserts that ‘it is the whole person who learns and that the person learns in a social situation’ (ibid:25). This aligns with Tenant’s positioning of a participation antithesis in opposition to an internalisation thesis of learning and his contention that ‘social and psychological planes mutually constitute each other and are inseparable’, (Tenant, 2012:83). As with pragmatism, this mutuality is assumed in both my understanding of learning and in my research. It is pertinent both to the content of this thesis and the processes and approaches utilised in undertaking the associated research and is supported with arguments from relevant literature. As mentioned earlier, the need to clarify the epistemological and ontological starting points and the corresponding approaches used in this inquiry is recognised and addressed in Chapter 3.

1.14 Language, Meaning and Writing

Before bringing this introductory chapter to a close, I would like to draw attention to a number of points relating to writing and the use of language in general terms, and, specifically, within this thesis. Firstly, it will have already become evident that
I am writing in the first person. My justification for this is that my dual position as both doctoral student and participant in this study situates me very firmly in its midst. The epistemological and ethical implications of this are addressed in Chapter 3 but it seems entirely appropriate not to distance myself from the writing or, more importantly given my proximity to it, from the content of what is being written about, by using the conventional third person. Tran’s comment is relevant to this discussion ….

‘Academic discourses in HE have been criticised as being represented as fixed and homogenous since student success particularly in the written discourse community is mainly dependent on their effort to conform to its conventional practices’, (Tran, 2010:159).

In this instance, I am resisting convention and adopting a ‘self-positioning’ approach, which Tran agrees is acceptable in situations where the writer wishes to express ‘personal agency in order to achieve a particular goal in discursive practice’ (ibid:162).

Secondly, I am mindful of Kegan’s observation that ….

‘Some academic writing – that which is most frequently parodied and ridiculed – uses obscure language to hide the fact that nothing terribly original is being expressed’, (Kegan, 2000:47).

I aim for transparency throughout this thesis and endeavour to clarify the intended meaning when using terminology that might be considered ambiguous. Words such as ‘learning’, ‘professional’ and ‘sustainable’ are not used lightly and the intended meaning of terminology used in the context of this study is provided in the Glossary and elsewhere, particularly in Chapter 2. Terms which might be considered contentious, such as ‘individual motivation’ and ‘commitment’ are offered as constructions rather than essentialised notions and, again, are clarified where any ambiguity in meaning might exist. However, it should also be noted that despite my own best efforts to adopt language that reflects this position, for the last thirty years I have worked in a field where knowledge, understanding and skills are frequently objectified. As an independent consultant and facilitator of professional development with a variety of organisations, I have used a different vocabulary to that of the academic world in which I have more recently found myself. It has been necessary to wrestle with the complex tensions of
simultaneously operating in two different arenas (see Appendix 4). Nevertheless, as far as language is concerned, the potential risk of inadvertently falling into *trainer speak* in my writing is acknowledged and I apologise for this in advance.

In response to Kegan’s (2000) expectation of originality in academic writing, in investigating a unique group I would suggest that it is inevitable that something new is surfaced. I am confident that this thesis offers a different perspective on collaborative professional development from previously published accounts and has something original to express which I make clear in Chapter 6, particularly in respect of the implications of sustained group participation.

Lastly, I am also mindful of Kilgore's apparent criticism that ....

> 'Writers on adult learning theory incorporate certain theorists, concepts and language in their texts in order to maintain or gain status and the authority to know', (Kilgore, 2001:58).

In Chapter 2 and elsewhere in this thesis, significant attention is given to adult learning and other theories and a balanced treatment of theorists, concepts and language is intended throughout. Further, avoiding obscurity and aiming for transparency of meaning in language use has already been mentioned and is relevant to both theoretical references and the expression of my own ideas. At the same time, I have adopted a tone that I hope allows my own voice to be heard which, whilst not always consistent with traditional academic expression, is no less academically robust for that (I believe!) As a doctoral student, it seems obvious that I am indeed aiming to gain some status, or at least, recognition that I am capable of thinking and writing at an appropriate level. Also, I *am* attempting to provide some evidence of my ‘authority to know’. Nevertheless, in order to do so I do not feel compelled to make reference to all of the traditional ‘authorities’ on learning to whom I have been exposed through reading, the earlier stages of the EdD and elsewhere. Rather, I have felt unfettered and, again, adopted a pragmatic approach by referring to those who have something to say that is particularly pertinent to this thesis, whether those individuals have been widely lauded as eminent theorists or not.
Given the above considerations and my own orientations, I hope that this written piece demonstrates the intended balance in respect of transparency, fluency and academic rigor that is required. Similarly, and of equal importance in my view, I hope that it manages to engage the reader through to its conclusion!
Chapter 2  An Analysis of the Literature

2.1 Introduction

The purpose of this literature review is three-fold. Firstly, as advocated by Jesson and Lacey (2006), it is an attempt to summarise, analyse and comment critically on current knowledge that has application and relevance to my own research. Secondly, it should enable a refinement of my own research ideas, providing a conceptual platform to build on during later stages of this investigation (Denscombe, 2007). Lastly, this chapter picks up and further explores some of the gaps in existing research and knowledge, alluded to in the introductory chapter.

One of the most significant challenges associated with analysing the literature in this instance has been the limited number of publications directly related to the investigation. Some of the key questions that this study aims to address appear to have received little attention from other researchers and the paucity of published literature has required some creative thinking around the topic (Jesson and Lacey, 2006). Conversely, the range of publications with some relevance to one or other of the key questions under investigation is vast. It has therefore been necessary to exercise some self-discipline in not straying (too far) from the central themes of what encourages, influences and motivates people to engage with and sustain participation in professional learning groups; the role of self-facilitation in such groups (where learning might be transformative); the impact and outcomes of long-term membership of such groups for the participants, and why only some groups work or are successful in continuing to enable participants to achieve their learning goals. Using these themes to navigate the literature seems like a straightforward proposition but as soon as any serious consideration is given to the immense number of publications on learning alone, for example, it soon becomes evident that the task is anything but straightforward.

What seems to be common to most researchers’ experience is that every enthralling thread of literature appears to lead to another of equal interest (Rugg and Petre, 2006). My challenge has been to focus on what is relevant and interesting rather than what is interesting alone. Consequently, after undertaking an initial mapping process, as recommended by Fisher (2007), it was necessary to
narrow the field. ‘Reviewing the literature is not stamp collecting’ (Pautasso, 2013:3) and it seemed important to balance quantity with quality. I therefore chose to use the five key questions (see section 1.3) to provide direction and focus my reading. Retaining this focus has been far from easy and it is possible that such restraint has limited the breadth of reading undertaken and, subsequently, this chapter and the study in its entirety. My intention in adopting this narrowing approach was to provide depth rather than breadth and to reflect the perspectives that I judged to be most important for the study (Fisher, 2007). It is inevitable that, in so doing, a bias will have been introduced (Jesson and Lacey, 2006) and I am still left with the question ‘what have I missed out?’ Nevertheless, one has to start somewhere and, whilst anticipating that an analysis of the data that this study generates will require forays into other areas of literature, the same five key questions are used as headings in this chapter. Further sub-headings that address specific components of each of the questions are also used.

Before tackling the questions though, the proliferation of learning theories and the absence of agreed, unified classifications (Knowles et al, 2011) point to an important preliminary task: that of clarifying the intended meaning inferred when certain terminology is used. Learning is central to this investigation and rather than assuming that learning, professional learning and adult learning are universally interpreted in the same way, the meaning of these terms is discussed before any attempt is made to address the questions posed. In this chapter, the views expressed (where not attributed to specific authors) are my own and do not necessarily represent those of the whole Group. The data generated during this study, offered in Chapter 4 and discussed in Chapter 5, give voice to all members of the Group.

2.2 The Meaning of ‘Learning’, ‘Professional Learning’ and ‘Adult Learning’

2.2.1 Different meanings of ‘learning’ in the literature

‘Learning is like food, ingest it and it will enrich the human being; unlike food, it is difficult to have too much’, (Jarvis, 2006:3).

This strikes me as an apt simile that could be further developed. As with the consumption of food, learning is ongoing and is a lifetime undertaking (Elkjaer,
2009). We are never done with it. Also like food, it comes in many forms and
different people have different ideas about what is good for you and what is not.

The proliferation of learning theories has already been mentioned. Jarvis (2006)
argues the need to recognise that all such theories will have philosophical
underpinnings that both define learning, and explain why and how it takes place.
The traditional explanation of learning as a process of internalisation during which
an individual absorbs knowledge, whether through discovery, transmission or
interaction, is in stark contrast to the view of it as ‘an evolving, continuously
renewed set of relations’ (Lave and Wenger, 1991:50) that takes place through
participation. Yet protagonists of both standpoints appear to recognise it as
socially and culturally positioned. Learning is situated in a cultural context, where
multi-level interactions, relationships, shared values and beliefs exist (Hansman,
2001; Goodall, 2014). Kilgore (2001) refers to knowledge in a similar vein,
contending that it ‘is socially constructed and situated in a particular context’
(ibid:54). I have already placed a stake in the ground regarding my own position
on learning and knowledge in Chapter 1. It strongly resonates with the claim that
knowledge is something that is ‘neither given nor gotten, but constructed’ (Taylor
and Lamoreaux, 2008:52) and enables individuals to examine their own beliefs
through participation in social situations.

Mezirow (2000) asserts that ‘human beings have a generic capacity to learn and to
learn from each other’ (ibid:xiv) and Evison (2006) agrees. Citing the work of
developmental psychologists, she argues that people are innately highly effective
learners and continue to function as such throughout their lives, unless their
ability to do so is damaged in some way. Elkjaer (2009) further endorses this
position and concludes that ‘learning is about living, and as such is lifelong’ (ibid:
88); it extends way beyond the school-based education that most of us experience
during our early lives, and beyond any organised further or higher education
which we might undertake. As Field (2005) points out, the two concepts of
education and learning are very different. Whilst both are important, education is
frequently externally imposed and is more easily described whilst ‘learning is a
much more ubiquitous process’ (ibid:3).
Learning can be formal, non-formal or informal; as Evison (2006) suggests...

‘Learning can mean achieving formal educational goals, developing useful skills from life experiences or undergoing conditioning processes’ .... it .... ‘is the process by which individuals add to their repertoires of skills and knowledge by purposive activity in any arena of life’, (ibid:94).

Eraut's (2004) concise typology of informal learning offers additional dimensions to a definition of learning, accounting for it as deliberative, opportunistic, (that is to say, spontaneous or unexpected,) or implicit (in that it might be independent of any conscious attempts to learn). Despite the differences in terminology used by Evison and Eraut, there is agreement that learning can be deliberatively undertaken, formal or informal, and lead to the acquisition of skills and knowledge. Both writers also seem to objectify knowledge as something that can be acquired or possessed: for me this is reminiscent of trainer speak and does not indicate that they lean towards a view that objectifies learning and knowledge, especially having read what else they have to say. Adopting the term knowing rather than knowledge, as suggested by Jarvis (2006), serves to emphasise its non-static nature but my preference is to retain the term ‘knowledge’ in writing this thesis with the caveat that there is no intended inference that knowledge is static (see section 1.11).

Eraut's (2004) recognition of implicit learning and Evison's (2006) mention of conditioning processes might also account for the knowledge and skills developed throughout life for which we are unable to identify a source - what we perhaps consider to be intuitive or tacit knowledge and skills; things that we just know or can do. The activities in which the Group have participated since its inception (please see appendix 3) have been deliberately undertaken. However, the purpose of these activities has not only been the development of skills and knowledge but, on occasions, the identification of elements of our practice that are intuitive and implicitly known; the testing out of why and how group members know or do certain things.

A further distinction that is pertinent to clarifying what is inferred by ‘learning’ in this study is that offered by Mezirow (2009), who differentiates instrumental learning from communicative learning. The former he describes as ‘hypothesis-deductive’ (ibid:1991): involving developmental logic, it is concerned with the
testing of beliefs and the impact on performance or the environment. The latter
relates to discourse and understanding others’ meaning in order to arrive at a
judgement that is best, rather than true, as is the case with instrumental learning.
As we encounter new information our initial conclusions might be revised and we
continue with the task of meaning-making.

Finally, reference is made to transformative learning throughout this thesis (and
specifically in 2.5.1) which refers to ....

‘the process by which we transform our taken-for-granted frames of
reference (meaning, perspectives, habits of mind, mind-sets) to make
them more inclusive, discriminatory, open, emotionally capable of
change, and reflective .... transformative learning involves participation
in constructive discourse to use the experience of others to [make] an
action decision based on the resulting insight’, (Mezirow, 2000:7).

Mezirow’s perspective is of particular relevance for the Group. Without using the
term transformational, the Group nevertheless discussed and adopted the process
that Mezirow describes above.

In my own writing, then, it is accepted that learning is about making meaning or
meaning-making; it can be formal, non-formal or informal and it can be
transformative. It can be deliberatively undertaken, opportunistic, tacit or implicit.
It can be instrumental or communicative but, in any event, it enables individuals to
increase their capacity to understand, to know and, potentially, to act out
differently in the world.

2.2.ii So, what is professional learning?

“Professional learning” is used to describe any contributions that are
made to the learner’s knowledge or their ‘socialisation into the process’
[of professional practice], (Eraut, 1994:6).

Eraut (2004) equates this socialisation with a focus on meeting social expectations
which he refers to as competence. Professional learning therefore infers
engagement in learning that is relevant to work, enabling that work to be
undertaken with increasing confidence and competence.
In responding to ‘what is professional learning?’ a further question is surfaced; ‘what or who is a professional?’ Twenty years on from Eraut’s observation that ‘the professions are a group of occupations, the boundary of which is ill defined’ (Eraut, 1994:1), identifying the traits that characterise a profession still appears to be problematic. Consequently, throughout this study I will follow his lead and treat professionalism as an ideology without attempting to ‘distinguish “true professions” from other contenders’, (ibid). Professionalism, then, is used to refer to the notion of specialist expertise in the provision of a service to clients. In the case of the group and the practice of its members, that service is the learning and development of others through training, facilitation, coaching and other means.

2.2.iii Learning for adults

Implicit in the term ‘professional learning’ is the assumption that it refers to adult learning rather than that of children. The differentiation of adult learning from children's learning and the andragogy versus pedagogy debate have received considerable attention in recent years (Samaroo et al, 2013). Whilst entering into this debate is unlikely to contribute to this study (and will be avoided), there are some significant aspects of it that are relevant here, specifically, those that focus on adult learning and the notions of agency and identity that some associate with pedagogy (Giroux, 2011) or andragogy (Knowles et al, 2005). Neither term appears to be commonly interpreted or understood. Canning (2007) suggests that pedagogy is both ‘under-defined and under-theorised’ (ibid:393) and Sanguinetti et al, (2005) remark that it ‘is a contested notion with multiple interpretations’.

Smith (2010) describes the development of the term andragogy, noting that it was first coined by Kapp in 1833 and more recently adopted by Knowles in the 1970s. Knowles's andragogy is an attempt to construct a comprehensive theory of learning that is specific to adults and rooted in what he sees as characteristics of adult learners (Merriam and Caffarella, 1991). Knowles et al (2005) argue that andragogy acknowledges the life experiences on which adults are increasingly able to draw as learners, and that their readiness to learn is oriented towards their social roles. They also emphasise the shift in adulthood from the acquisition of general knowledge that might have long term relevance to an interest in knowledge that has more immediate application. Further, they assert that adult
learners are internally motivated and that this is constructed as they progress through life towards maturity. Finally, they argue that adults learn best if they are self-directing.

Knowles et al’s assertions are frequently disputed for being overly simplistic and/or based on faulty assumptions that polarise adult and child learners. As Smith (2010) points out, children also inhabit social roles and these are going to be influential in their learning. In his later writing Knowles sensibly downplays the child-adult dichotomy (Knowles, 1984), but he is not alone in asserting that adult educators need to approach their task differently to child educators (see, for example, Mezirow, 2000; Illeris, 2008).

Knowles (1984) claims that andragogy provides a process model whilst pedagogy provides a model for content. Both process and content are pertinent to this study, particularly in respect of what encourages, influences and motivates people to engage with and remain engaged in professional learning groups. Samaroo et al (2013) attempt to bring andragogy and pedagogy together by offering a democratic model, pedandragogy, that appears to usefully accommodate content and process. Despite the somewhat unwieldy name of the model, its major themes of promoting self-direction and engagement (in respect of both process and content,) the centrality of learners and the recognition of the role that previous experience might play alongside both internal and external stimuli are well-supported. Its relevance for adult learning groups seems obvious but, as with the majority of literature in the field, there is an assumption that an educator is involved - in this case, a promoter of self-direction. The Group is without such a promoter and the implications of this for self-direction and the Group’s success (or otherwise) in fostering an environment that enables transformational learning are revisited shortly. At this point, however, the importance of self-direction for adult learners is accepted, in respect of both what is learned and how it is learned. Similarly, that adults draw on their life experiences and that this will impact on their participation in learning groups is not disputed and will shortly be revisited.

Learning is central to this study: the glossary included earlier offers some explanation of the inferred meaning of certain learning-related terms but is
necessarily brief. The intention of this section is to clarify my own interpretation of different perceptions of learning, professional learning and adult learning, informed and supported by relevant literature, before going on to address the questions posed in this thesis throughout the rest of this chapter and beyond.

2.3 Question 1: What encourages, influences and motivates people to engage with and participate in professional learning groups?

2.3.1 Motivation to learn

Wlodkowski’s (1999) definition of motivation to learn as ‘a person’s tendency to find learning activities meaningful and to benefit from them’ (ibid: 4) is accepted for this study, as is his proposition that individuals are the history of their lives and that motivation cannot be separated from one’s cultural foundations. Also accepted is the idea that ‘individual people are microcosms of their social environments’ (Fook and Gardner, 2007:15). Consequently, it is acknowledged that what motivates individuals to learn will be driven by what is generally perceived to be important or desirable within their specific socio-cultural context. If activities associated with professional development are valued, people are likely to be motivated to participate in them.

Liu et al (2011) categorise adults who are motivated to participate in education and learning activities as either goal-oriented, activity-oriented (satisfying social needs through education and learning,) or learning-oriented (seeking knowledge for its own sake). In addition and when trying to understand older people’s motivation to participate in learning, Liu et al (2011) argue that sociological and psychological factors are at play. They note that the literature points to core motivators that encompass both, including ‘self-efficacy, training benefits, social support, propensity to learn and career aspirations’, (ibid:1046). What Liu et al fail to mention (unless it is implicit under the umbrella of achieving specific goals,) is the drive to make meaning of our daily lives, highlighted in Chapter 1.

‘Because there are no enduring truths, and change is continuous, we cannot always be assured of what we know or believe. It therefore becomes imperative in adulthood that we develop a more critical worldview as we seek better ways to understand the world’, (Taylor, 2008:5).
This includes developing our capacity for negotiating and acting upon ‘our own purposes, values, feelings and meaning rather than those we have uncritically assimilated from others’ (ibid:8). Whilst acknowledging that our cultural and social foundations will have been instrumental in why we might want to learn, learning focused on understanding the world and making meaning necessarily involves challenging our assumptions. Of course, not all learning falls into this category but we learn more and are more able to retain what we have learned from situations that involve interpersonal interactions rather than from those in which we are instructed (Janusik and Wolvin, 2007). This supports the emphasis placed on self-direction for adult learners remarked on earlier, but neither instruction nor interaction are solitary occupations and both necessarily involve other people. The idea that learning is a social activity and the benefits of learning in groups, communicative or conversational learning (see Cranton, 1996; Mezirow, 1997; Baker et al, 2002; Downs, 2009; Race, 2005) are not disputed here and Liu et al (2011) cite the satisfaction of social needs as one of the main reasons why individuals might be motivated to learn. Hence, I would argue that there is mutuality in group learning between the quality of the learning experienced and satisfying social needs through the learning.

Taylor and Lamoreaux (2008) summarise the interplay between the individual and social elements in meaning-making and emphasise the effectiveness of dialogue as a reflective tool for examining meaning. They suggest that such reflection can be an individual undertaking but perhaps this ought to be described as a monologue rather than a dialogue. Without wanting to compare the effectiveness of individual reflection with reflection in a group setting, (I would suggest that both have their uses and can be undertaken independently of each other or in tandem, as suits the individual,) reflecting alone is surely limited in much the same way as a monologue – there are no other voices contributing different perspectives. Reflecting in a group enables other perspectives to be offered and considered; unlike solitary reflection, it is more likely to facilitate learning if we agree that ....

An individual’s habits of mind (such as their assumptions about what is moral or ethical, their self-concept or their learning styles,) act as filters in making meaning and become expressed as points of view. Together, habits of mind and points of view comprise an individual’s frame of reference which will be more or less reliable, depending on the degree to which they are open to others’ viewpoints, critically reflect on their assumptions and are capable of integrating experiences and change (Mezirow et al, 2000).

Returning to motivation, although it should not be seen as an either-or condition, it is safe to assume that if motivation to learn is very low, or more precisely, a readiness to engage in activities that might result in learning is very low, there will be an equivalence in terms of what is learnt (Wlodkowski, 1999). Conversely, a personal interest in a topic combined with a love for learning will lead to a propensity for learning (Liu et al, 2011). However, in their study of inter-professional development, Lees and Meyer (2011) conclude that whilst it is apparent that the motivation of group members to learn and issues of group dynamics have an important influence on learning, neither has yet been considered widely. This investigation provides an opportunity to consider both motivation and group dynamics in some depth and both are discussed in later chapters.

2.3.ii Developing the professional self through participating in groups

The professional self evolves over time and professionalism is inextricably linked with attempting to develop practice and tackle issues and challenges relating to the job (Day et al, 2006). As Eraut (1994) points out, specialist professional expertise can be developed through a variety of pathways in addition to a period of study in higher education. These pathways might include a significant period of training or internship alongside experts in the field, qualifying with an occupational association and/or gathering a portfolio of evidence of practice to demonstrate competence. A further pathway that is common when a field of work is ....

‘free of examinations or other forms of assessment’ relies on ‘the gradual acquisition of craft knowledge through demonstration, practice with feedback and possibly even coaching’, (Eraut, 94:6).
This last pathway accurately describes the majority of my own developmental experiences as a facilitator of learning for other people. At the beginning of my work in the field and without ever naming it as such at the time, I followed what was essentially an apprenticeship with several facilitators who were considered skilful by their colleagues and clients alike. These were my role models who also provided feedback and coaching, helping me to reflect on my own practice and enabling ‘legitimate peripheral participation’ (Lave and Wenger, 1991:30) which, in turn, led to my full participation as a practitioner in the field. Eraut (1994) asserts that most areas of professional knowledge are ‘constructed through experience’ and ‘its nature depends on the cumulative acquisition, selection and interpretation of experience’, (ibid:20). Accepting this argument and recognising that such cumulative acquisition does not end with the completion of an apprenticeship but is a continuing process, participation in a group forum with other professionals can enable ongoing selection and interpretation of experience. In addition, if other participants are from the same area of professional practice, it is fair to assume that the initial common ground and shared vocabulary will assist in further meaning-making, particularly through reflecting on experience together.

Malcolm et al (2013) propose that ...

‘Professional practice entails a complex reconciliation of external/‘official’ and internal/‘principled’ narratives of the profession’, (ibid:1).

Both of these narratives are frequently idealised and unaligned. The protocols of a profession that regulate and guide practice are often developed to reform that profession, aiming to standardise practice. On the other hand, many of the tacit rituals and elements of practice that are rooted in a profession’s history and learned from other, more experienced practitioners, are less tangible to those outside of the profession (Malcolm et al, 2013). Standardisation therefore offers a benchmark against which practice can be judged from the outside, but what else might be used to evaluate or distinguish one standardised professional from another? Rich and deep professional learning must surely go beyond developing understanding and knowledge that allows an individual to attain the status of an externally recognised practitioner. Participation in a professional learning group
is one way of enabling continuing professional development and access to the narratives of the respective professional field.

'It is only through interaction and sharing that we can develop our own selves. [ ] It is through interaction that we experience other people, and this is a primary experience. But it is not just the person we experience; in the interaction we share our narratives and even listen to each other's discourses', (Jarvis, 2006:85).

Participating in learning groups rather than being confined to dyadic learning relationships opens up channels for richer diversity in respect of the potential actors, the discourses and the range of relationships that might be encountered (Lave and Wenger, 1991). Similarly, as Fook and Gardner (2007) argue....

'Individual people are social beings whose personal characteristics are formed and reformed in interaction', (ibid:15).

I would also venture that professional characteristics are likely to be formed and reformed through learning group interactions; the activities within such contexts shape the learning that takes place (Hansman, 2001). For those who work alone, as is often the case for members of the Group, an opportunity to learn collaboratively is attractive, offering 'a balance to the isolation and fragmentation' (Yorks and Kasl, 2002:93) that they experience as practitioners. Given the appropriate conditions, participation also offers an opportunity to engage in meaningful discourse and regular reflection, taking people beyond the standardisation mentioned above and enabling them 'to retain critical control over the more intuitive parts of their expertise', (Eraut, 1994:155). Mezirow (1996) asserts that 'discourse is not a war or a debate; it is a conscientious effort .... to build a new understanding', (ibid:170).

In the case of professional development, as with any form of learning, its generality 'always lies in the power to renegotiate the meaning of the past and future in constructing the meaning of the present circumstances', (Lave and Wenger, 1991:34). The next section considers the construction and renegotiation of meaning in group contexts.

**2.3.iii Collaborative inquiry or communities of practice?**

Although previous research has provided little evidence that working in small groups results in learning beyond that which can be achieved by the most
competent member of the group working alone (Schwartz, 1998), this flies ‘in the face of common sense’ (ibid:2). It also begs the question ‘what is meant by learning?’ discussed earlier. When recognised as an ongoing, transformational process, much has been written to argue the efficacy of participating in groups; collaborative, communicative or conversational learning; and communities of practice (Lave and Wenger, 1991; Mezirow, 1997 and 2000; Wenger, 1998 and 2009; Baker et al, 2002; Hollins et al, 2004; Pereles et al, 2005). Despite differences in terminology, all of these approaches to learning involve the formation of groups, generally comprised of peers with similar aims, intending to share experience, reflect on practice, and gain insights through group activities and discourse.

Yorks and Marsick (2000) distinguish two strategies for group learning – action learning and collaborative inquiry. The former they describe as people being placed in teams to collectively resolve an issue or problem through reflection and discussion. The latter involves a group of voluntary participants framing its own focus without external interference. In both cases, Yorks and Marsick are referring to group learning within organisations that is intended to address elements of practice such as consistency or quality; in other words, to work towards the standardisation referred to earlier. What differentiates these two strategies is how groups are formed rather than why they form: they are respectively assembled by others or self-assembled to resolve a specific problem, after which they disperse.

I have already described the Group as collaborative in nature and, given that it was self-assembled and relies on discourse and reflection, there is an alignment with Yorks and Marsick’s (2000) description of collaborative inquiry groups. In other respects the Group deviates from Yorks and Marsick’s description; specifically, in its purpose for forming - the why, and the what, in that its focus extends beyond problem solving. Its intended purpose was not to resolve a specific issue and to then disperse but to create a forum for ongoing discourse and meaning-making, of which problem-solving forms just a part. In these respects, the why and the what, the Group resembles Etienne Wenger’s community of practice, which he describes as ....
'a group of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly', (Wenger, 2006:1).

Wenger points out that this definition, whilst not assuming intentionality, still allows for it and learning can either be the reason for a group's formation or an incidental outcome of the interactions of its members. Members of a community of practice have a shared interest or domain and there is a mutual commitment to this, distinguishing them from other people. Active members of a community of practice ‘can discover, shape, and make explicit their own knowledge’, (Hansman, 2001:50). Members’ interest in their shared domain leads them to build relationships, help each other, share information and participate together in activities and discussions, resulting in the ‘multiplication of knowledge’ (Hargreaves and Gijbels, 2011:69).

Wenger’s theory therefore integrates meaning, practice, community and identity; the idea of communities of practice offers a conceptual framework that encompasses the interdependence and interconnections between these elements (Wenger, 2009; Wenger, 1998). According to Wenger (2009), communities of practice are informal, pervasive and integral to life. They rarely come into explicit focus but are, nevertheless, familiar. The term may only have been coined relatively recently but the experience is not new and most communities of practice are not named as such. Whilst the Group closely resembles a community of practice, as with the concept of collaborative inquiry groups, there are some differences.

Communities of practice are about content; they are about learning as the lived experience of negotiating meaning; they not about form. ‘They can be recognised, supported, encouraged, and nurtured but they are not reified, designable units’, (Wenger, 1998:229). The Group is also about content; it was assembled with an intention to focus on professional development, but it is also about form. Whilst accepting that a learning group is a constructed entity rather than something concrete, the Group’s design and form have been considered and negotiated in depth and at length by its members since its inception. These too, the form and design, are acknowledged as abstractions, some aspects of which may have been reified by the Group such as its ground rules.
A discussion of the significance and impact of form in respect of sustaining engagement in learning groups follows, but a further difference between the Group and Wenger’s communities of practice relates to the composition of the Group, the who. Wenger argues that ‘the existence of a community of practice does not depend on a fixed membership’ (Wenger, 1998:99) and that movement in and out of a community of practice is essential for its longevity. Although one person has moved out of the Group, there has been no movement into it for more than ten years. This case study therefore offers an opportunity to investigate a long-lived group that mirrors elements of both collaborative inquiry (the how), and communities of practice (the why and the what), but with its own versions of form (a different aspect of the how,) and of membership (the who). Rather than entering into a typological debate regarding the nature of the Group, (which I am not convinced will add anything to this investigation,) I would prefer to describe it as a learning group to which the following adjectives apply: self-facilitated, collaborative, professional, developmental, transformational, long-lived and stable (as regards its membership).

2.3.iv Identity and identification

People create themselves by creating spaces and places (Cannatella, 2007). Participation in the relationships that occur in these places, such as belonging to a community of practice, is associated with identity. ‘Thus, identity, knowing and social membership entail one another’, (Lave and Wenger, 1991:53).

For this investigation, identity is understood as positional, strategic, multiple, and constructed ‘across different, often intersecting and antagonistic, discourses, practices and positions’ (Hall cited in Hall and du Gay, 1996:4) rather than an unchanging core of the self. It is built through social engagement and, as individuals participate in different contexts, it is ‘constantly being renegotiated’, (Clegg, 2008:243).

West (2006) contends that ...

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I am ‘borrowing’ Rudyard Kipling’s poem, included as Appendix 5, for the ‘who, what, why and how’ terminology. The ‘where and when’ also emerge in later chapters.
This is a world that appears to provoke deep uncertainties around notions of identity at many interconnected levels. Insecurity and constant changes in working life ... can have profound implications for individuals’ senses of who they are’, (ibid:40).

So, how does one negotiate such profound implications? According to Fook and Gardner (2007), many participants in groups that undertake reflective professional work together are primarily interested in reducing uncertainty (in its many guises), minimising risk and finding the right answers to the questions they have relating to their own practice. This perspective suggests a belief that there is a right answer for every problem and an intolerance of ambiguity (Belenky et al, 1986). Yet, as established in the opening chapter, ‘there are no right answers’ in professional work (Fook and Gardner, 2007:6); a sentiment with which I believe all members of the Group would agree. Whilst there may be a passion for making meaning in the Group, I also believe that tolerance of ambiguity is high as regards flexibility in professional practice. Nevertheless, putting some stakes in the ground through participating in and developing associations with groups and organisations offers one way of reducing identity-related uncertainty, whether consciously undertaken with that purpose in mind or not.

The relationship between identity and participating in groups is complex; understanding the conditions that encourage or discourage people to identify with groups is still a work in progress (Brown, 2001) and one to which this study can contribute. How an individual presents herself or himself within a group, or how that same individual identifies with the group when s/he presents herself or himself outside of the group, are identity-related. Both facilitate the management of self-perception and the presentation of an impression of self to others (Brown, 2001). The construction of identity through membership of different groups and the ‘relatively simple processes of identification and categorisation of the self and others’ (ibid:115) can also be driven by a need for self-esteem. Identifying with and being identified with groups and organisations that, in turn, have their own identity, albeit discursively constructed (Brown, 2006), is a form of social capital (Bourdieu, 1977); it makes a statement about the individual members of those groups and organisations. Similarly, identifying with a group whose focus is the professional development of its members legitimises the practice of those members (Lave and Wenger, 1991). Conversely, I would argue that identifying a
group or organisation with its members will also provide legitimacy for the group itself if, for example, the professional practice of those members is highly thought of.

A more comprehensive and general discussion of identity is provided in appendix 4. However, when considering the value of learning groups to their members and what motivates and encourages people to engage with them, the key identity-related themes that emerge from the literature accessed are that participation legitimises practice, maintains self-esteem and facilitates the reduction of uncertainty.

2.3.v What motivates women to engage in learning?

In the case of an all-female learning group, some discussion of this question is pertinent but there are inconsistencies in the results of research relating to gender and the motivation to learn (Chen and Chih, 2012). Whilst there is evidence that women are more likely to pursue learning (beyond school, further or higher education,) for stimulation and social interaction, they might also do so for its career enhancing benefits (McCormack, 2006). Comparing women with men in learning situations, Rager (2007) observes differences in respect of privacy needs, wanting to connect with others, personal growth and how emotions are handled. Conflicting findings have identified a career development focus as predominantly male in some instances or equally shared by men and women in others (Chen and Chih, 2012). Such inconsistencies may reflect variations in research and sampling approaches employed in different investigations. Nevertheless, although there is disagreement regarding how it does so, researchers agree that gender does ‘affect .... motivation orientation’, (ibid:548).

As Hayes (2001) observes, there is a tendency to emphasise the appeal of subjective, relational and collaborative learning to women and that of competitive, objective learning and advice sharing to men. She goes on to caution against over simplifying motivational orientation in a way that reinforces stereo-types.

‘Gendered ways of knowing may differ by society, culture, ethnic group, locality and so on, thus potentially resulting in differing learning
preferences among women as well as between women and men’, (Hayes, 2001:39).

Because of the all-female composition of the Group, any gender-related data emerging from this study will not add anything to the conflicting comparative data mentioned above, and every attempt will be made to avoid the kind of stereotyping which Hayes criticises. However, motivation is integral to this study and the data it offers should at least shed some light on what motivated its members to join the Group. As Schwartz (1999) observes, ‘the desire to understand and be understood is a strong motivation of human behaviour’ (ibid: 203) and I suspect that this will emerge as particularly relevant for the Group. Whether there is any gender-association with being understood and understanding others remains to be seen. The participation of all Group members in this study, both those who remain members and those who do not, also provides an opportunity to explore what sustains motivation to learn in this type of forum and any corresponding learning preferences, whether gender-related or not.

2.4 Question 2: What sustains engagement and participation in professional learning groups?

2.4.i Shared understanding, alignment and trust

A group does not form merely through collecting together a number of individuals. It is only when interaction takes place that a group comes into existence (Edmunds and Brown, 2010). But, having formed, what enables this interaction to be continued and developed in order that a group’s members remain engaged?

‘The need for reciprocal understanding between collaborators [is an] essential prerequisite for collaborative learning. Such reciprocity involves individuals establishing, through the negotiation of meaning, mutually shared “common knowledge”’, (Littleton and Hakkinen, 1999:21).

Establishing any depth of understanding takes time. In a summary of research on collaborative learning and study groups in the teaching profession, Stanley (2011) suggests that the length of participants’ commitment to a group is important in that it facilitates movement beyond ‘friendly consensus’ towards ‘real growth’ (ibid:74). However, she notes that there is no clear evidence in respect of required
group longevity to achieve meaningful learning and productive dialogue. Meriam (2001) also highlights a need for further research to increase understanding of ‘how some adults remain self-directed in their learning over long periods of time’, (ibid:10). Many studies of collaborative groups (for example, Klenowski et al, 2011; Holmlund-Nelson et al, 2010, Maher et al, 2008; Baker and Lattuca, 2010,) make reference to groups that have worked together for the duration of their doctoral studies or for set periods of a year or less. Given the longevity of the Group, it affords an opportunity to explore the conditions and influences that sustain engagement and participation for many years.

Belonging to a community of peers fosters and maintains commitment to critical reflective practice and the associated transformations to which it can lead. ‘We ..... need our critical friends to provide emotional sustenance, to bring us “reports from the front” of their own critical journeys’, (Brookfield, 2000:146). Yet professionals can also be guarded about their practice for fear of exposing themselves in some way or, conversely, be disinclined to give away their professional secrets. So, what enables a group to operate at a deep rather than superficial level? Wenger (1998) describes the development of close relationships in communities of practice through defined and mutually understood enterprises, shared idiosyncrasies and shared repertoires but ‘the potentially productive role of conflicting perspectives’ (Littleton and Hakkinen, 1999:21) for learning groups must also be remembered. Activity theorists propose that conflict can lead towards collective learning (Field, 2005). Disagreements, arguments and negotiations can all play a part in valuable, peer interactions and stimulate further reflection. Reciprocal understanding needs to be in place to facilitate the more productive rather than destructive consequences of disagreement and argument, since there must surely be potential for both. What emerges from the literature is the importance of building shared understanding and trust with other group members in order that disagreement and argument is experienced as productive (Littleton and Hakkinen, 1999). This is bound to have implications for a group’s longevity; it seems unlikely that individual commitment to participation will survive prolonged unpleasant antagonism, for example.
Similarly, for participants to openly discuss their concerns, shortcomings and challenges, and admit what they do not know, a safe environment in which there is trust between group members is essential (Van de Wiel et al, 2011). With developing trust in mind, Armstrong (2004) positions reaching agreement on *ground rules* as probably the most important action to be performed by any new group at its outset. He argues that ground rules should help rather than hinder group effectiveness by anticipating the potential difficulties that a group might encounter in its interactions, and establishing what corresponding, preventative behaviours are acceptable within the group.

An individual’s identification with a particular group is likely to result in their conforming to and identifying with its norms, values and practices: when s/he belongs to multiple groups, it is unlikely that these will be consistent. Consequently, there is considerable potential for internal conflict as an individual wrestles with the contradictions that they may encounter (Sacharin et al, 2009) between, for example, a hard-edged business environment and being a parent. ‘Conflicts between identities can become more pronounced when the identities are important to the individual and vice versa’, (ibid:276). In a supportive learning group, individuals need not be left to negotiate such conflicts alone and, again, ground rules have a part to play. For newly forming groups, in establishing the norms, values and practices with which members want to work, such potential conflicts can be surfaced, assuming there is agreement that doing so is an important task.

Once ground rules or ‘interaction rules’ (Dillenbourg, 1999:6) have been established, it is important that they are revisited. Many people claiming to have had negative experiences in groups report that there was little or no on-going evaluation of behaviours and interactions following group meetings (Lizio and Wilson, 2005). Without regular review and realignment, there is a danger that any outdated norms, shifting interests, unproductive practices or changing values will be left unacknowledged or unaddressed. As such, it seems more likely that these will become a deterrent to continuing membership, rather than mediate the long-term participation of individuals.
‘Engagement, imagination and alignment work in combination, even though their respective demands may at times conflict. The challenge, then, is to enable a combination of all three without letting the need for one be fulfilled at the expense of the other two’, (Wenger, 1998:263).

It seems evident that engagement in a learning group is more likely to be sustained if its non-stable, dynamic and shifting elements are recognised and realignment is openly negotiated.

2.5 Question 3: What is the efficacy of self-directed and self-facilitated groups in achieving ongoing, transformative, professional learning?

2.5.i Transformative learning

In the introductory chapter of this thesis, mention was made of the intention to clarify the intended meaning of any terminology that might be open to multiple interpretations. I realise that the above question is laden with words that might be interpreted in a number of ways. Whilst the glossary offered earlier provides brief explanations and professional learning is discussed earlier in this chapter, much of this section must also involve a more in-depth treatment of meaning so that the question can be addressed. I will start with the meaning of the term transformational or transformative learning and then proceed to discuss what both self-direction and self-facilitation infer before considering how effective they are in enabling transformative, professional learning.

Transformative learning involves change; it is about challenging and making changes to how we think or act (Brookfield, 2000). Taylor (2008) describes transformative learning as discursive, involving a process that is ‘formed and circumscribed by a frame of reference’, (ibid:5). This aligns with Mezirow’s constructivist notion of transformative learning which he infers is ....

‘understood as the process of using prior interpretation to construe a new or revised interpretation of the meaning of one’s experience in order to guide future action’, (Mezirow, 1996:162).

Mezirow’s version of transformative learning focuses on individual meaning-making and transformation ‘through participation in constructive discourse’, (Mezirow et al, 2000:8). He believes that individual transformation can lead to
social change but others suggest that transformative learning goes way beyond the individual and can be held by or occur within groups (Segers and De Greef, 2011). Transformative learning can begin and end with the individual but it need not and frequently does not. One criticism of Mezirow’s theory is that it is western-centric and does not acknowledge the centrality in some societies of the group or community, as opposed to the individual (Segers and De Greef, 2011). In defence of his position, Mezirow (2009) argues that learning need not be a servant to....

‘a particular ideology, religion, psychological theory, system of power and influence, social action, culture, a form of government or economic system' (ibid:96).

Instead, he asserts that ‘transformative learning is essentially a metacognitive process of reassessing reasons supporting our problematic meaning perspectives’ (ibid). In other words, whilst acknowledging the use of prior interpretation as a starting point, through critical and rational reasoning, it is possible to construct new or revised interpretations of the meanings of experiences to guide future action.

Much of the research conducted on transformational learning has centred on the individual, with only limited inquiry into group and organisational transformation (Baumgartner, 2001). Transformation is considered from both perspectives in this investigation as is the mutuality between the two. For the individual, their professional practice and any other transformative outcomes of group participation are explored and, for the Group, its transformative journey over its lifetime to date is investigated.

Hill (2008) argues that transformative learning rests on ....

‘a theory of existence that views people as subjects not objects, who are constantly reflecting and acting on the transformation of their world, so it can become a more equitable place to live’, (ibid:8).

This is relevant to the discussion on self-direction and self-facilitation to follow. Because culturally embedded language and social practices are influential in constructing learning, both understanding and meaning will be facilitated and inhibited by the knowledge-power networks in which they are rooted (Mezirow et al, 2000).
Accepting transformative learning as a desirable thing, Hill (2008) questions how it can be fostered and concludes that encouraging critical reflection and creating opportunities to practise are both necessary. The onus to foster transformative learning may rest with educators or with the learners themselves, as with the Group. In either situation, without practice to reflect on and opportunities for testing new perspectives, the likelihood of transformation diminishes (Hill, 2008). Segers and De Greef (2011) see transformation as a three stage process, the first of which is the examination and reformulation of previous perspectives in order to develop new ones through critical reflection. Secondly, the new perspectives are validated through discourse during which well-informed others are consulted. Thirdly, people act, making use of the new perspectives which later become internalised and integrated. When the central focus of a group is professional development, opportunities to act and practice professionally are necessary if practice is to be transformed. If the focus of a group is something other, opportunities to act in respect of that other are equally necessary.

2.5.ii Self-direction and self-facilitation

Self-directed learning is defined by Knowles (1975) as ....

‘a process in which individuals take the initiative, with or without the help of others, in diagnosing their learning needs, formulating goals, identifying human and material resources, choosing and implementing learning strategies and evaluating learning outcomes’, (ibid:18).

Synonyms for this definition might include independent learning, self-education and self-teaching. Meanwhile, Candy (1991) observes that the term self-direction is frequently used to indicate four quite different phenomena. It might variously infer ....

‘a personal attribute’; ‘a willingness and capacity to conduct one's own education’; ‘a mode of organising instruction in formal settings’ or ‘the individual, non-institutional pursuit of learning opportunities’, (ibid:23).

Marsick and Watkins (2001) position self-directed learning alongside networking and mentoring as approaches to informal learning which can ‘take place wherever people have the need, motivation and opportunity’, (ibid:28). They also propose that ‘informal and incidental learning generally takes place without much external
facilitation or structure', (ibid:30). Likening informal learning to incidental learning may not always be useful given that there are arguments for structuring both self-directed learning (referred to earlier in the discussion on form and process,) and mentoring (Garvey et al, 2009; Megginson and Clutterbuck, 2005,) which are unlikely to apply to incidental learning. Perhaps what is problematic in their argument is the suggestion that self-directed learning is informal. It can be but it can also be formalised or, at least, organised, as Candy (1991) suggests. In agreement with Candy, Marsick and Watkins (2001) acknowledge that learners can enhance their own informal learning by being proactive and increasing their awareness of and participation in situations that enable them to gain insights from informal experiences. As Van de Wiel et al (2011) assert, ‘learners who want to master a topic and improve their knowledge and skills take control over their own learning and are able to plan, monitor and reflect on their actions to achieve their goals’, (ibid:12).

When adults accept responsibility for their own learning - when they are self-directing - there is little doubt that learning [whether transformative or otherwise] progresses better (Illeris, 2006). The extent to which accepting this responsibility extends to self-reliance for the learning process, rather than being assisted by or depending on others for this, moves this discussion away from self-direction towards self-facilitation.

There are numerous texts offering guidance to facilitators on all manner of ideas and activities to engage groups in transformative learning focusing on self-development (Tennant, 2012; Baumgartner, 2001). In these texts it is noticeable that reference is consistently made to what an educator might do, inferring that creating an environment in which transformative learning can occur rests with an authority figure rather than with the learners. Similarly, in collaborative learning situations, the presence of a facilitator is frequently assumed, with a remit to provide an initial structure, set an appropriate atmosphere and ask questions that will foster openness and reflection. The role can also encompass scene-setting and theoretical input that aims to enable participants to understand, for example, the purpose and utility of reflective practice (Fooks and Gardner, 2007).
The importance of the facilitator’s role in formal educational settings where students are being encouraged to participate in collaborative learning is evident, especially given the reliance on interactive processes for its success (Lizio and Wilson, 2005). For organised professional development groups where there is an educator or trainer appointed to facilitate collaborative, transformational learning, the interpretation of the role described above is also likely to be relevant. Creating and maintaining conditions that enable open participation in discourse, non-judgmental receptivity to others’ points of view, and equal opportunities for participants to engage in discourse is fundamental for transformative learning to occur (Mezirow, 2006). It seems safe to assume that a skilful facilitator in any learning context can enable deep learning, if that is what is intended. Assisting people to create and use group-generated normative practices and protocols (ground rules) that explicitly value the expression of conflicting views and opinions, and modelling appropriate behaviours and strategies, can encourage deep and meaningful conversations and reflection. However, not all groups achieve this even when it is intended, and opening up one’s practices to the scrutiny of fellow practitioners can leave people feeling very exposed. Regardless of any protocols for group practice that may be agreed, if the nature of conversation is not given particular attention there is always a danger that exchanges will not progress beyond the superficial (Holmund Nelson et al, 2010). A facilitator therefore plays an important role in helping to generate the safe conditions in which group members can feel able to participate in meaningful discourse (Lave and Wenger, 1991).

In adopting a self-facilitating approach, a group necessarily becomes self-directing; there is no one else imposing a direction on group members and any such imposition will be experienced between group members. When a group self-facilitates, the part that a facilitator would normally play in establishing protocols and fostering safe conditions needs to be given careful consideration. The responsibility no longer rests with an authority figure but must lie with each and every member of the group (Baumgartner, 2001). Accepting this responsibility and aiming for open and honest dialogue is likely to support creativity and innovation rather than the mediocrity that can arise from superficial exchanges, but there is little evidence to support this claim in the literature.
Socially-situated learning situations that involve an educator, teacher, trainer or facilitator, will be asymmetrical as regards power, no matter how inclusive or non-directive the educator’s approach (Mezirow et al, 2000). The power dynamics in the educator-learner relationship and the need to examine them are further highlighted by Brookfield (2000) who considers how power over learners can be transformed into power with learners. Speaking as an educator, Brookfield argues that …

‘No matter how we protest our desire to be at one with the learners, there is often a predictable flow of attention focused on us’, (ibid:137).

In self-facilitated learning communities comprised of peers, where all participants are both educator and learner, the flow of attention is likely to be less predictable and power-dynamics altered, although, again, there is little evidence to support this. That is not to say there will be no power-dynamics in evidence within groups of peers; indeed, the complexities and subtleties of power within relationships, no matter how equitable, are acknowledged. Nevertheless, this should not be a deterrent to attempting to minimise power over and maximise power with through whatever mechanisms and strategies are available.

Lave and Wenger (1991) suggest that whilst equal status between participants in a group may well result in free interactions, it is not easy to achieve. Adopting a self-facilitated approach is one such strategy that a learning group might employ. From her review of research on teachers’ learning groups, Stanley (2011) summarises that when members’ roles, such as that of facilitator, note taker and questioner are fluid and no one is expected to constantly play the expert, power is equalised within the group. I would argue here that minimised is perhaps a more apt term to use than equalised, as I am unconvinced that power can ever be completely equalised. In spite of this, Stanley’s claim that this type of democratic structure enables teachers to feel more invested in the learning process and experience a greater sense of ownership is strong. There is no reason at this stage to suspect that the data generated by this research contradicts Stanley’s findings. However, this study’s consideration of self-facilitated, professional learning in another field is undertaken with a view to determining its efficacy for more generalised application, given the paucity of evidence outside of the teaching profession.
2.5.iii Agency

Thus far, much of the discussion in this thesis has assumed that individuals make choices about what they do and how they act: that they are agents who can proactively influence their own learning. As Burr (2003) warns, there is a ‘real danger that we can become paralysed by the view that individual people can really do nothing to change themselves or the world’ (ibid:122). Consequently, it is accepted that individuals, as actors in a ‘moral universe’ and where circumstances allow, are able to critically analyse ‘the discourses that frame their lives, and to claim or resist them’ (ibid).

Emphasising the centrality of language, Burr refers to the ‘dialectical process’ (ibid: 186) that underpins the symbiotic relationship between individuals and the society in which they live their lives. Rather than seeing the individual and society as conflicting entities, this symbiosis allows us to think of individuals as agents that are actively involved in the construction of the social world. At the same time, our lives and our behaviours are shaped by whatever societal, cultural, historical and relational circumstances we are born into. This position is further endorsed by Biesta and Tedder (2007) who suggest that the Kantian, individualistic notion of agency must be considered alongside critical approaches that also emphasise the symbiotic relationship between the individual and society. Rather than thinking of agency as power, they look upon it as achievement which acknowledges its dependency on 'the availability of economic, cultural and social resources within a particular ecology', (ibid:137). Bearing this in mind, their brief description of agency from a life-course perspective is given as ‘the ability to exert control over and give direction to one's life’, (ibid:134).

The achievement of agency will always be situated and an outcome of the coming together of the efforts of the individual, his or her context and any structural factors at play such as gender or class. ‘Our action is always in the world’ (Jarvis, 2006:5). Accepting that people are capable of taking action and adopting beliefs for their own reasons also acknowledges that they are able to transform the social contexts in which they are situated (Bevir and Rhodes, 2005).
If ‘the very notion of collaboration depends on individual agency or intention’, (Schwartz, 1998:201), and agency is central to learning in small groups (Schwartz, 1998), agency clearly has relevance for this investigation and is implicitly indicated in terms such as self-direction and self-facilitation.

2.5.iv Developing professional practice

Making use of learning from any environment to transform practice in the workplace is not a straightforward undertaking. But, if the efficacy of self-directed, self-facilitated groups is argued in respect of achieving transformative, professional learning, evidence of the continuing development of practice can substantiate this claim.

Eraut describes five interrelated stages in the process of transferring learning to practice:

- the extraction of potentially relevant knowledge from the context(s) of its acquisition and previous use
- understanding the new situation – a process that often depends on informal social learning
- recognising what knowledge and skills are relevant
- transforming them to fit the new situation
- integrating them with other knowledge and skills in order to think/act/communicate in the new situation (Eraut, 2004:256).

If individuals enter into learning with the express purpose of improving their practice (which necessarily entails enacting new knowledge), participating in a learning activity is surely not enough to guarantee that this will happen. Attention must be paid to all of the above stages; even then I would suggest that there is still no guarantee. Nevertheless, if the members of a learning group recognise the significance of these stages and the implications for themselves, they can at least increase the likelihood of improving their own practice as a result of their participation. Eraut (2004) goes on to advocate dynamic models for the interpretation and integration of new skills and knowledge that recognise and accommodate change over time. He suggests that such models position decision making and planning as ongoing activities, rather than static occurrences that take
place at the beginning of a period. The longevity of the Group affords a unique opportunity to investigate one such dynamic model over an extended period of time.

2.6. Question 4: What are the implications and outcomes for participants as a result of their long-term group membership?

2.6.i Outcomes for participants

Given the limited research on the outcomes of prolonged participation in collaborative peer learning groups and, particularly, the absence of longitudinal studies (McCormack and West, 2006), this section will be brief. Indeed, it is anticipated that of the questions posed in this study, the data relating to this one will be most significant in contributing new insights to the existing body of literature. Quinlan (1999) notes that....

‘peer relationships with other women play an important role in providing emotional, psychological and social support that is so vital to survival in male-dominated workplaces’, (ibid:36).

Studies examining the value of self-directed learning, collaborative learning and facilitated group mentoring for women support this conclusion (see, for example, McCormack and West, 2006; Rager, 2007; Wasburn, 2007,) and it will be remembered from Chapter 1 that seeking such support from a group of peers was a key driver for forming the Group. McCormack and West’s case study investigates a women’s group mentoring programme of one year’s duration that focuses on self-development in what they describe as the ‘gendered culture of university workplaces’, (McCormack and West, 2006:410). The stated aims of the programme are:

- to foster the development of knowledge and skills
- to foster greater professional autonomy and confidence
- to develop professional networks
- to provide women with career development and training opportunities to facilitate advancement (ibid:412)
Facilitators are used for the programme and participants occupy both academic and professional services roles in an Australian university. Despite the differences between groups in this programme and the Group (such as length of membership, the use of a facilitator, a common employer,) as far as stated aims are concerned, there is a significant overlap with those of the Group at its outset.

McCormack and West’s findings reveal that 63% of women reported career enhancement (for example, role advancement or promotion,) following participation in the scheme. The development of skill, expertise and work-related knowledge accompanied by an ‘increased understanding of themselves’ (ibid:422) led to increased confidence which subsequently led to an increase in their contributions and active participation in the workplace. Accompanying this, McCormack and West report an increased sense of belonging and connections. The self-directing process employed for the programme (in this instance, self-direction constituted group members choosing the discussion content of meetings,) was appreciated. Participation also facilitated ‘friendship, enjoyment, guidance, nurturing, advice, job-related feedback, information and insight’, (ibid: 424).

McCormack and West (2006) conclude that non-hierarchical relationships encourage and enable participation in such groups which, in turn, facilitates career enhancement. Whilst I would question whether groups in which appointed facilitators are present can be described as non-hierarchical, it will be interesting to compare McCormack and West’s findings with those of this investigation into a much longer-lived group.

2.6.ii Implications for practice

In the world of staff and personal development (a world in which all members of the Group have been immersed,) evaluating training, coaching or other interventions is frequently problematic, as is the case for adult learning generally when qualifications are not involved. How can the outcomes be measured when even the most sophisticated models for doing so struggle to identify all of the complex interactions involved (Schuller and Watson, 2009)? If the outcomes of learning that involves gaining qualifications are evaluated through the achievement of those qualifications, comprehensive data are available to look at.
Whilst such data might be limited in depth and does not account for the complexities involved in learning, it is easily accessible and available to researchers. As Schuller and Watson (2009) observe,

‘drunks look for keys under lampposts; researchers naturally select the areas where data is available, or where it is relatively easy to gather’, (ibid:30).

Schuller and Watson declare that no slight to researchers is intended in this analogy; they use it to emphasise that knowledge of the effects of learning is variable, depending on the accessibility of data that can be analysed. For those participating in adult and professional learning, what they might be experiencing in other aspects of their lives makes isolating the effects of learning even more challenging. In his discussion of the use of collaborative learning projects within formal education, Dillenbourg (1999) considers measurement of the impact of learning on task performance or practice. He concludes that if collaborative learning is utilised in a range of contexts and incorporates a number of different interactions, it is meaningless to talk about effects in general terms and better to use specific examples. This study provides such an example and particularly focuses on the implications and outcomes for participants of the Group as a result of their long-term membership.

2.7 Question 5: If successful learning groups are defined as those in which participants continue to achieve their learning goals, why are some groups successful and others not and what enables ‘success’ to be sustained?

Question 2 is concerned with sustaining the engagement and participation of individuals in learning groups in broad terms and goes beyond achieving learning goals. Indeed, as highlighted in sections 2.6.i and 2.6.ii, for some participants in learning groups the achievement of learning goals may not be the only indication of ‘success’: for example, establishing connections, achieving a sense of belonging and feeling supported may be equally important to group participants and also indicative of success.

The emphasis here in Question 5 is on why entire groups remain intact (rather than why individuals remain engaged). This question, then, considers why some
groups work and, conversely, why some groups do not. It primarily looks at what enables groups to stay together in order to address the learning goals that they set out to achieve, whether clearly specified or vague.

Regardless of the potential and advantages of learning in groups, discussed earlier in this chapter, not all groups are successful or remain intact long enough to achieve their intended objectives or purpose. Lizzio and Wilson (2005) articulate success as the achievement of satisfaction and high quality educational outcomes by and for group members. Fiechtner and Davis (1992) use a similar definition of success in their exploration of why some groups fail. These two investigations into students’ experiences with and perceptions of learning groups are amongst many conducted in higher and secondary education. It is easy to speculate that this is because data is accessible in these environments; another case of ‘drunks looking for keys under lampposts’ (Schuller and Watson, 2009:30). In this case though, the findings are also likely to have direct relevance to educational practice when there is an emphasis on research-informed practice and/or if researchers are also employed as educators.

As far as self-directed, self-facilitated groups are concerned, little attention has been paid to why learning groups succeed or fail. Whilst this indicates a gap in the literature, it is perhaps unsurprising. After all, who has a vested interest in researching such groups? Nevertheless, my own and colleagues’ anecdotal experience provides a wealth of stories about groups that have failed; coming to an abrupt end or fizzling out before barely leaving the starting blocks. In contrast, the Group has remained intact over a long period of time and appears to work; does that make it successful using Lizio and Wilson’s definition above?

2.7.i A model for group formation

At the risk of stating the obvious, learning groups that are successful tend to be collaborative, whether or not an external facilitator is involved. They are organised around shared goals and with the intention of developing knowledge that is important to their particular members (Stanley, 2011).
In collaborative learning situations, certain expected interactions are assumed to ‘trigger learning mechanisms’, (Dillenbourg, 1999:7). However, bringing people together does not necessarily result in these expected interactions and, for learning to happen, individuals need to feel less threatened by entering the unknown than they do by being in a position where they are not learning (Segers and De Greef, 2011). Dillenbourg (1999) identifies four activities that are likely to increase the probability of interactions occurring that will result in learning. Although his discussion focuses on facilitating collaborative learning within formal educational settings, the same considerations appear relevant to any collaborative learning forum.

Firstly, it is important to establish the conditions that will foster collaborative learning which Dillenbourg (1999) concludes is a difficult task. ‘Symmetry’ (ibid: 9) of knowledge, status and actions between group members should be aimed for which Dillenbourg acknowledges is practically impossible to achieve, particularly in respect of knowledge. Nevertheless, he advocates slight rather than significant asymmetry and proposes that the similarities or differences between group members and issues such as the size of the group and the extent of individual experience, knowing and understanding all need to be addressed. Secondly, a role-focused, collaborative contract should be agreed by group members with individuals taking on specific roles within the group. Thirdly, Dillenbourg argues that ‘in order to scaffold productive interactions’ educators should specify the ‘interaction rules’ (ibid:8) that groups are expected to agree and adhere to. Finally, the necessity of monitoring and regulating interactions is stressed and, in the classroom, this responsibility rests with the teacher. For groups outside formal educational settings, where an educator is absent, I would argue that it is even more critical to undertake these activities, given that there is no one else scaffolding, monitoring or regulating the productive interactions to which Dillenbourg refers.

All four of the above considerations were explicitly addressed by the Group at its formation and have since been regularly revisited. Conversations about the Group’s composition were instigated by its initiator before the Group’s first meeting. During formational discussions at the Group’s first meeting, interaction
rules or ground rules were established; roles (chair and scribe) were identified and
the rotation of these roles was agreed. This more flexible approach to role
ownership deviates from Dillenbourg’s model and more closely resonates with
that advocated by Rosenwasser (2002) for collaborative inquiry groups. She
particularly argues that a non-hierarchical process in which all members take
some responsibility for leading should be aimed for. An initiator of collaborative
groups must “turn over” the group to the group’ (ibid:60) and model openness
and egalitarian behaviours if egalitarianism is their intention. The initiator of the
Group took this approach and the consequences of doing so are explored in
Chapter 5, along with the implications of employing a model that somewhat
resembles Dillenbourg’s in a self-facilitated learning group.

2.7.ii Grounding and more on symmetry

For a group of professionals, it is likely that their profession or their shared
identification with a specific profession contributes to the symmetry between
group members. It enables them to view their membership as a ‘joint enterprise’ in
which they can enjoy ‘mutual engagement’ with a ‘shared repertoire’ (Wenger,
1998:72), all lending a sense of coherence and alignment to a group. Similarly,
Baker et al (1999) highlight that ...

‘a common ground of mutual understanding, knowledge, beliefs,
assumptions, pre-suppositions, and so on, has been claimed to be
necessary for many aspects of communication and collaboration’ [and
describe] ‘grounding’ [as] ‘the process by which agents augment and
maintain such a common ground’, (ibid:33).

Grounding includes but goes beyond the more mechanistic but still important
aspects of group size, format and structure. It facilitates alignment and the
reciprocal understanding emphasised by Littleton and Hakkinen (1999).
Importantly for learning groups, it makes different perspectives explicit: if we wish
to initiate learning for ourselves, our perspective on it matters. Wenger (2009)
implies that in order for people to take responsibility for their learning and
minimise any unwanted ramifications of doing so, it is imperative to ‘reflect on the
perspectives that inform our enterprises’, (ibid:214). This aspect of grounding
during a group’s formation is perhaps under-emphasised in Dillenbourg’s model
and deserves more prominence, as does the negotiation of power relationships
and the competing interests that are sometimes enacted in, and can complicate, situations where there is an aim to explore practice.

Learning that relies on discourse and understanding others’ meaning may be somewhat more complex and challenging than it first appears (Mezirow, 2009). Because culturally embedded language and social practices are influential in constructing learning, understanding and meaning will be both facilitated and inhibited by the knowledge-power networks in which they are rooted (Mezirow, 2000). Meaning is likely to be construed by individuals in ways that reflect their own personal curriculum and experiences. Collaboration implies ‘doing something together’ which, when applied to learning groups, in turn infers ‘synchronous communication’ (Dillenbourg, 1999:12). In other words, symmetry is required and the reciprocation of openly sharing with and listening to each other. Minimising asymmetry (Dillenbourg, 1999), in all its guises, and adopting a robust approach to grounding (Baker et al, 1999) may be helpful, but even when there is explicit acceptance of multiple ways of knowing and that there are no right answers, acting this out authentically within a group so that there is genuine alignment may still present a challenge for some participants, perhaps at levels of which they are unaware (Billet, 2011).

The relevance of symmetry is echoed in Lizio and Wilson’s (2005) paper. They summarise issues identified by students in a number of studies which focus on self-managed learning, noting that a lack of equity in workload distribution, relationships and social exchanges emerges as problematic. The diversity of group members also emerges as problematic as does interpersonal conflict which, interestingly, is inversely associated with group learning. On the one hand, greater interpersonal conflict appears to facilitate an increase in group learning but, on the other hand, this is not likely to be sustained; it does not help groups to remain intact. Unsurprisingly, Lizio and Wilson conclude that both interpersonal trust and acceptance are necessary for the effective management of the diversity and differences in groups. They further note that ....

‘cohesiveness, which ensues from members trusting and being committed to one another, is not only associated with psychological outcomes (such as members’ perceptions of openness and safety) but
also has practical educational outcomes for interactive learning designs, (Lizio and Wilson, 2005:375).

Although Lizio and Wilson are referring to the design of interactive learning in educator-led settings, again I would suggest that there is some relevance for self-facilitated groups. A cyclical, four-stage model for professional development groups of up to twelve peers, offered by Heron (2009), goes some way towards addressing both grounding and the points raised by Lizio and Wilson. Heron suggests that a group initially enters a nourishing, emotional mode during which members experience positive encounters. Tensions between group members are dealt with as are those that individuals might experience in anticipation of some aspect of the process to be encountered. Next, data and experiences are shared and reflected on together to achieve deeper understanding of both: the implications for and revisions to practice are considered. The third stage involves active and conscious imagining of practising in the future, incorporating the new knowledge and understanding that has been constructed during the previous stage. Finally, the imaginings are converted into action as group members return to practice. After an appropriate period of practice the group reunites to begin a further cycle.

Heron’s model more thoroughly addresses aspects of grounding relating to individual perspectives, power relationships and competing interests than does Dillenbourg’s (see previous section). Whilst it does not incorporate group composition and process, already identified as important during grounding, Heron’s model does extend beyond a group’s formation and marks out a route for applying learning during future practice and for group continuation. It is relevant to the successful achievement of practice-related learning goals and it is relevant to sustaining a group’s success in doing so.

In summary, despite the limited literature relating to self-facilitated, professional learning groups, several themes emerge that can be usefully explored and, potentially, further developed through the data generated by this investigation. There are many group-working models offered as guidance for educators and facilitators (see Downs, 2009; Edmunds and Brown, 2010; Armstrong, 2004; Hollins, 2004 and Oakley et al, 2004) and, although those offered by both Dillenbourg (1999) and Heron (2009) provide frameworks for discussion in this
thesis, the relevance of other models is not discounted at this stage. Symmetry (Dillenbourg, 1999) is revisited in Chapter 5 and grounding (Baker et al., 1999) is a term that might be usefully appropriated and developed to include any further formational activities that contribute to a group's success, indicated by this study. Similarly, the Group's own cyclical process can be considered alongside that advocated by Heron in relation to a group's success with learning goals. The Group has certainly remained intact over a long period of time and, if described as one that works, understanding something of what has enabled it to work will contribute to the discussion on sustaining professional development and, potentially, to collaborative learning in general.

2.8 Chapter summary

The purpose of this chapter is to summarise and critically analyse current thinking and concepts that are relevant to my own research, establishing a platform from which to refine my ideas and proceed. After highlighting the centrality of learning to this investigation and undertaking the preliminary task of discussing and clarifying the intended meaning of learning-related terminology, each section of the chapter has addressed one of the five questions posed in this study. Ideas emerging from the literature have been pin-pointed for consideration and further discussion in Chapter 5 alongside the data emerging through this research. Gaps in the literature have also been highlighted, particularly those that this study might go some way towards addressing. Finally, it should be noted that the available, peer-reviewed literature referred to in this chapter is mostly confined to research conducted in higher education (looking at students or staff), other educational or organisational settings, or situations in which there is an appointed educator or facilitator. This, I believe, further strengthens the case for researching an independent, self-facilitated, collaborative learning group.
3.1 Preamble


Taking a cue from Crotty, this chapter aims to provide a critical account of the theoretical perspectives that underpin the chosen methodology and methods for this study, which will also be described and justified. Whilst I aim to be thorough and bring understanding in the following pages, it seems increasingly evident that there is a certain amount of complexity and ‘mess’ that any amount of clarity is unlikely to dispel.

As Hammersley points out,

‘There is a baffling array of different approaches’ [in educational research .... and] ‘we have a large and complex field in which work of sharply different kinds is carried out, accompanied by debates in which a disparate collection of theoretical and methodological labels and ideas are employed’, (Hammersley, 2012:1).

In the initial proposal for this research, the desire to offer a straightforward account of my own ontological and epistemological positions, the associated theoretical perspectives and corresponding intended methodologies and methods for this study were mentioned. The difficulties experienced in doing so at that stage were also mentioned, as was the recognition that the more I read about social and educational research, the more complex it appeared. Acknowledging the need to remain sensitive ‘to the complex, messy and quirky qualities of social methods’, Staunaes and Krojer (2008:1) suggest that this complexity also needs to inhabit our writing about social research.

Given my involvement in other post-graduate research, this has not been an enterprise where I have started from scratch, but strategies previously employed
have not proved adequate for this project. When trying to get to grips with concepts, theories or models in the past, my approach has been to keep reading until something emerges that strikes a chord and leads to some kind of enlightenment that has taken me forwards. In this instance, what has emerged from a much more thorough investigation of relevant literature than I have previously undertaken, is a plethora of descriptions and interpretations of the many isms and ologies applied and employed in research. This is accompanied by a conspicuous lack of consistency and agreement between writers in respect of definitions, interpretations and meaning. Methodological literature appears to have reached a stage of ‘truly unmanageable proportions’ (Agar, cited in Hillyard, 2010:768) and despite attempts to produce typologies, it is impossible to locate definitive lists of research paradigms and methodologies with which there is universal agreement (Hammersley, 2012).

After completing my master’s degree I felt fairly confident of my understanding of different research perspectives. In undertaking my doctoral research, that confidence was replaced by confusion and frustration for a time, until I aligned myself with the pragmatic paradigm. Embracing pragmatism and employing it throughout the entire research process helped me to negotiate the contradictory typologies and complexity with which I was faced. Hence, rather than being drawn into a lengthy debate about who or what is right or wrong, the focus could be on what is most relevant for this study and what could be made use of. As far as methodology is concerned, it has seemed prudent to accept that complexity and clarity need not be positioned as opposites or constitute a dualism, and to tentatively argue that both will need to be present and used to achieve the aims of this chapter, as described above. The clearly delineated philosophical foundations and corresponding, neatly packaged methodology and methods that I had initially envisioned now seem to be a somewhat naïve ambition. The particular enlightenment that I experienced from my reading on this occasion was that if those deemed to be great thinkers of our own and earlier times could not agree on so many different points relating to truth, reality and meaning, the job before me was to navigate my own route. Whilst I might make use of the signs provided by these great thinkers, welcome challenges from others to my route choice and remain open to advice and suggestions, ultimately the course to be steered has
been and will be determined and decided by my research questions. Retaining the sea-faring metaphor, the challenge was and is to chart the route in a way that ensures transparency and accessibility to others. Otherwise, from a pragmatic perspective, what would be the point?

This chapter, then, will firstly describe and discuss the underpinning theoretical perspectives for the study, eventually bringing together pragmatism and a participative approach to research design. As already implied, there is no standardisation of meaning for these labels (Hammersley, 2012). Further, Bernstein (2010) suggests that *isms* are often used carelessly, assuming that others will understand the meaning of the user. In an attempt to avoid such assumptions, as mentioned in Chapter 1, I continue in this chapter to do what I can to make clear *my* meaning. In doing so, my own paradigm (set of beliefs) that regulates this investigation (Bunniss and Kelly, 2010) becomes apparent. I then go on to align these perspectives with the chosen case study methodology, providing a rationale for adopting this approach and explaining what this choice entails. Given the use of a participative approach, the corresponding choice of methods for data collection is also explained and justified. Finally, the ethical implications associated with this research are explored and addressed.

3.2 A Paradigmatic Starting Point

‘Who do you think you are? And what do you think you are doing?’
(McCormack, 2008:837)

McCormack poses these questions to himself in the pursuit of his own doctoral studies and goes on to address them in his published preface to his final thesis. They strongly resonated with what I was asking myself as I set out to clarify my own thinking and to locate a starting point for this chapter and, indeed, for this study. Research methodology is not just about methods of data collection; methodology necessarily attends to the philosophical beliefs and assumptions about truth, reality and being that underpin any research design, consciously or otherwise (Bunniss and Kelly, 2010; Clark, 1998). Holst (2009) argues that ‘social scientists cannot allow themselves to be philosophically ignorant’ (ibid: 313). Further, the philosophical categorisation of research methods is the most
fundamental level at which they can be described (Clark, 1998). In talking about their research, the language used by researchers to describe and justify the validity of their findings, and the analysis of the same, reveals their own ontological and epistemological position which cannot be assumed to correspond with that of their peers. It is, therefore, an imperative that social scientists are philosophically informed and understand the implications of making claims to know or to be providing interpretations, explanations or descriptions, for example, that are robust, representative, predictions or otherwise (Holst, 2009). Ontologically, we need to ask what the form and nature of reality are and, consequently, what can be known about it. Epistemologically, we need to question the relationship between the knower (or aspiring knower) and what can be known. And from a methodological perspective, we should ask how the would-be knower, the researcher, can approach finding out whatever s/he believes can be known about (Heron and Reason, 1997).

So, back to McCormack’s questions - who do I think I am and what am I trying to do? Heron and Reason (1997) suggest that whilst paradigms or worldviews provide the frameworks that underpin the approach we take to 'being in the world' (ibid:274), they extend beyond cognitive understanding. ‘You can divorce thought from action [but] you cannot divorce action in the world from thought’ (ibid:281). Providing a response to McCormack’s second question by explaining and justifying my thoughts and subsequent actions in respect of the approach taken to this investigation is, as I see it, my remit for this chapter. I believe this will also lead to addressing the ontological, epistemological and methodological questions articulated above.

As regards who I am, for this study I am an aspiring knower, engaged in a professional doctorate in education and the instigator of this particular piece of research. I am also a subject or participant alongside the other participants in the Group at the centre of the study. Co-existing, overlapping and brushing against these labels are others that hold sway, depending on the activity or role that I am engaged in.
3.3 What am I trying to do?

3.3.i A pragmatic approach

‘Researchers must be competent in and free to use (or try to use) whatever ... techniques best fit their own epistemological preferences, the phenomena they wish to understand’ ...and... ‘the goals and resources they and their co-participants have’, (Chester, 1991:766).

Chester describes the foundations of a pragmatic approach to research and, as already inferred, the same principles that have been adopted for this study. However, this statement does not articulate the philosophical foundations that underpin its apparent flexibility and un-rooted nature. If, as a researcher, I am to comply with Holst’s (2009) recommendation to avoid philosophical ignorance, it seems important to attempt such an articulation before providing an account of what I am trying to do. So, what is pragmatism and from whence does it come? Briefly, its origins are generally associated with three Americans with varied backgrounds writing in the mid to late 1800s – Charles Sanders Pierce (1839-1914), William James (1842-1910) and John Dewey (1859-1952) – drawing on a rich and diverse collection of philosophical traditions (Bernstein, 2010). It was the first philosophical school of thought to emerge from the United States of America, though extensively influenced by European thinking (Biesta and Burbules, 2003). Having fallen out of favour somewhat during a significant part of the twentieth century, pragmatism has enjoyed a resurgence over the past few decades (ibid).

A growing interest has developed in the work of both classical pragmatists and the more recent philosophers identifying themselves as pragmatists, such as Richard Rorty and Hilary Putnam (Bernstein, 2010). However, as with other isms, there are many different versions of pragmatism (Biesta and Burbules, 2003) and there are and have been many people who agree with certain elements of pragmatic thinking that would not call themselves pragmatists (Bernstein, 2010). Nevertheless, there are consistent themes that emerge which include an aversion to the traditional, positivist view of the ‘existence of an objective reality, independent of the knower’, (Clark, 1998:1243), and the notion of fixed absolutes that research can discover. There is also a rejection of dualisms such as the positioning of quantitative and qualitative methodologies in opposition to each other; methods are chosen for their ability to answer the research question (ibid).
The focus is on use, usefulness and practical consequences (Cohen et al, 2011; Denscombe, 2007).

Pragmatism asserts that arguments about the nature of truth are of no consequence and that what is important to consider and debate are those things that are of consequence (Bernstein, 2010; Baert, 2005). In other words, pragmatism is concerned with that which has practical, moral or social application or use (Giacobbi et al, 2005), for whatever or whoever may be associated with the issue in question. It is tied to felt difficulties experienced by the researcher or perceived as experienced by others and adopts a problem-solving approach (Cohen et al, 2011), the results of which others can draw on in their own practice and for their own enquiries (Floden, 2009). From my perspective then, Rorty articulates some important questions to be asked in respect of this study (or indeed, any undertaking.)....

‘s’suppose you’re a pragmatist about truth – i.e. you think that truth is what works. The obvious question, then, is: whom does it work for? You then ask political questions about whom you want it to work for, whom you want to run things, whom you want to do good to’, (Rorty in O’Shea, 1995:60).

What I am trying to do through this investigation is to focus on what works for one specific, self-facilitating learning group with the intention of understanding more about why it works, why it has worked for so long and what impact its longevity has on both the Group and the individual members. I am not particularly comfortable with the notion of wanting to ‘do good to’ (ibid); it seems to infer that passive recipients are waiting somewhere to be done to. Given the centrality of self-facilitation for the Group, pro-activity and energetic initiative would appear to be more apt than passivity. What I hope emerges from this study, then, is something useful to be taken or taken up by others, rather than done to them. My pragmatic reality aligns with Brinkman and Kvale’s (2005) assertion that being truthful and applying practical wisdom (‘the skill of clear perception and judgement’, ibid:175) is more important than absolute truths and theoretical understanding.

Thomas (2002) debates the positioning and value of theory in qualitative educational research, noting that the term is used to denote ....
‘many and varied intellectual constructions and heuristics: systems of evolving explanation, personal reflections, orienting principles, epistemological presuppositions, developed arguments, craft knowledge and more’, (ibid:420).

Given a lack of explanation as to why theory is needed and the ‘poverty of reasoning around theory’ (ibid:429), Thomas goes on to question why scholars should want to develop theory from qualitative inquiry. He suspects that it is because of its ‘epistemological cachet’ (ibid:421), something that academics are unable to resist and which dictates that any inquiry that does not produce a theory is somehow inadequate. Thomas is critical of Hammersley’s (1992) suggestion that the aim of qualitative educational inquiry should be the production of models rather than theories. He argues that this does not address the issue but just replaces one term with another that also relies on the quality of data generated by an inquiry and its subsequent analysis.

So, why is this relevant to what I am trying to do in my research? I have been reluctant since beginning this inquiry to make claims to developing a theory for learning in groups, professional development, self-facilitation or sustainable learning, largely because I do not believe that there is a right way to do it or a truth to be discovered about any of these things. What I hope to do is to represent what works in one, specific situation, with the involvement of all of those participating in that situation, to ensure that I avoid, as far as possible …

‘the intellectualist and theoreticist fallacy which takes the form of the epistemocratic claim that “I know better than my informant”’, (Bourdieu, in Wacquant, 1989:34).

Any theorising in this thesis therefore represents one way of organising what can be thought and said about professional learning in a self-facilitated group that is sustainable, with the intention of developing understanding. At the end of this investigation, others can make their own decisions about what, if anything, might be relevant for them (further discussion of this ensues in section 3.5.ii). My suspicion is that it will be others with a pragmatic view of the world that will find it useful.
A final footnote on pragmatism (and one that I think is important with regards to what I am trying to do here,) is that ....

‘Pragmatism is not an ‘anything goes’ sloppy, unprincipled approach; it has its own standards of rigour, and these are that research must answer the research questions and deliver useful answers’, (Cohen at al, 2011:23).

In essence, this is what I am trying to do.

3.3.ii Other “isms”

In attempting to distinguish pragmatism from other research positions, I am mindful of Hammersley's warning to avoid ‘mis-description and significant omission', and of the dangers of ‘presenting the differences [between research typologies] as clearer and more fixed than they actually are’, (Hammersley, 2012, appendix 3:2). Although aiming to make clear my own meaning as succinctly as possible of the terminology used herein, it is likely that Hammersley's criteria for thoroughness will not be achieved. Given the scope of this study, omission seems unavoidable. However, as inferred earlier, complexity is acknowledged without reservation, and since I am only offering interpretations of the terminology in so far as those interpretations have been used in this study, the danger of mis-description hardly seems relevant.

In recent years the debate about what educational researchers should do has been continuous and ....

‘the settled and comfortable times for educational researchers, when empiricism dominated our thoughts, are no longer available to us’, (Smith and Hodkinson, 2002:295).

The ‘empiricism’ referred to here is that usually associated with data generated from observable findings that can be replicated and used to formulate predictions (Clark, 1998; Cohen et al, 2011; Hammersley, 2012), generally favoured by policy makers (Price, 2008). Further references to empiricism herein assume a strong correlation with positivism and quantitative data (Clark, 1998). By positivism I mean an insistence that infallible laws can be discovered and established through detached, objective inquiry conducted by impartial researchers (Onwuegbuzie,
Although it is evident what positivism has contributed to scientific knowledge in respect of the natural sciences, its success is less evident in the study of human behaviour (Cohen et al, 2011). Adopting a pragmatic approach for this study as a researcher investigating human behaviour, I rejected positivism as not fit for purpose in addressing the research questions posed.

Interpretivism is frequently positioned in opposition to positivism (Fisher, 2007; Rowbottom and Aiston, 2006). It avoids concentrating on the formulation of rules and laws: instead, the focus is on meanings, discourses and beliefs. Interpretivists hold that people in any given situation will interpret it in innumerable ways that can only be understood by grasping the beliefs behind the interpretations (Bevir and Rhodes, 2005). A constructionist epistemology is adopted and the focus is on developing understanding with an acceptance that there is no one truth (Bunniss and Kelly, 2010). The perspective of the researcher or inquirer must therefore be explicitly acknowledged and taken into account with any knowledge that is generated (Dean et al, 2006). Further, interpretivism accepts a distinction between the physical world and the social world. The social world is constructed, as may be the physical world as long as there is a social world, but there is a distinction between the two. If human beings were destroyed the physical world would remain but the social world would come to an end, as would the attachment of meaning to the physical world that is contingent upon it (Smith and Hodkinson, 2002).

Whilst ‘interpretivism consists of a diverse cluster of traditions’ (Bevir and Rhodes, 2005:173), the themes mentioned above are reasonably consistent. At the same time, interpretive notions such as the need for reflexivity and recognition of the central position of values in social research are also identified with pragmatism (Floden, 2009). Indeed, the pragmatic approach adopted for this investigation is chiefly interpretive in nature since, in my view, this enables the research questions to be addressed most effectively. However, the usual interpretive aim of developing understanding rather than achieving an explanation (Bevir and Rhodes, 2005) does not go far enough. Once an understanding is reached I want to be able to make use of it and invite others to do the same by sharing, vicariously, the Group’s experience, and doing their own theorising or experimenting.
Positivist and interpretivist perspectives are frequently positioned as polar opposites (for example, see Cohen et al, 2011), and there are ‘academic snipers, from all camps, which are in a state of constant low-level warfare with each other’ (Fisher, 2007:56). Rowbottom and Aiston (2006) suggest that ‘educational research has been plagued by dubious bifurcations’ (ibid:137) with that between positivism and interpretivism being the most significant of these. In an attempt to ‘debunk the rhetoric’, Weber (2004:iv) asserts that the discourse around the alleged differences between the two is ‘founded on false assumptions and tenuous arguments’ (ibid:iii). He goes on to argue that both positivists and interpretivists ....

‘seek to improve our shared understanding of the world’ but also ‘appreciate that they bring biases and prejudices to the research they undertake and that the research methods they use have strengths and weaknesses’, (ibid:vi).

This may well be the case but does not address the more fundamental questions relating to truth, reality and researcher objectivity. The adoption of one paradigm or other is not what defines the quality of any research, but the ‘integrity and transparency of the research philosophy and methods’ (Bunniss and Kelly, 2010:357). Bevir and Rhodes (2005) appear to agree with this when they suggest that interpretivism does not dictate a specific approach to data gathering, for instance, but ‘prescribes a particular way of treating data of any type’ (ibid:178). Weber (2004) and others (Onwuegbuzie, 2002; Giacobbi et al, 2005) conclude that it is time to reject the positioning of positivism and interpretivism as polar opposites and, instead, recognise that researchers adopting either approach can be reflexive and produce justifiable, high quality research....

‘... excellent researchers simply choose a research method that fits their purposes and get on with the business of doing their research’, (Weber, 2004:xi).

This practical approach to research does not imply mixing up philosophical positions whilst analysing the meaning of data (Bevir and Rhodes, 2005) but might include mixing qualitative and quantitative methods (Gelo et al, 2008), which is not the same thing. It is an approach that strongly resonates with that proposed by the protagonists of pragmatism (Giacobbi et al, 2005; Chester, 1991). However, the essential difference between Weber’s view of the world (as a self-declared positivist,) and a pragmatist’s view lies in the assumption that questions of truth
and objectivity are worth arguing about. As Rorty (in O'Shea, 1995) points out, bookshelves are laden with philosophical publications that continue the truth debate, but to what end other than gathering dust? Clark (1998) provides a pragmatic way forward, suggesting that coherence (regarding views of truth) is necessary and that claims to knowledge should be judged in the context of rational communities, thus providing guidance regarding what can be trusted and has practical application. Floden (2009) proposes that such knowledge is intersubjective and emerges as shared meanings through dialogue. \textit{Facts} are therefore statements with which almost all members of a given community would agree (Bevir and Rhodes, 2005). It is with this in mind and a desire to speak \textit{alongside} rather than \textit{for} the other Group members that I decided to use a participative approach for this study. This was a pragmatic decision; it seemed obvious to me that adopting this approach would go beyond providing an interpretive understanding of the Group that relied on my perspective alone. Not only would the answers to the research questions be strengthened, they would also be more convincing and balanced, and consequently, more ‘useful’ (Cohen et al, 2011:23) to others.

A more detailed discussion of participative methodology follows but, before moving on, I would like to acknowledge the brevity of this section. It is not possible or, in my view, particularly helpful to discuss here the many other isms, perspectives and approaches that are employed in social research. The aims of this section are to position my chosen pragmatic approach and to make my own understanding and meaning clear.

3.4 A Participative Investigation

As already indicated, the selection of a participative approach reflects both my own learning ideology and the democratic functioning of the Group. Participatory research (PR) largely emerged ‘in response to the dominance of the positivist paradigm’ (Van der Riet and Boettiger, 2009:1) and ‘resists the process of objectification’ (Price, 2008:387). Heron and Reason (1997) also suggest that...

‘mainline qualitative research has not grasped the right of informants to participate in formulating the research design so that they can manifest
Choosing a participative approach for this investigation has been an attempt to ensure that the values of Group members, both past and present, have held sway not just in respect of how data should be generated about them, but also how it would be analysed and written about. Central to PR is the emphasis that it is *with* people rather than *about* them (Seale, 2010), thus altering the hierarchy and associated power dynamics in the researcher-participant relationship (Van der Riet and Boettiger, 2009). Unlike traditional research approaches, PR is explicit about issues of power in the investigative process and seeks to address these (ibid). However, addressing power differentials is a messy and complex endeavour and participative researchers have to remain vigilant, continually revisiting power-related issues through reflective dialogue and negotiation (Lyon et al, 2010). Rather than adopting a position that assumes power can be completely eliminated in research relationships, in PR there is recognition of the near impossibility of doing so whilst taking measures to minimise power within those relationships, as far as possible (Powers et al, 2006). In order to remain congruent with a participatory paradigm, it is also important to emphasise that participation itself must remain ‘a choice, not an imposition’ (McIntyre, 2008:15) and researchers need to be mindful of this from the outset, as was I in this study.

Heron and Reason (1997) compare PR with other qualitative approaches and argue that, by and large, qualitative research projects are ‘unilaterally shaped by researchers’ (ibid: 285), regardless of the fact that that shape might be emergent and responsive to participants’ views. Involving participants in developing designs for practice or trialling is not the same as their involvement in designing the research approach itself (Tracy and Carmichael, 2010). PR advocates that everyone involved engages together ‘in democratic dialogue as co-researchers and co-subjects’ (Heron and Reason, 1997:283), making joint decisions throughout a project.

Adopting a democratic approach and attempting to flatten the hierarchy between researcher and participants sits comfortably with pragmatism, particularly Dewey’s version of it as an advocate of democracy (Kellner, 2003). For this study,
adopting a participative approach aligns with both the intention to avoid hierarchy that already exists within the Group, and the practical usefulness that is central to pragmatism and to the Group's raison d'être. Practical knowing rather than propositional knowing is a central aim of PR (Heron and Reason, 1997), which further aligns it with pragmatism.

There are many different forms of PR (ibid) and the extent of participants’ involvement throughout the entire research process seems to vary considerably, as is evident in the literature. The majority of participative studies are located outside of formal, institutional learning (Hodkinson and Macleod, 2010) and a range of methods is used in a variety of different situations with different communities and groups (see, for example, Schafer and Yarwood, 2008; Goh et al, 2009; Dyrness, 2009; Seale, 2010; De La Nueces et al, 2012). What remains consistent in PR is the commitment to attending to issues of power, ensuring inclusivity and enabling those who are normally marginalised, oppressed or disempowered to have a voice, as already indicated (Van der Riet and Boettiger, 2009). Emphasis is generally placed on the participants' identification of the research problems and questions, with a view to ensuring that they consider the research worth doing (Seale, 2010). The researcher's role is to facilitate this through 'questioning, reflecting [and] dialoguing' (McIntyre, 2008:6) within a decision-making process that resists linearity. Instead of linearity, PR aims to get to the nub of responses to research questions through iteration and encompasses a spiral of steps that must be adapted to suit the research project (McIntyre, 2006). Whilst in PR it is important for the researcher to 'hand over the stick' (Van der Riet and Boettiger, 2009:4), s/he retains a facilitative responsibility for that spiral process. Given Group members’ familiarity with facilitation and regular practice of the same in a variety of professional contexts, in this case handing over the stick also meant that the facilitative responsibility was shared rather than resting entirely with me, the researcher. This, I believe, resulted in more robust 'questioning, reflecting [and] dialoguing' (McIntyre, 2008:6) than would otherwise have been the case and, in turn, strengthened the reliability of this study's findings.

The usual association between PR and emancipation is not present in this study; it was never intended to be emancipatory. It did not begin with an idea for a change
intervention with my practice, with the research subjects or with their practice (Saunders et al, 2003). Nor does it share all of the underlying principles found in many PR projects such as reaching ....

‘a joint decision to engage in individual and/or collective action that leads to a useful solution that benefits the people involved’, (McIntyre, 2008:1).

This research was initially prompted by my own curiosity and a belief that the Group is worthy of doctoral investigation (rather than as a result of an initial joint decision). However, recognising the need to avoid imposition and ensure that Group members were choosing to participate, the project only proceeded following a unanimous decision to do so that was eventually reached after in-depth discussion between the Group’s members. Also, whilst it seemed extremely unlikely that participating in this research would not have some impact on the Group, the starting point for the investigation was not to address an internal issue, make changes, or act as an instrument of emancipation. The Group appeared to be functioning well and, over the years, has engaged in reflective debate and undergone numerous iterations to reach its current shape. The Group may have formed because the women members wanted to create their own space in a business world perceived to be dominated by men but, in forming, the Group was taking care of itself and continues to do so. It has its own voice and was not in need of an advocate. However, as will be apparent from the introductory chapter, it is hoped that the findings from this study will be of relevance outside the Group, perhaps offering ideas for groups that feel marginalised in some way and want to take control of their own learning and development.

Taking the above arguments in favour of a participative approach into consideration and recognising the alignment of the consultative and negotiated nature of PR with the Group’s established modus operandi, it is submitted that it offers a more appropriate methodology for this study than any other options considered. A participative approach ensures that both past and present members of the Group are represented as fully as possible, and facilitates the congruency already discussed. At the same time, it strengthens the reliability of the study’s findings, as will be discussed in 3.5.i.
3.5 Data Gathering Methods

In the same way that positivism and quantitative methods are partnered, and interpretivism and qualitative methods are linked, pragmatism is frequently associated with the use of mixed methods (Denscombe, 2007); that is to say, the mixing of qualitative and quantitative data (Onwuegbuzie, 2002). Hodkinson and Macleod (2010) note the appeal of mixed methods for triangulation purposes but highlight that there may be difficult issues around different conceptions of learning and notions of truth, to which some reference has already been made. Clark (1998) argues that identifying ‘methods with particular paradigms may not be as accurate or even as useful an endeavour as past trends would indicate’, (ibid:1243). In her view, such strict categorisation can lead to over simplification and should be challenged: far better to choose methods that are appropriate to respond to the research questions.

Accepting that ‘no single research method is uniformly best’ and that the ‘choice of method should be made with reference to the question being answered’ (Floden, 2009: 490), for this investigation the route seemed clear. Given the intention to use a participative approach, for me to have imposed a set of pre-decided methods would have been entirely inappropriate. Consequently, in order to remain congruent, the choice of methods rested with and was negotiated by the Group, as advocated by McIntyre (2008). Having already participated in a discussion about the ethical considerations and concerns associated with the study (see Appendix 7 for briefing paper, ethics protocol and consent form,) and reached agreement to proceed, Group members were already familiar with the research questions. As the Group considered ‘how best to answer the research questions’ (Clark, 1998:6), it was suggested that we brainstorm ideas with the questions in mind. This resulted in the generation of a flipchart sheet full of possible research methods that might be employed for the study (see Appendix 6). These ideas were then reviewed alongside the questions and, through a process that involved both the elimination of non-feasible ideas and matching methods with questions, the Group decided to use a different method to address each question.

Given that the research methods were both identified and chosen by the Group, no attempt will be made here to justify the methods chosen but the decision-making
process that was adopted for this reflected the iterative, spiral approach discussed in the previous section. The facilitative role, also discussed in the previous section, that I and other Group members embraced during this research tested the *fitness for purpose* of the methods employed (Floden, 2009; Clark, 1998). Through iteration, some amendments and additions were made to the methods that were initially chosen: fuller explanations of what each method entailed and how it was utilised are included in Chapter 4 (4.2.ii). Table 1 (over) indicates the method chosen for each of the research questions.
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<thead>
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<th>Research Questions</th>
<th>Chosen Method</th>
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<tbody>
<tr>
<td>Question 1: What encourages, influences and motivates people to engage with and participate in professional learning groups?</td>
<td>Mind mapping (in two small groups) and then whole group feedback/discussion (to be recorded and transcribed).</td>
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<tr>
<td>Question 2: What sustains this engagement and participation?</td>
<td>Force Field Analysis (whole group activity to identify ‘forces’ pushing for or against, to be recorded and transcribed).</td>
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<tr>
<td>Question 3: What is the efficacy of self-directed or self-facilitated groups in achieving ongoing, transformative, professional learning?</td>
<td>Five Whys? (Asking why? five times to encourage discussion beyond an either-or response to the question,) followed by group discussion (to be recorded and transcribed).</td>
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<td>Question 4: What are the implications and outcomes for participants as a result of their long-term group membership?</td>
<td>Individuals to use images, symbols or metaphors to respond to this question as a starting point for group discussion (to be recorded and transcribed).</td>
</tr>
<tr>
<td>Question 5: If successful learning groups are defined as those in which participants continue to achieve their learning goals, why are some groups successful and others not and what enables “success” to be sustained?</td>
<td>Cultural models and taboos? Group brainstorm and discussion (to be recorded and transcribed).</td>
</tr>
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</table>

Table 1 The research questions and corresponding methods chosen by the Group
In addition to the methods listed above, it was agreed that prior to addressing any of the questions, each Group member would write approximately five hundred words about their own experience of the Group that would be circulated in advance of the next meeting. The purpose of this activity was to serve as a catalyst for our thinking about any or all of the research questions and to generate individual responses.

Finally, it should be mentioned that prior to the Group’s brainstorm on methods, I had contacted the three women who had left the Group and provided them with the written briefing paper for the study already received by current members, (see Appendix 7). After their questions had been answered, all three indicated that they were happy to contribute individually and the initial idea was that I would conduct Skype interviews with each of them. The woman who had emigrated to New Zealand had proved difficult to contact because of a subsequent move to the Cook Islands. This relocation meant that she could only access the internet intermittently and was unable to use Skype. Consequently, she requested a list of questions to which she could respond via email and it was decided to use the same, consistent approach with all three past members (see Appendix 8). Some of the current members agreed that it would be helpful if they also responded to the same open questions in order that past and current members’ responses might be compared.

The provision of open questions for respondents to address on-line can claim some of the strengths accredited to email interviewing. Specifically, it overcomes the geographical barriers to participation of distance and time differences (Roberts, 2011; James and Busher, 2006). It also enables individuals to respond reflexively at their own pace (James, 2007), without being influenced by other people’s responses (Meho, 2006). Like email interviewing, the amount of probing that can be done is limited compared to face to face or virtual questioning (Meho, 2006) and probably more so in this instance, considering the likely absence of iteration between researcher and respondents that email interviewing normally allows. Nevertheless, the use of this approach enabled all Group members, both past and present, to participate in the study and the questions posed were constructed with the research questions and the literature in mind (Fisher, 2007).
In summary then, a number of methods were identified that the Group believed would address the questions posed by the study. These included individual email responses to a list of open-ended questions, individual narrative accounts, group brainstorming, a force-field analysis, mind mapping and the use of images, symbols and metaphors as techniques for thinking and for facilitating discussion: all of the chosen methods but one involved an element of discourse.

The appeal and benefits of utilizing a multi-method approach (Onwuegbuzie, 2002; Hodkinson and Macleod, 2010) have already been highlighted. It is further promoted by Clandinin and Connolly (1990) who point out that ‘a number of different methods of data collection are possible ... in a collaborative relationship’ (ibid:5). Noor (2008) agrees and argues that case study research can be strengthened by combining a number of techniques to elicit data, allowing findings to be confirmed. The Group’s decision to use a variety of methods is therefore not without support, and neither is the notion (also implicitly assumed by the Group,) that in participative research, the views, ideas, perceptions and feelings of the participants need not be limited to the written or spoken word. Staunaes and Krojer (2008) encourage the use of pictures as ‘thinking technology’ (ibid:2) that can stimulate complex conversations and collective meaning-making. Similarly, symbolic representations and physical activities can also serve to generate meaningful data (Van der Riet and Boettiger, 2009) and ‘dramatically impact on the process of join meaning-making’ (Westcott and Littleton, 2005:142). As will be noted in Table 1, the Group opted to use symbolic representations as thinking technology in response to Question 4.

In any event and regardless of whether there is evidence in the literature to support the choice of methods, having decided on a participative methodology for this research, I was committed to using whatever methods that the Group decided on. If one is of the opinion that data gathering methods are epistemologically driven, this approach may seem problematic. However, this is not the case if one accepts (and I do,) that it is not the data gathering but the treatment of the data that is paradigm-dependent (Bevir and Rhodes, 2005). That is not to say that the chosen approach was without challenges and these are described in Chapter 6 and
Appendix 24. An account of how the various methods were employed is included in Chapter 4.

Hodkinson and Macleod (2010) claim that few participatory studies deal adequately with individual learners. When emphasis is placed on collaboration and the collective unit, there is potential for individual differences or interests to be overlooked or suppressed. I believe that the Group is mindful of this potential pitfall when it goes about its *normal* business, as discussed in earlier chapters. This mindfulness is also reflected in the Group’s choice of methods and the inclusion of two individually-oriented approaches to data gathering which go some way to addressing the potential inadequacy highlighted by Hodkinson and Macleod.

### 3.5.1 Reliability

Although the term *reliability* may not yet have been explicitly referred to in this thesis, some aspects of reliability have already been addressed, particularly those associated with the implications of utilising a participative methodology. In addition, the relevance of the results of this enquiry must be positioned in time: both the findings and the conclusions reached will have a life span, as will those emerging from any enquiry (Biesta and Burbules, 2003; Giacobbi, 2005; Floden, 2009). What researchers might discover from similar enquiries in the future may be complementary, contradictory or simply highlight that things have moved on with the passage of time. This investigation is likely to produce different results from those that might have been produced had it been undertaken earlier in the Group’s life span. Given that the Group’s longevity is one of the central themes under scrutiny, some insights into such potential differences, albeit hypothetical, should be surfaced through the study.

Finlay (2006) advocates that researchers should gain the agreement of participants with their own assessment of the data as a way of strengthening studies. The participative approach adopted for this investigation assumes the involvement of Group members throughout the research process and goes beyond Finlay’s recommendation. For example, how ethical considerations were jointly addressed is accounted for later in this chapter and the participative assessment of the data is described in Chapter 4. Further, Group members reviewed each of the
chapters of this thesis to ensure that they felt accurately represented. As Lincoln (1997) argues.....

‘If I’m going to collaborate with people and I’m really going to live up to that commitment, I can’t just write a report by myself’, (Lincoln, 1997:9).

Instead of speaking for or on behalf of the Group and relying on only my interpretation of the data, the participative approach adopted during this investigation, including participants’ involvement in the analysis of data, enabled Group members to ‘hold onto’ (McIntyre, 2008:68) their own words so that their ideas, opinions and feelings are more accurately represented. ‘Participation involves negotiating the legacy of context, not eliminating it’ (Lyon et al, 2010:541) and the dialogic approach and ongoing reflection present throughout this study have, I believe, been instrumental in strengthening the reliability of its legacy. This aligns with Heron and Reason’s (1997) argument that co-researchers in participative enquiry engage in a process of critical recycling through the data so that what is finally arrived at is more robust and considered. Similarly, Powers et al (2006) suggest that adopting a participatory approach can maintain the integrity of research: in this investigation, it has allowed the diverse individual experiences of Group membership to be surfaced, shared and interrogated with a degree of integrity that would seem unlikely to have been achieved by me alone. In addition, through the inclusion of data from individuals (from the individual narratives and the semi-structured questionnaires,) as well as that generated collectively through Group activities, it has been possible for the voices of all Group members, both past and present, to be heard and represented in this account.

The chosen participative methodology serves to maintain the democratic nature of the Group but this thesis is also my doctoral submission. In Chapter 5 it will be necessary to allow my own voice to come to the fore, particularly in respect of identifying the original contribution that this study can make (since I am the only participant that is familiar with the literature and can utilise the concepts discussed in Chapter 2 to analyse the data). However, as with other parts of this thesis, Group members will be able to review what has been written to ensure that they are not misrepresented. In general, the participative approach minimises the degree to which my own views and interpretation of the data shape the study.
However, whilst embracing the notion of participant validation may strengthen the reliability of the research, it will not necessarily prove that the research is valid (Finlay, 2006). The next section discusses issues of validity and generalisability.

3.5.ii The generalisability and validity of case studies

The question of generalisability is one that frequently appears to trouble qualitative researchers, perhaps because of the positivist legacy of needing to justify research for its external validity and statistical robustness (Merriam, 1995). In a tradition where the aim is to produce replicable, objective results that might be used to inform decisions that affect or have implications for the many, the need for such validity and robustness is, from a pragmatic perspective, both congruent and justifiable. As Donmoyer (2000) suggests ....

‘For policy makers who are interested only in aggregates, not individuals, and for whom questions of meaning and perspective have been resolved, the traditional notion of generalisability will do just fine’, (ibid:66).

Ruddin (2006) summarises two arguments in favour of generalisation. Firstly, it can address concerns about the practical application of findings, particularly those of research that is evaluative and, secondly, it can respond to a concern for seeking the truth and justifying the study.

‘Generalisation is an inference of applicability to far more cases beyond the data or the study. [ ] It is a concern about the reach and grasp of knowledge’, (Ruddin, 2006:799).

But what of qualitative research where the goal is ‘to understand the particular in depth, rather than finding out what is generally true of many’, (Merriam, 1995: 57)? Myers (2000) argues that generalisability should not be of primary importance in qualitative research which, in contrast to the quantitative paradigm, rests on ‘the belief that people assign meaning to the objective world’, (ibid:1). It seems that generalisability, like methodology and method choices, cannot be divorced from the aims and purpose of a study, its epistemological starting point and the corresponding beliefs about what can be known.
‘Small, qualitative studies can gain a more personal understanding of the phenomenon’, (Myers, 2000:1) and case studies fall into this category of qualitative research. As Ruddin (2006) notes, ‘the case study is a comprehensive examination of a single example’, (ibid:799); ‘an in-depth study of the particular’, (ibid:798). As with other case studies, the data generated by this investigation is context-dependent but this does not imply that it is of no interest to others, or is not externally valid.

According to Merriam (1995), the findings from case studies can be considered as externally valid or generalisable in three ways. Firstly, as ‘working hypotheses’ (ibid:57) that reflect the conditions of a particular contextualised situation which can act as a guide to future practice. Secondly, by ‘attending to the particular’, (ibid), insights that transcend the specific situation under scrutiny can be discovered which might be applied to similar situations encountered in the future. Thirdly, Merriam refers to the notion of ‘user generalisability’, (ibid) which firmly positions speculation about the application, transferability or usefulness of findings to other situations by the people or practitioners in those situations. This last conceptualisation of generalisability sits well with the pragmatic approach to this investigation which can, after all, only offer findings and ideas for others to consider. The external validity of this study’s findings is not based on the statistical generalisability associated with a positivist paradigm (Merriam, 1995). Instead, internal reliability is aimed for through the utilisation of a participative approach so that the evidence that is available for others to consider is as robust as possible.

As Lincoln and Guba (1985) argue ....

‘At best, the investigator can supply only that information about the studied site that may make possible a judgment of transferability from some other site; the final judgment on that matter is, however, vested in the person seeking to make the transfer’, (ibid:217).

In contrast to Merriam’s reconceptualisation of generalisability for case study-specific research, others argue that case studies need not make any claims about the generalisability of their findings.

‘It is a matter of some debate as to whether generalization is an appropriate requirement to demand of a case study in any case’, (Ruddin, 2006:798).
Similarly, Myers (2000) argues that case studies are not about verifying truth or predicting outcomes, but are about developing understanding and discovering meaning. What is crucial is the use that others make of them; that they feed into the process of ‘naturalistic generalisation’, (Ruddin, 2006:804). Naturalistic generalisations are those that individuals make following their own experiences or their vicarious experiences, which case studies can provide, (Donmoyer, 2000) and may be verbalised or become propositional rather than remain tacit.

‘Naturalistic generalization ensues more commonly from a single study to one that is similar than from a single study to a population’, (Myers: 2000:2).

Consequently, in reporting case studies, there is an onus on researchers to be descriptively thorough to enable readers to recognise (or not) any essential similarities of the particular case that may be of interest to them.

Case studies offer an alternative approach rather than a replacement for experimental or other forms of inquiry such as surveys: they should not be viewed as ‘an inferior sort of scientific method’, (Ruddin, 2006:800). Rather than judging case studies for their weak statistical inference, their strength in capturing detail and depth which, in turn, allows for the analysis of ‘a greater number of variables compared to other approaches’ (ibid:801) should be acknowledged.

This case study makes use of qualitative data; it is about making meaning and developing understanding. Given the research questions and the focus on one specific group, I would argue that traditional notions of generalisability do not apply and agree with the stance taken by Thomas (2002), who posits that ....

‘To foreground the uniqueness of interpretation at the same time as developing theory - is to want to have one's cake and eat it’, (Thomas, 2002:421).

Accepting Thomas's argument, there is no claim to be generating a definitive theory through this investigation. Rather, the intention is to theorise with a view to developing a degree of understanding about the complex influences and interacting factors that are at play in a specific, self-facilitated learning group that have enabled it to sustain its momentum. This study seeks to move beyond interpreting to offer not a truth but a truthful account which ....
‘.... might be used to expound and enrich the repertoire of social constructions available to practitioners and others; it may help, in other words, the forming of questions rather than the finding of answers’, (Donmoyer, 2006:66).

If this research helps others to form questions about their own development or that of others, in my view it will have gone a considerable way in serving its purpose.

3.6 Ethical Considerations

The Group is happy in its skin and, as previously stated, was not overtly seeking to improve its practice at the start of this study. That said, it is and always has been part of the Group’s modus operandi to regularly review what it is achieving and the extent to which members are engaged, interested in, challenged by and satisfied with its agendas and processes. Given this, although the intention in undertaking this study was not to improve the Group’s practice or make changes, it was acknowledged that participation in the study would undoubtedly have an impact on the Group and its members. As Price points out,

‘Some forms of social science, even as knowledge-producing activities, may disrupt a community’s process of coming to know itself through collective research’, (Price, 2008:390).

No matter how well Group members already knew each other, participating in a research project with such an internal focus would potentially change and develop that knowing. The Group already functions with established protocols as described earlier; it has a culture of its own. Disturbing this culture or the Group’s knowing of itself in any way that might be detrimental carried ethical implications that I could not ignore.

‘Being an ethically skilled qualitative researcher involves more than respecting the integrity of the research subjects. The ethical researcher also needs to take into account the cultural context of her research’, (Brinkman and Kvale, 2005:162).

With this in mind and in an attempt to remain as authentic as possible to participative principles, the first significant conversation with the Group about the proposed investigation (in October 2012,) focused on its collective and individual
ethical implications. Starting from the premise that morality and values are already a part of the Group’s world, and that the explicit and implicit moral practices necessary for ethical research (Brinkman and Kvale, 2005) were already in place, I was confident that the conversation would move beyond issues of anonymity and confidentiality. Whilst acknowledging that these and other ethical considerations (such as informed consent,) that are to be found in formal ethical guidelines are important, I was anxious to identify the ‘crucial particularities encountered in the research situation’ (Brinkman and Kvale, 2005:178). To this end, that first conversation with the Group entailed a brainstorm to identify and discuss any ethical concerns that individuals had about the study. An appointed ‘chair’ facilitated this conversation and began by asking me to clarify a meaning for the term research ethics. I used Oliver’s interpretation of ethical research to do this, particularly emphasising that ....

‘research should avoid causing harm, distress, anxiety, pain or any other negative feeling to participants. Participants should be fully informed about all relevant aspects of the research, before they agree to take part’, (Oliver, 2003:9).

The brainstorm that followed identified a number of ethical concerns (see Appendix 9). Each issue raised was considered by the Group and I was asked to respond to a number of questions. Group members discussed (but were not greatly concerned about) confidentiality, anonymity, informed consent and accuracy in reporting findings. However, the potential impact that participating in the study might have on the Group and its members in the future was debated at length. Group members agreed that whilst the study might give rise to individual discomfort or unease, ultimately the Group would benefit.

My dual role as researcher and participant was also discussed, as were the power issues that sometimes emerge between researchers and the researched. The subject of power in relationships (over, with, given, taken and constructed,) had been talked about by the Group during a session several years previously. At the meeting in October 2012, the Group agreed to remain alert to issues of power during the study. A conversation about whether anyone would feel obliged to participate (through a sense of loyalty, friendship or not wanting to disappoint me,) confirmed that this was not the case. The proposed participative
methodology would minimise any *researcher-researched* inequalities (Brinkman and Kvale, 2005), as would open Group reflection. Consequently, it was agreed that all members would regularly reflect (as individuals and collectively) on the Group’s well-being, and that adjustments to the research methods would be made or other appropriate action taken in response to these reflections, as necessary.

Lastly, the involvement of the three past members in the study required some consideration from an ethical perspective. They had each explained to the Group their reasons for leaving at the time of their departure. However, it was suspected that one leaver might be particularly in need of reassurance in respect of confidentiality and anonymity. This was also discussed by the Group who agreed that past members’ responses should not be individually identified. This was facilitated by the involvement of an external researcher to analyse all written responses (of both past and current members) to the open question method previously described; the mechanisms for this are accounted for in Chapter 4. As advocated by Tilley (2003), both the researcher and the transcriber (who was employed to work with recorded discussions) were made fully aware of the ethical protocol for the research and agreed to maintain confidentiality throughout their own involvement in the project.

### 3.7 The Limitations of this Study

This chapter has included numerous arguments to justify the use of a pragmatic, participative case study approach. Nonetheless, whilst I remain convinced of its suitability in this instance (and hope that the reader will be similarly convinced), it is not without challenges or limitations to which I will return later.
Chapter 4  Data Generation, Analysis and the Findings

4.1 Introduction

This is a participative study, yet whilst other Group members may have read and approved earlier sections to ensure that they feel accurately represented, (by, for example, suggesting amendments to the description of the Group in Chapter 1,) it is only my voice and those of published researchers that have been heard thus far. During this chapter, the voices of the Group take centre stage. In the findings section, direct quotations from individuals’ written and spoken contributions to the research activities are included, as are further contributions from the analysis sessions. I suggest that these offer some real insights into the Group and demonstrate why it is worthy of investigation. Both current and past members are represented.

The earlier sections of this chapter aim to clarify how a participative approach was used to respond to the research questions posed by this inquiry, beginning with brief, descriptive accounts of how data was generated, using appendices (where appropriate) to add further detail. How the data was subsequently analysed is then outlined, again using appendices in support. Finally, what emerges from the Group analysis process - the findings - are presented, without deliberation or discussion at this point. These are revisited in Chapter 5, during which concepts discussed in earlier chapters provide a framework for discussion. The implications of the findings, particularly those that offer new or different insights to those found in the existing literature, are also to be found in Chapter 5.

The five research questions are used to provide a structure to the findings section, as in previous chapters. This seems appropriate given that specific methods were chosen to address each of these questions and that the data was organised around the questions during analysis. Data from the non-question-specific methods (the individual narratives and questionnaires,) are brought together with the question-specific data so that all findings relevant to each research question are presented together. Some findings are pertinent to more than one research question and these overlaps and links are signposted.
It should be noted that data generation did not end with the activities earlier listed in Table 1 but continued through an iterative process during analysis, as will shortly be explained.

4.2 Data Generation – Time Frames and Organisation

After the initial Group conversation about the ethical implications of this study and before any further involvement in it, all Group members, both past and present, were fully briefed and signed consent forms, as recommended by Bell (2005). The methods used for this study were identified and agreed by the Group in March, 2013. Data was generated and gathered between March, 2013 and March, 2014. All Group research activities and related discussions took place over the course of three Group weekend meetings. It was decided to address the research questions in order; that is to say, to work on Questions 1 and 2 using the respective agreed methods during the weekend in October 2013, and to work on the remaining three questions in March, 2014.

Prior to meeting in March 2013, all existing Group members wrote individual narrative accounts of how they experience the Group which were shared and discussed during that weekend: it had been decided that this activity would be the most appropriate starting point for the research. Also, past members of the Group and some of the current members (five) responded electronically to a semi-structured questionnaire between April and October, 2013. Finally, following the initial data analysis session which took place in December, 2013, it was decided that an additional discussion on identity in the context of Group membership would be helpful to this inquiry. This was included in the activities that took place during the weekend meeting in March, 2014.

Within the Group, the role of Chair is rotated for each weekend meeting, with different people volunteering in advance. For the discussion elements of the research activities undertaken, the Chair for that particular weekend took on the role of facilitator. Many of the activities involved flip chart work or notes and these are attached as appendices to which readers will be directed when appropriate. Most but not all discussions were recorded and later transcribed by an independent transcriber. Transcribing took place within four weeks of recording
and I checked typed transcriptions against soundtracks for accuracy, being mindful of Tilley’s (2003) warning that the transcriber might not be familiar with the terminology used in the discussions, or might place emphasis where it was unintended. During the final weekend of activities the tape recorder malfunctioned and it was necessary to improvise. On that occasion, I took handwritten notes as did another member of the Group, who habitually makes notes for all sessions. The two sets of notes were checked against each other for parity. For transcribed discussions it was not always possible to identify the speakers’ voices and the majority of contributions made during these discussions (or those for which notes had to be handwritten) were not attributed to specific Group members. Where a speaker is identified (for example, by providing background information about her), it is to illustrate a particular point that Group members agreed was significant in responding to the research questions, and where the contribution could be attributed to a specific individual. In all such cases, the identification of individuals is only possible within the Group and not by other readers of this thesis.

As agreed during the discussion on ethical considerations in October 2012, each research activity was reviewed on its completion, with dual intentions. Firstly, to ensure that it had achieved what had been intended in generating relevant data through questioning and reflection, in line with the participative methodology justified in Chapter 3. Secondly, from an ethical perspective, these reviews served to check the well-being of Group members and to ensure that they were not experiencing negative consequences (Oliver, 2003), either individually or collectively, as a result of participating in the research (please see earlier section on ethical considerations).

The following section describes each method or research activity and how it was used.

4.3 Use of Agreed Methods

The research activities employed during this investigation are described below in chronological order, together with the Group’s rationale for its choice of each
method. As already indicated, most methods were question-specific and, where
this was the case, the method used is identified against the corresponding research
question. Other methods are also detailed but not aligned with a particular
question. Further information on the chosen methods is included in Appendix 6
although it should be noted that this supporting information has been added as a
resource for the reader and was not necessarily available or utilised during the
Group’s decision-making process about which methods to employ (see Chapter 3).
Instead, at the time of choosing methods the proposer of each potential research
activity described it to the rest of the Group and presented a rationale for its
fitness for purpose, which was then either accepted or rejected. The activities
outlined below are those that were accepted by the Group.

Method: Individual narrative accounts.

The Group’s rationale for employing this approach was that it would enable
individuals to record their own thoughts and memories of their experience of
belonging to the Group without being influenced by what other Group members
had to say.

Each Group member prepared a written account of approximately five hundred
words (see Appendix 10) which they then read aloud to the rest of the Group
during the meeting in March 2013. After each reading other Group members asked
questions for clarity. Subsequently, a Group discussion took place to share
thoughts and comments about what had been said and to reflect on the experience
of both writing the pieces and hearing those of other Group members.

Question 1: What encourages, influences and motivates people to engage with and
participate in professional learning groups? Method: Mind mapping activity.

Mind mapping was selected by Group members because it was agreed that it
would facilitate a free-flowing discussion. Group members divided into two sub-
groups, each of which brainstormed the question ‘What encourages, influences and
motivates people to engage with and participate in professional learning groups?’
Mind maps/flip chart sheets specifically focused on our reasons for joining the Group, rather than considering the question in general terms.

Each sub-group produced a flipchart sheet of their responses to the question and all individual contributions were included in the collectively produced mind maps/notes without any filtering occurring. These were then further considered in a plenary discussion. (See Appendices 18 and 23 for images of mind maps used in this research and Appendix 6 for additional notes on mind mapping, intended as a resource for other researchers).


An abstract force field analysis is a way of thinking about and analysing the forces that support a situation or a proposed change, and those that question the same situation or change; that is to say, the opposing forces ‘for’ and ‘against’ something. Used as a group data-generating activity in this instance, it involved dividing a flipchart sheet in two and using one side of the sheet to record the forces ‘for’ and the other side of the sheet to record the forces ‘against’ (see Appendix 6 for further information on force field analysis). The rationale for using it during this study was that it would help the Group to consider both what has helped and what has hindered individuals’ long-term participation in the Group by identifying the perceived forces ‘for’ and ‘against’ sustained membership. The facilitator used a flipchart to focus attention and record initial ideas from the Group (see Appendix 11), which were then discussed at length, generating further data in response to Question 2.


This method was suggested by one member of the Group who had frequently used it as a way of encouraging other groups to move beyond superficial responses to questions, drilling down into initial responses by asking the respondent to say more a further four times (see Appendix 6 for further reading on the Five Whys
On this occasion, the original research question was reformulated by the Group to ‘Why is it that this group, which is self-directed and self-facilitated, is successful in achieving ongoing transformative professional learning?’ Consistent with the treatment of the other research questions, the Group’s responses remained focused on membership of the Group, rather than hypothesising about learning groups in general. Changing the wording enabled ‘why?’ questions to be posed in line with the agreed method, whilst retaining a focus on self-direction, self-facilitation and ongoing, transformative, professional learning. The question was written up on a sheet of flipchart paper and the intention was that individuals responded with sentences beginning with ‘because’, although this process was not strictly adhered to. Instead, we went with the flow of the conversation because the quality of the responses (that is to say, their depth and relevance,) seemed more important than using consistent phrasing. Each response was discussed by the Group before moving on to another response. Because of malfunctioning audio equipment, the conversation was recorded by two note takers and the notes later collated to capture as much detail as possible.

**Question 4: What are the implications and outcomes for participants as a result of their long-term group membership? Method: Images, symbols and metaphors.**

This method involved each Group member selecting a way of representing their response to the research question symbolically, through an artefact or metaphor. The intention behind choosing this method was that it would facilitate individual contributions in that each member would prepare their artefactual or symbolic response in advance and thus be relatively uninfluenced by others when it came to sharing thoughts, feelings and experiences. This approach was therefore primarily intended to generate individual responses to Question 4. The symbolic representations chosen by individual Group members in response to the question included artefacts, metaphors and a performance (see Appendix 12 for images and Appendix 6 for further reading on this method). Members took turns to present their pieces and were then asked questions or offered comments by others. Again, notes were taken for this activity.
Question 5: If successful learning groups are defined as those in which participants continue to achieve their learning goals, why are some groups successful and others not, and what enables “success” to be sustained? Method: Cultural Models and Taboos? Group brainstorm and discussion to explore the taboos that exist within culturally positioned groups and how these might help or hinder group sustainability.

When choosing methods early in 2013, Group members were interested in looking at group membership through a cultural lens and, in particular, exploring the taboos that might exist in groups. However, when the time came to undertake this activity, it was felt that whilst exploring group taboos through discussion would be interesting, it would not necessarily address the research question. Instead and in order to avoid reaching generalised or even speculative conclusions, it was decided to brainstorm and discuss responses to why this Group is successful first of all, and to then address ‘why some groups don’t work’ using our own experiences of membership of other groups to do so. In undertaking the first part of this process, responses were found to overlap somewhat with responses to Question 2. A flipchart was used to record the key points that were raised during the first activity with supporting notes taken by two Group members. A mind map approach was used to record responses to ‘why groups don’t work’ (see Appendix 13).

Method: Individual semi-structured questionnaires.

The rationale for using semi-structured questionnaires is included in Section 3.5. (See Appendix 6 for further reading on the use of questionnaires). As mentioned in Chapter 3, all three past members of the Group (referred to as X, Y and Z in this chapter,) agreed to participate in the study and responded to the questions in Appendix 8 by email, as did 5 current Group members (see Appendix 14 for samples). The fullness of responses varied and one past member requested a follow-up telephone call to expand on her written responses. The notes from that telephone conversation were attached to her completed questionnaire.
4.4 Analysis of the Data

Researchers ‘are not neutral spectators in the world, but participants in that world’, (Smith and Hodkinson, 2002:292). This is particularly pertinent for this inquiry, given my own dual role of researcher-participant. The participative approach described and justified in Chapter 3, was maintained during the assessment and analysis of the data, as advocated by Heron and Reason (1997), and all current Group members were involved. Those living in the North West and North Wales met in December, 2013, to analyse the data gathered prior to that point in time, and those living in the South East met in May, 2014, to analyse the remainder of the data. On both occasions four of us were involved in the analysis process. Electronic copies of the data were circulated in advance of the analysis meetings where possible. I attended both analysis sessions and provided hard copies of individual narratives, transcripts, notes and other data for coding, discussion and interpretation. Several different approaches were used to analyse the data, each pragmatically chosen to enable Group members to participate in the process and to answer the research questions. Analysis approaches were kept as simple as possible whilst allowing for multiple interpretations of the data to be surfaced, compared and discussed.

‘There is no one single or correct way to analyse .... qualitative data: how one does it should abide by the issue of fitness for purpose’, (Cohen et al, 2008:462).

In this instance, fitness for purpose entailed maintaining a participative methodology and addressing the research questions.

As will have become apparent from descriptions of the chosen methods, the data were not uniformly presented. Individual narratives and the completed online responses were not specific to any of the research questions and therefore required a different approach to the activities that were. The online responses were not analysed by the Group and I will return to the process used for those shortly.

The individual narratives were coded using a focus-by-question approach (Taylor-Powell and Renner, 2003); each of us selected and aligned what we perceived as
significant points in the written pieces with one or more of the five research questions (see Appendix 15 for an example). A similar approach was adopted with the transcript of the discussion that followed the sharing of individual narratives, but it was decided to analyse this jointly. That is to say, all four Group members went through the transcript together, identifying, discussing and negotiating significant points that related to one or more of the five research questions in an iterative fashion (summarised in Appendix 20). This in itself was an interesting process and, together with the post-analysis discussions (see Appendix 21) which took place following work on each data set, generated more data. As far as this type of participative research is concerned, the emergence of further data during the analysis process begs the question ‘where is the dividing line between data generation and data analysis?’

Dean et al (2006) note that ....

‘the fascinating thing about doing qualitative analysis is that however many layers one removes in achieving an interesting and coherent story, there are always more layers that can be removed’, (ibid:145).

In participative research this is particularly pertinent but one has to stop removing layers eventually, or at least, pause and draw a line under the findings that will be presented at a point in time. What I have tried to avoid in this study is drawing that line too early. To this end, in addition to using documented outputs and verbatim quotations from the research activities, notes from the discussions that took place post-analysis also contribute to the findings and Chapter 5.

As regards the transcripts and notes for question-specific activities, most were separately coded by the four participating individuals who independently identified question-related themes which were later shared, collated and discussed (see Appendix 16 for examples). For other question-specific data, joint analysis was undertaken similar to that used with the transcription of the discussion of individual narratives, mentioned earlier, but using a thematic approach (Miles and Huberman, 1994) rather than one that was question-focused (examples provided in Appendix 17).
To return to the individually completed semi-structured questionnaires: these were separately analysed by me and by an independent researcher who knew the membership status of respondents but otherwise knew nothing of their identity, except that my own responses were included somewhere in the mix. This approach ensured that the Group as a whole remained unaware of which past members had said what, as had been agreed. Involving a suitably experienced independent researcher in this way was also an attempt to minimise bias (Burnard et al, 2008); responses to questionnaires were not interpreted by me alone. We separately aligned what respondents had written with the five research questions and also highlighted any other points that we considered interesting or enlightening, such as any differences between the responses of past and current Group members. Eventually, a collated summary of our individual interpretations of the questionnaires was produced (see Appendix 22). The independence of the other analyst meant that the boundary between data generation and data analysis was clearer than when analysing within the Group. Her distance from the Group also facilitated relatively objective scrutiny and a differently positioned interpretation of the data than my own. Her voice is represented in both this chapter and the next, in keeping with the spirit of a participative approach.

‘Qualitative data analysis ... is often heavy on interpretation and one has to note that there are frequently multiple interpretations to be made of qualitative data - that is their glory and their headache!’ (Cohen et al, 2007:462).

Adopting a participative approach for the majority of data analysis has certainly been both a glory and a headache and I return to this in Chapter 6 and Appendix 24. However, together with the analysis carried out with the independent researcher, it has ensured that what is to come in the next section (4.5) is not confined or constrained by my interpretation of what is significant. All members of the Group were involved, at one analysis session or the other, in selecting from the data those which were found to be most significant, most interesting and most representative of the Group’s responses to the respective research questions. This included the specific quotations from the complete data sets of narrative accounts, transcripts and notes that are included in subsequent sections of this chapter and
in Chapters 5 and 6. In this instance, and unlike many research situations, my voice is just one amongst those of the other participants.

4.5 The Findings

In this section, the five research questions are again used to provide a structure. Data generated through individual narratives and the questionnaires are included with those generated by question-specific methods under each question sub-heading. Direct quotations are used frequently throughout the rest of this chapter and are indicated in the usual way with the use of inverted commas but not attributed to specific Group members.

4.5.i Question 1: What encourages, influences and motivates people to engage with and participate in professional learning groups?

4.5.ii Findings from mind mapping activity and subsequent discussion

During analysis, eight themes emerged from the data generated through this activity:

- Group membership
- Learning
- Belonging
- Sharing
- Identity
- Respect, trust, safety and security
- Logistics
- Concerns and anxiety

Appendix 18 includes the flipchart sheets produced by the Group and the verbatim comments that were extrapolated during analysis from the transcription of the subsequent discussion.

No weighting has been allocated to these themes; they are all relevant to Question 1 and will be addressed in turn although the extent to which there is corroboration
or otherwise of the concepts introduced earlier in this thesis will be discussed later in Chapter 5. It is worth noting that identity-related comments are more numerous than those associated with other themes.

4.5.iii Group membership

It is evident from the data that ‘who is in the group is important’. Although most references made to other participants specify ‘people’ rather than ‘women’, there is further mention of the all-female composition of the Group under the theme of identity.

Under the group membership theme there is an emphasis on the value of difference and the desire to join a group where there is both ‘diversity and common ground’. The ‘range of experience’ is commented on, as is ‘being valued and valuing what you do’. Both of these points relate to the professional practice of members that provided common ground for the Group at its outset. However, the importance of difference is stressed more strongly: why ‘[it is] good to be with people who think differently to you’ is qualified by ‘everyone here is different enough for it to be exciting’, and further by …

‘We’re all very different – if you get with a lot of other like-minded people I think that’s the road to hell really – bland mediocrity – you’re just going to back up and reinforce each other’s thoughts’.

Whilst it appears that difference is generally perceived as attractive, some concern is also expressed about ‘the differences in the Group becoming bigger’ and ‘will I be able to keep up?’ These comments were made by a member of the Group who is now working less than she has previously and was expressing concern about how ageing might affect her participation in the Group in the future.

Equivalence also emerges as important through comments that stress ‘intellectual and emotional mutuality’, ‘intellectual equality’, ‘feeling accepted and accepting others’, and that ‘[we are] all women in our own right’.

The ‘closed’ nature of the Group is linked to its ‘stability’ and mention is also made of the ‘variety of shared experience’ as a consequence of long-term membership. Being a closed Group is also questioned …
‘You don’t know your levels of complacency because you’re the group and there’s just you. And then if somebody leaves or comes in – it’s just incredible what happens to the music…. I’m just saying that there must be a danger in any society or closed group that complacency is there.’

4.5.iv  Learning

The centrality of learning in the Group is demonstrated in the responses given to Question 1 (and, I believe, justifies the emphasis on learning in earlier chapters). Words such as ‘challenge’, ‘stimulation’, ‘a thirst for experience and knowledge’, ‘meaning-making’, ‘exploring’, ‘newness’ and ‘personal growth’ are associated with why members joined the Group. One woman commented that ‘we’re all learning junkies’, whilst another ventured that …

‘If you stick with what you know .... that doesn’t help you to grow and it certainly doesn’t help the work [that I do]’.

The nature of the content is identified as important - ‘if this was a maths group there’s no way I would be here’. Learning associated with practice is also valued, as is evidenced in the mention of ‘work’ above and the emphasis that one member placed on the ....

‘Newness of things coming in so that when I’m going out, away from this group, that I don’t just always do what’s comfortable for me’.

Nevertheless, the mention of variety (of content) ‘from the practical to the professional’ indicates that the Group’s interest in learning is not confined to professional learning or to the planned and focused sessions that take place during Group weekends. What is valued is the ....

‘holistic approach – not just what we do in the sessions – it’s at the breakfast table, it’s a walk, it's, well, everything’.

The prominence given to the choice of learning topics or content in this data set is also relevant to the efficacy of self-directed learning central to Question 3.

4.5.v  Belonging

Wanting to ‘have a sense of belonging’ and feel ‘connected’ to others working in a similar field emerge as significant reasons for joining the Group. A ‘fear of being alone’ was also expressed and is perhaps significant given that most members of
the Group are independent practitioners. It is evident that the emphasis on belonging also includes the ‘social interaction’ in the Group and members wanting ‘fun and good contact time’. Belonging-related responses and the ‘anxiety about the gap getting bigger’ between members, also associated with this theme, are respectively echoed under the themes of identity and group membership.

4.5.vi Sharing

During data analysis, sharing was identified as distinct from belonging, although the importance of ‘fun and good contact time’ is connected to both. Joining the Group was seen as an opportunity for ‘sharing thoughts and experience’ and sharing is also associated with ‘diversity and common ground’.

4.5.vii Identity

As already indicated, many of the Group’s responses to Question 1 were associated with identity during the analysis session. The fact that all Group members are women is again highlighted in the data, as is the importance of feeling ‘connected’. Other remarks about ‘feeling accepted and accepting others’, ‘self-worth’, ‘self-esteem’, ‘being valued’ and ‘the sense of meaning we feel - confidence in our own voice’ all appear under the theme of identity. Identity and learning are linked together with comments such as ‘we’re very curious people’ and ‘we’re learning junkies’. Being a ‘closed group’ is also linked with identity. However, the majority of identity-related comments generated through the mind mapping activity and follow-up discussion focus on the reference to professional learning within Question 1. A concern for the future is indicated as well as identity-related reasons for initial engagement with the Group. One woman sees Group members as ‘lifetime learners rather than professionals’, placing the emphasis for joining the Group on learning rather than professional learning. Other comments about professionalism and being a professional such as ‘I don’t feel like I’m a professional anymore’ and ‘part of me feels redundant’ are more pertinent to Question 2 than Question 1. These were voiced by one or two of the older members who are now working less or see themselves as semi-retired. Their remarks were countered with ....
‘[Professionalism] is a way of behaving that’s not going to stop just because you’ve stopped going to work.’

and ....

‘You carry all that experience, all that knowledge, you are still a professional person, you still have that with you.’

also ....

‘There’s a difference between our identity, our capabilities and our behaviours and our qualifications ... I wonder whether a retired doctor thinks of himself as a professional.’

Ageing, seeing oneself as a professional and identity are further linked ....

‘We’re all going to have that, you know, how long can I go on working? Am I being de-selected because I’m that old? The answer to that is yes. Quite often you’re seen as less than. Not suitable, not appropriate, whatever.’

The ‘level of complacency because you’re the group’, earlier connected to the theme of group membership, is also associated with the theme of identity and is further remarked upon ....

‘Our ageing is what will dent the complacency because we are all, at some stage, moving into a phase of life where full-on professionalism isn’t what we’re doing any more’.

Although these remarks do not respond to Question 1, the connections between identity, ageing and professionalism were nevertheless seen as significant for the Group during the analysis process and are given further attention later in this thesis.

4.5.viii  Respect, Trust, Safety and Security

During analysis it was agreed that these four words should be grouped together. Safety, in particular, emerges as important, both in respect of why people joined the Group and why they remain members, (which is of relevance to Question 2). ‘Tolerance’, ‘open-mindedness’ and ‘confidentiality’ all feature in association with these themes, as does the fact that ‘we respect one another’. ‘Safety and trust’ are linked together.
4.5.ix Logistical considerations

The Group’s structure, the intention to meet at ‘regular intervals’ and ‘having a whole weekend’ all emerge as important considerations for Group members. As mentioned in Chapter 1, some changes have been made to the regularity and length of meetings over the years. Whilst some members may have joined the Group because of their perceptions of the logistical possibilities for the Group, no logistical decisions about how the Group would function were made until the Group actually met for the first time. This theme re-emerges in response to Question 2.

4.5.x Concerns and anxieties

Although the mind mapping activity and subsequent discussion responded to what encouraged, influenced and motivated [us] to engage with the Group, some members also voiced the concerns that they had about joining, such as ‘my anxiety [was] about I may be challenged’. Some concern-related comments continue to be relevant, for example, ‘having a balance between being safe in your environment but you don’t want it to top over into complacency’, and ‘will I be able to keep up?’ Others are current rather than in response to Question 1, such as, ‘are the differences in the group becoming bigger?’ In both cases, such concerns will be discussed in relation to group longevity in Chapter 5.

4.5.xi Additional findings from individual narratives and questionnaires

The data generated from the individual narratives and the associated discussion supports the points recorded above, as does that from the individually completed questionnaires (see Appendices 20, 21 and 22 for analysis summaries). However, professional development and learning emerge more strongly from the questionnaires and there is far more emphasis in narrative-related data on the importance of all Group members being women, as is demonstrated by the comments extracted during analysis.

The emergence of gender and other identity-related evidence during analysis resulted in the decision to include a further research activity in addition to those already chosen by the Group. This took the form of a discussion during the final
data gathering weekend, the conclusions of which were recorded in mind-map style (see Appendix 23). This data supports some points that have already been highlighted but also reveals that membership of the Group is seen as contributing to individuals’ self-perceptions ....

‘The Group helps me to affirm, question and change my own identity’

and ...

‘Girls - using the terms makes it ageless to me - young in spirit.’

Belonging to the Group is seen by some members as part of their identity and is also viewed as such by their friends ....

‘I realised it was part of my identity when friends asked “when is the next meeting?”’

One woman commented that her friends envy her membership of the Group and that ‘they like it now it focuses on personal development - they were a bit intimidated by the business focus’.

Identity clearly warrants discussion in the next chapter but this last comment also highlights a perceived shift in focus from ‘business’ to ‘personal development’, which emerges again in other data sets and is particularly relevant to Questions 2, 3 and 4.
4.6 Question 2: What sustains engagement and participation in professional learning groups?

Because the longevity of the Group is so significant to the originality of this investigation, this question warrants particular attention. Findings from several data sets are brought together including emailed questionnaire responses from current and past members. This will facilitate a thorough discussion in Chapter 5 of why current members continue to participate in the Group, why past members left, and a comparison of the data from these two sets of respondents.

4.6.i Findings from force field analysis activity and accompanying discussion

The output from this activity was a flipchart sheet, reproduced in Table 2 overleaf, (see Appendix 11 for an image of the original,) and a recording of the accompanying discussion. During analysis, comments from the discussion transcript were aligned with the force field analysis (also included in Appendix 11). This section makes reference to this fuller, aligned commentary.
WHAT SUSTAINS OUR ENGAGEMENT AND PARTICIPATION IN THE GROUP?

<table>
<thead>
<tr>
<th>FOR:</th>
<th>AGAINST:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Adaptability and flexibility of arrangements</td>
<td>• Competing priorities</td>
</tr>
<tr>
<td>• Shared tasks</td>
<td>• Time</td>
</tr>
<tr>
<td>• Extended time</td>
<td>• Losing sense of purpose</td>
</tr>
<tr>
<td>• Missing the experience when it was less frequent</td>
<td>• Toxicity</td>
</tr>
<tr>
<td>• Ground rules</td>
<td>• Others’ dissatisfaction</td>
</tr>
<tr>
<td>• Variation of agenda items</td>
<td>• Not trusting the process</td>
</tr>
<tr>
<td>• Trusting the process</td>
<td></td>
</tr>
<tr>
<td>• Commitment to the journey</td>
<td></td>
</tr>
<tr>
<td>• Sheepdogs’ loyalty</td>
<td></td>
</tr>
<tr>
<td>• Affection and support</td>
<td></td>
</tr>
<tr>
<td>• Bolt hole and virtual safe haven</td>
<td></td>
</tr>
<tr>
<td>• Staying the course</td>
<td></td>
</tr>
</tbody>
</table>

Table 2 Force field analysis in response to ‘what sustains our engagement and participation in the Group?’

It is clear from the points listed in Table 2 and the extended commentary found in Appendix 11 that the reasons for continued participation in the Group extend beyond those given for initially joining it. However, both identity (see Section 2.3.v) and learning (see Section 2.2) remain central. What emerges from the individual narratives and the discussion of the same (see Appendices 21 and 22) supports this claim and corresponds with other data generated through the question-specific activities. The Group’s uniqueness and value to individuals are acknowledged in statements like ‘this group is unique in my life’; ‘[it] is phenomenally important to me’ and ‘the Group’s a wonderful food’. There is further emphasis on the importance of belonging .... ‘I am part of something bigger than me’ .... and particular weight is given to the development of relationships, friendship and connections within the Group. What is also evident is that ‘group members are committed to its continuation’ and envisage ‘growing old together’. Through participating in the Group, one woman commented that ‘[we are] always becoming – I relate totally to that and I never want to get there’.
Further data includes commentary on differences between Group members and an acceptance of compromise is illustrated in comments such as ....

‘We will never resolve it, because we are different. So it’s fine unless we actually come to blows!’

and ....

‘There something about meeting half way – swinging backwards and forwards – it’s the balance isn’t it? ‘

Those analysing the data agreed what they believed to be the key points emerging in relation to Question 2. This is a lengthy list but is included in its entirety in the following table (3) because the longevity of the Group provides a unique opportunity to investigate what sustains membership of a collaborative learning community.
<table>
<thead>
<tr>
<th><strong>Table 3: The key themes identified during analysis of the data in response to Question2 – What sustains engagement and participation in the Group?</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>‘The learning goals were changed to survive and because it was important to the group at the time.’</td>
</tr>
<tr>
<td>‘The group is important enough to people for individuals to accommodate where we are now.’</td>
</tr>
<tr>
<td>‘The heart becomes more important than the head as time goes by.’</td>
</tr>
<tr>
<td>‘Lovely examples of what the group wants becoming more important than what individuals want.’</td>
</tr>
<tr>
<td>‘Permission to leave – is this real or not? A semantic? X thinks it’s difficult for people to leave if they want to.’</td>
</tr>
<tr>
<td>‘Relationship level – appears more important than other things.’</td>
</tr>
<tr>
<td>‘The quality of relationships – it’s possible because of long termness.’</td>
</tr>
<tr>
<td>‘Individuals do things in the group that are personally challenging – they put themselves outside their comfort zones and, as a result, learn and gain a lot. They are prepared to because of the long-termness of the group. It’s not like stepping out of your comfort zone in other situations (e.g. with a group of strangers).’</td>
</tr>
<tr>
<td>‘The process of participation in the research parallels the self-determination in the group.’</td>
</tr>
<tr>
<td>‘The ground rules add shape, safety and structure.’</td>
</tr>
<tr>
<td>‘Being understood has grown deeper over time.’</td>
</tr>
</tbody>
</table>
The level of trust keeps cropping up and is significant – it’s grown with time too.

The importance of reflection stands out – particularly after ‘wobbles’ – it’s a bit like renewing your vows! I’m surprised at the strength of feeling about commitment levels.

The number of times that trust and support are mentioned – there’s a buoyancy about the group – being held, allows you to swim with support.

There are a lot of comments about learning and new experiences – relating to both Q1 and Q2 – it’s still there.

Feels like family – commitment to the group. The feelings of transience – I have these with family. The difference here is that we have a formula – we can leave feeling complete. It’s a good metaphor for life – find out what’s ok and what isn’t; what’s appropriate and what isn’t – and always having a feeling of security, I’m not going to be abandoned.

I picked up some words – betrayal, anxiety, nervous – these are things that are difficult – do we manage not to look at them perhaps because they are dissipated by the structure of the group? At the same time, there are no taboos and a darker side comes out. Coming together with a lot of peers is always going to be difficult. Competitiveness and envy – speaking out about them and not being held.

Being invited to join – we were all invited – this gave us some kind of status. How things begin is important in learning groups. Are you wanted or not? Is your participation legitimate or not? Is it about social capital?

Self-directed – we belong because we choose to.

In the life cycle of a group, where are we? We’ve gone from baby through childhood and teenager stages – are we more mature now?
We’ve managed to get over X and Y leaving quite well. Why? The process of leaving is really important – we said goodbye to Z properly. The other 2 leaving was more sudden and puzzling. Not altogether clear [to everyone] why they left.’

‘Inviting new members in – is a sign of renewal, a willingness to look at new people, we chose who came in though.’

‘Everybody is interested in learning.’

‘The differences are as evident as the similarities in members.’

‘Forming – storming – norming (we are doing this all the time).’

Table 3  The key themes identified during analysis of the data in response to Question 2 – What sustains engagement and participation in the Group?
4.6.ii  Additional findings from questionnaires

Past members provide some helpful insights into why people might not remain engaged in the Group. Table 4 compares the perceptions of past members with those of five current members. There are some noteworthy differences associated with learning preferences, learning content, trust and ‘personality clashes’.

<table>
<thead>
<tr>
<th>Past members (3 respondents)</th>
<th>Current members (5 respondents)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Two out of three described themselves as being independent learners (and/or independent people in general), preferring to learn on their own rather than in groups. The third person, although expressing no aversion to working in groups, describes experiencing similar frustrations in other groups - too much talking about things that were not of interest to her.</td>
<td>None of the existing members described themselves as independent learners - there were strong expressions of valuing others’ views, experience and input through group membership and sharing.</td>
</tr>
<tr>
<td>Two out of three had issues of trust within the Group and felt unable to express themselves authentically. One member did not believe that the ground rules were robust enough to facilitate trust.</td>
<td>None of the existing members expressed issues of trust. Most explicitly mentioned that they experience a high degree of trust within the Group and/or high levels of support from other members.</td>
</tr>
<tr>
<td>Two out of three believed that they personally clashed with another individual in the Group.</td>
<td>None of the existing Group members mentioned that they personally clashed with other members but one observed a clash elsewhere.</td>
</tr>
<tr>
<td>All three expressed experiencing difficulties relating to physically attending (competing priorities; logistics of family life; travel).</td>
<td>Three out of five expressed difficulties in attending, particularly in respect of competing priorities, but all felt that the benefits of attending outweighed</td>
</tr>
</tbody>
</table>
One out of three thought that the group was too serious and formal and another thought that it was not serious or formal enough.

All three remembered some sessions as being interesting and used other positive adjectives to describe the group.

All three felt that they had made some good friends.

All five used a range of positive adjectives to describe the group including interesting.

All five used terms such as friendship, support, closeness and trust to describe their relationships with other members.

**Table 4  Analysis of Individual Questionnaires: contrasting responses from past and current members**

This comparative data is scrutinised in Chapter 5. Although Question 2 specifically relates to individual participation in the Group, certain findings in this section also have some relevance to Question 5 (relating to why groups work).
4.7  Question 3: Why is it that this group, which is self-directed and self-facilitated, is successful in achieving ongoing transformative professional learning?

4.7.i Findings from ‘five whys’ activity and follow-up discussion

Analysis of the notes taken during this activity highlights a number of key points associated with how the Group works together to self-direct learning (as theorised in Section 2.5.ii): that is to say, influence the direction of learning and the content of sessions. One member comments ‘the self-directed bit - we all do it - there’s equality’: mention of ‘democracy’ and the Group being ‘co-operative’ support this notion of shared responsibility-taking. Also of note is that ‘there’s an element of curiosity in all of us’ and that ‘we explore things quite deeply before we reject them [as potential topics/activities for future meetings]’. Specific, content-related comments value the ‘intellectual exchange of ideas’ that ‘keeps my grey matter going’, but ‘learning about what impact I have on other people’ is also emphasised, as is ‘personal growth’. There is an implication that preferred content is not just about developing conceptual understanding but, more importantly, facilitates transformative learning.

When considering self-facilitation, both content and structure are clearly valued but are separated from each other. The Chair’s role is acknowledged as critical to structure in comments such as ‘the Chair manages the structure not the content’ and ‘[the Chair] is given power to keep us on track and on time’. Also, ‘different styles of chairing’ are welcomed.

The Group is seen as ‘safe’ and there is ‘unconditional acceptance’ which allows Group members to show their vulnerability and facilitates transformative learning. Participants commented ....

‘There is a double-edged sword with safety - you expose yourself. It’s a risk you take and it can be uncomfortable sometimes’.  

and ....

‘Are we being a bit cosy? I don’t think so. Cosy is a death knell’. 
Finally, it is worth noting that the Group’s discussion for this activity began with the question ....

‘We are assuming we are successful, are we?’

One woman’s answer to this was ....

‘I wouldn’t still be working professionally as I am if I didn’t come to this group. It gives me something I don’t get anywhere else - it’s partly being respected, you see the whole of me and I see myself reflected. It’s helped me stay feeling I’m a capable professional person and I’m good at what I do.’

This is clearly relevant to this question and to Questions 4 and 5.

4.7.ii Additional findings from individual narratives and questionnaires

Narrative accounts

Nothing emerges from the individual narratives that specifically relates to this question, although during the analysis of the discussion that followed the reading of these, the importance of being able to negotiate the content of the sessions was highlighted.

Questionnaires

A number of comments from past members are pertinent to Question 3 and offer different perspectives to those emerging from current members’ responses. Relating to self-direction, two past members identify that their own goals relating to the direction of learning were not met within the Group ....

‘What I wanted was a group that I would feed off for inspiration and motivation – it didn’t really happen for me.’

Also in contrast with current members’ views that risk-taking is possible, one past member experienced the Group as ‘too familiar and cosy’ during the time that she participated, and believes that ‘sometimes we avoided controversial topics’. This avoidance of discussing matters that might be controversial or uncomfortable is also referred to by another past member but, from her perspective, she did not
experience the Group environment as safe enough to enable this. She particularly questions the Group’s self-facilitation and remarks on the disadvantages of not having an external, impartial facilitator to go to for advice: someone who also provides a ‘safety net’ and can monitor group dynamics and relationships from a removed position. She goes so far as to say that ....

‘Had there been a facilitator I would have turned to them for advice or assistance but without that option I decided that I did not want to deal with the issue which was mine and I had a choice to either live with it or leave the group.’

She also comments that ....

‘To have had a designated facilitator would have changed the experience completely and I don’t think that’s what anyone wanted. I didn’t want that. But were we actually self-facilitating? Or were we simply facilitatorless? .... I’m strongly attached to the idea of self-facilitation with its promise of empowerment, shared responsibility and shared exploration, but there were times when I felt we were at sea without chart, compass, captain or rudder.’

Interestingly, this perception of things being left ‘unsaid and undealt with as there was no certainty about being able to manage the process, no safety net’ does not appear to be shared by current Group members, given earlier references to ‘safety’ and ‘trust’. This raises a question for later discussion about whether the Group’s longevity has enabled it to develop its own ‘chart, compass and rudder’ and learn to manage without a ‘captain’.

A further tension is identified by two past members between what they perceive as professional development and personal or emotional development. In contrast to existing participants, they appear to see the two as either largely incompatible, or undesirable when pursued together.
4.8 Question 4: What are the implications and outcomes for participants as a result of their long-term group membership?

4.8.i Findings from individual 'presentations' and follow-up discussion

The artefacts, metaphors and performance that participants used to symbolise their individual responses to this question were:

- A self-sculpture (a performance)
- A camellia (an artefact)
- A unicorn (a metaphor)
- The story of the giant turnip (a metaphor)
- A twig (an artefact)
- An elephant tea tin (an artefact)
- A square plateful of different teabags (an artefact)

The four Group members involved in the analysis process individually identified themes from the presentations and from the follow-up discussion (notes available in Appendix 12) and compiled an agreed list of these themes, included in Table 5, overleaf.
- Transformation
- Beauty, beautiful
- Acceptance of self/self-knowledge
- People take time to hear -v- making themselves understood
- No such thing as permanence/ephemeral - acceptance of this/philosophical about this
- Difference/diversity/the blend in the group is valued
- Strong/fragile/delicate/bedrock - all adjectives used to describe the group, contradictory at times
- Better at extracting turnips [pulling together to resolve challenging issues]
- Safe ‘testing ground’
- Slowly revealing self
- Calmness
- Safety
- Getting something different from the group than from elsewhere (friends/family/other groups)
- ‘Lucky’ - feel fortunate to belong
- Longevity of the group is important
- We have a shared language - mutual language/understanding
- Trusting

Table 5 Themes identified during analysis from individual responses to ‘what are the implications for you of your long-term membership of the Group?’

The data suggest that the longevity of the Group has affected the intensity or strength of many of the listed themes: the longer it is together, the more they are in evidence.

Reference was also made to the level of openness in the Group. Whilst there is a structure and the sessions are planned, Group members remain flexible and open to unexpected opportunities that arise. As one participant explained ....

‘We get much learning from being open to unplanned events - there’s a danger of only getting what you ask for without this openness.’
4.8.ii Additional findings from narrative accounts and questionnaires

*Questionnaires*

Past and current members generally agree that participation in the Group was/is fun, enjoyable and interesting; enabling them to learn and discover things about themselves and develop their professional practice. Nevertheless, the comments relating to self-learning from past members are somewhat more reserved than comments from current members, one of whom believes that her long-term membership of the Group has led to ‘challenging my own identity and view of myself - my lack of tolerance and having to learn to manage that.’ Also, there are no references from past members to feelings of safety, a willingness to take risks or to ‘dare greatly’ that current members mention. One past member believes that ‘to have gone deeper we would have needed more time’, which reflects the correlation between long-term membership and the growth in trust between Group members alluded to earlier.

In agreement with the Group’s existing participants, past members mention ‘a sense of belonging’, further evidenced through comments such as ....

> ‘I felt we were mostly true friends with a common bond because of what we all did for a living, some common background and experiences, and a growing fund of time shared together.’

and ....

> ‘I feel that we all still have a common connection and I could pick up with them anytime. That’s a very good thing to come away with and still have.’

and finally ....

> ‘I have good memories of it but wouldn’t do it again.’

Overall though, current members voice their views on this aspect of group membership more strongly: one woman comments that ‘I simply couldn’t imagine being without you all.’ This intensity is also reflected in individual narrative accounts.
Narratives and accompanying discussion

Analysis of current members’ written pieces and the subsequent discussion of the same corroborates and extends what has already been said in response to Question 4, particularly in respect of the value placed on ‘shared memories’ and ‘safety and challenge’. The uniqueness of the Group to its members in offering the ‘support of peers’ is further emphasised by ....

‘There is nowhere else in my life where I feel that I have the same experience of learning (about whatever) and discovery in an atmosphere of such trust’.

Being a long-term member is associated with ‘us growing old together’. During the years that the Group has been in existence, participants believe that ....

‘We have grown and changed’

and that ....

‘We have grown in this way because we have consistently shared in a safe place [which] is, for me, the biggest strength of the group now’.

Lastly, the data generated from all activities that respond to Question 4 point to further aspects of identity and identifying. These both remained in focus during analysis when one woman stated that ....

‘I love that my friends outside also see it [the Group] as precious.’

This supports the earlier references to identity included at the end of Section 4.6.
4.9 Question 5: If successful learning groups are defined as those in which participants continue to achieve their learning goals, why are some groups successful and others not, and what enables ‘success’ to be sustained?

Some reference to the Group’s success has been made in the findings relating to Questions 2, 3 and 4. The specific research activities responding to this question generated data that either serves to support what has already been noted, or surfaces additional points that can contribute to the discussion in Chapter 5.

4.9.i Findings from flip chart activities and associated discussion

Two data sets were produced in response to Question 5: flipchartted notes listing the conditions that Group members associated with the Group’s success and a mind map representing their experiences of other, unsuccessful groups (see Appendix 19). Key themes identified during analysis from both data sets were collated into the summary notes included in Table 6 below.

- Trust within the Group.
- The composition of the Group.
- Variety and flexibility - of the content and with the structure and processes used by the Group.
- No performance is required - because we do not feel the need to perform, there is authenticity.
- Starting from a sophisticated/mature position in respect of the above - due to the nature of the work that we are all involved in there was an understanding of what makes people tick - this provided some common ground which has developed further as we have gone along.
- Hearing each other - spotting difficulties and confronting them (that individuals have with others, both outside and inside the Group).
- Having a structure.
- Psychological awareness - being switched on and aware - don't always need to know the theory (is this intuitive?). Having an ability to establish rapport, empathy, genuineness. Our own development (of this) has continued and increased. We have become more interested in the person behind the professional with the passage of time.

Table 6 What makes this Group successful? (Why does it work?)

Table 6 summarises participants' opinions of why this Group works and why it remains intact. By implication, the antitheses of these points may explain why some Groups do not remain intact. The mind map constructed by the Group
addressing the question ‘why don’t groups work?’ identifies that a lack of ‘shared goals/beliefs/values’, ‘respect’, ‘sense of humour’ and ‘appreciation/awareness of [cultural] difference’ also hinders groups from working. Similarly, the presence of ‘too many chiefs’, ‘dogma’, ‘gossiping’ and ‘closed minds’ in a group and ‘the tyranny of structurelessness’ are thought to be problematic. This time, by implication, the antitheses of these can be assumed to contribute to why groups do work.

During this research activity, comparisons were also drawn between how participants experience the Group now compared to at its outset. These are relevant when considering the implications of Group longevity (Question 4) …  

‘In the early times, my lack of self-confidence did lead me to feeling I had to contribute and show my worth and credibility to myself. When this faded it allowed me to take risks’.

and ....

‘Coming back to the beginning, I found myself making comparisons with others - are they more successful in life than me? …. I know this is about me not you’.

4.9.ii Findings from questionnaires and narrative accounts

These data sets generally support what emerges from the question-specific activity above and several additional points are also noteworthy. For some, membership of the Group has allayed fears arising from past experiences of groups …

‘I had been very badly burned at Greenham by radical, lesbian feminists and hated that experience.’

It has encouraged some individuals to participate in other Groups …

‘I’ve joined two triads [since being a member of the group]. I’ve found both very useful. One came to a natural conclusion and the other is still ongoing after 3 years.’

It has also provided a forum in which members can reflect on their own behaviour in groups, and a benchmark with which to compare other groups. One past member, talking of her own experience of the Group, comments …
'I found out how impatient I am in a group. I am [now] in an action learning set – small business owners – it is working okay but the commitment to turn up sometimes is not great …… Funnily enough, the check-ins are getting long and drawn out just like [the Group] and I am getting frustrated.

Finally, both past and current members question whether the Group could do more for other people, particularly other women, as evidenced by the comment....

'We have kept our aims quite selfishly in a way haven't we? We could have got more involved with .... helping women, young women. It's a bit of a selfish group.'

4.10 Chapter Summary and 'Ongoing Business'

This chapter includes descriptive accounts of the methods employed during this inquiry and the participative approach that was adopted to analyse the data generated. Summaries compiled by the analysts and direct quotations from the spoken and written contributions of current and past Group members have been used to respond to each of the research questions. During the next chapter these responses will be discussed in detail and those that Group members judged to be significant will be analysed through the conceptual framework included in earlier chapters.

It is also worth mentioning that a further output from the second data analysis session was a list of questions that the analysts believed merit further discussion, as follows:

- The person behind the professional - can even disparate groups of professionals with an interest in doing so look at this [the person]?
- Is this shift [in our goals and our behaviours] because we've got older and are moving out of our professional roles?
- Might we shift again?
- Is the professional bit necessarily to do with having a job?
- How would new, younger members (if invited to join) perceive this Group?
• Do we want to leave a legacy - introduce an element of mentoring - and invite younger people along?

I mentioned earlier in this chapter that it was necessary to draw a line under data generation at some point in an investigation, and we have already reached that stage in this instance. There is no intention to undertake further research activities within this investigation to respond to the above questions but some of them are pertinent to the findings of this inquiry and, in line with the pragmatic approach adopted for this study, will be incorporated into the next chapter. Others are clearly questions that relate to the Group’s future and are for the Group to consider at a later time, if it wishes.
Chapter 5  A Discussion of the Data

5.1 Introduction

Throughout Chapter 4 the emphasis was on enabling the Group’s voice to be heard, through both the data generated during this investigation and the shared analysis of that data. A significant number of quotations were included to illustrate Group members’ perceptions, thoughts and opinions relating to their initial engagement with the Group and why they remain engaged (or not, in the case of past members). Attention was also given to the self-directing, self-facilitating nature of the Group and to the implications and consequences of prolonged membership for those women that remain members. Lastly, why the Group works was considered, alongside why some groups become dysfunctional.

The participative methodology employed during this inquiry ensured that Group members were able to influence how data were generated in a way that mirrored the Group’s established, collaborative modus operandi. This mirroring continued throughout analysis when Group members identified and agreed what they believed to be the key points emerging from the investigation in response to the research questions. It is now necessary to move away from participation in recognition that this thesis is my doctoral submission and, as such, must demonstrate my own scholarly capability. Nevertheless, whilst my voice might be the strongest from this point onwards, I intend to keep the Group's voice in evidence and to continue with the practice of receiving feedback from Group members to ensure that they do not feel misrepresented.

During this chapter, some of the concepts referred to in earlier chapters, particularly in Chapter 2, will be utilised to analyse the points presented in Chapter 4. Although the data that support the literature are discussed, such discussion will be kept brief to enable those that contradict the received wisdom and offer original contributions to be given most attention. To this end, rather than repeat the convention of using the research questions to provide a structure as in earlier chapters, the key themes that emerged relating to each question during analysis are brought together. As in the previous chapter, inverted commas are used to
indicate quotations from the data but these are not attributed to specific contributors.

Finally, it will be remembered that a detailed discussion of learning was included in Chapter 2 and I mentioned that it was my own views that were being expressed at that point, rather than those of the Group. It will have become evident during Chapter 4 that learning is positioned as central to the Group’s purpose by its members. Wanting to learn is seen as a significant motivator in attracting and retaining members and it is strongly associated with members’ identity. The term ‘learning’ is used frequently throughout this chapter, mirroring the frequency with which it occurs in the data, and attention is given to Group members’ perceptions of learning in Section 5.6. At this point, Biesta et al’s (2011) summary of metaphors that in turn describe learning as acquisition, participation, constructed or becoming, is useful to condense the earlier discussion on learning. From a pragmatic standpoint, I would suggest that none of these metaphors are necessarily better or more accurate than the others but each can have their place, depending on what is being learned, the learner’s epistemology and the degrees of formality and deliberateness in learning situations (see 2.2.i). The many references to learning that will be encountered in this chapter prior to Section 5.6 embrace all of these metaphors in an attempt to maintain focus on the research questions, reflect the centrality of learning within the Group, and avoid stifling Group members’ voices.

5.2 Joining the Group: a starting point for discussion

Schwartz (1999) argues that it is not enough to have an intention to collaborate, for learning to occur there must also be an intention to learn. Accepting Wenger’s (1998) assertion that learning happens constantly, whether we plan for it or not, would seem to contradict this but I believe that Schwartz’s implication in his use of intention is the need for an openness to learning. The data indicate that Group members wanted both to learn and to collaborate from the outset. During the analysis process the intention to learn and an openness to learning, together with a number of other themes, were identified as significant in the data when considering what encouraged, influenced and motivated people to engage with and participate in the Group (see 4.4.ii). The data generated in response to why
individuals joined the Group serve to affirm the literature referred to in Chapter 2: they were motivated to participate because they had previously experienced learning activities as meaningful and benefitted from them (Wlodkowski, 1999). They believed that collaborating with others would facilitate meaning-making through reflective discourse (Taylor and Lamoreaux, 2008), enable them to develop their practice (Jarvis, 2006; Wenger, 1998); and be enjoyable. They also wanted to identify themselves as members of a group of professional women. Trust and safety were expected by members of the Group from the outset and are fundamental to other aspects of this study; as such they warrant further attention later in this chapter, as do identity-related data.

Consistent with Liu et al’s (2011) argument that motivation to learn is influenced by earlier life experience, it is clear from individual narratives and other data that members’ biographies had a significant impact on why they joined the Group and on why they remained members - or not. As one woman remarked whilst reflecting on the data....

'We perhaps missed a trick not talking about the group in relation to the socio, economic, cultural, political biases of the times we were in [when we formed]. Were we always reflecting it, a bit ahead or behind? Is participatory learning more susceptible to cultural norms or not? Our priorities have changed as we've grown older but also in relation to the above. I am sure I would never have got into business if it hadn't been for Margaret Thatcher upping the ante and forcing me to go and get a proper job.’

She went on to say that she would have remained a full-time musician had circumstances been different. The implication is that her career path and the Group itself (as a forum for professional learning) were both products of their time. The correspondence between an individual’s socio-cultural foundations and the motivation to learn is well-supported in the literature (see Fook and Garner, 2007; Taylor and Lamoreaux, 2008; Liu et al, 2011), as is the need to recognise how socio-cultural factors shape the nature of transformative learning (Segers and De Greef, 2011). The relationship between people’s backgrounds and learning emerges as significant in this study and will be further discussed later in this chapter.
The professional experience of members as facilitators of personal and professional development for others provided the initial common ground for the Group. Members were excited at the prospect of being part of a community that enabled them to share experience and learn from others working in the same field. In addition to the similarities in members’ professional biographies, there was mutual enthusiasm for learning, in all of its guises. All members also positioned their work prominently in their lives. As one member put it, ‘it was okay to be into your work’, which was something that she experienced as unusual at that time.

Universal agreement between Group members of the need to spend time forming as a group appears to reflect shared values. We wanted a safe environment where we would be able to take risks and be challenged but recognised that we would need to work together to create this. Investing time in ‘grounding’ (Baker et al, 1999:33), sharing expectations and establishing ground rules in some form were familiar practices to us all through our facilitation work. Yet this may have been a double-edged sword; our familiarity with supporting client groups through their grounding processes may have resulted in a degree of complacency so that we were less thorough with our own ground rules than we might have been, as was suggested by one of the past members (see Table 4). This view was not shared by other Group members and during analysis the Group’s ground rules were particularly connected to its longevity and to levels of trust, safety and challenge in the Group. Nevertheless, the conflicting views and obvious significance of the ground rules to Group members warrants further attention and will shortly be returned to.

Jarvis (2006) argues that ‘people strive to live meaningful lives’ (ibid:53). Affiliation with the Group and the associated implications for individuals’ self-perceived and public identities presented an opportunity to satisfy this need for meaning-making and facilitated the legitimisation of individuals’ professional practice (see Lave and Wenger, 1991). The composition of the Group, particularly its all-female membership, was influential in members’ decisions to join. Who was to be in the Group was important. However, whilst most were particularly drawn to a group that was exclusively for women, others were anxious because of
previous experiences in female-only groups. Again, individuals’ starting positions were clearly oriented by past experiences.

In summary and with the intention of developing discussion on group composition, identity, trust, safety and challenge later in this chapter, it is clear that initial motivation to join the Group in 1997 stemmed from a perception that it presented an opportunity to develop professional practice. Group members hoped to experience work-related learning and be challenged in an atmosphere of mutual support with women who shared an enthusiasm for professional development and worked in similar fields. They also wanted to have fun - to enjoy the experience of being members of the Group. In itself, this is unsurprising and supports the literature referred to in respect of individuals’ inclinations or motivation to join learning communities in Chapter 2 (see Wenger, 1998 and 2006; Hansman, 2001; Fook and Gardner, 2007; Lave and Wenger, 1991; McCormack, 2006; Schwartz, 1999). What is surprising is that the Group is still in existence some eighteen years later and shows no signs of disbanding. I doubt that any of us envisaged at its outset that this would be the case but the intention to ‘grow old together’ is strongly voiced in the data and the group's longevity provides the focus for the next section.

5.3 Group Longevity

Although this is not a longitudinal study, the Group's longevity still affords an opportunity to consider a number of temporal aspects of learning in groups. Specifically, why this particular Group has endured for so long, and secondly, what impact sustained participation has had on its members.

During analysis, an association was identified between the Group’s shared memories and its longevity. This supports Gongaware's (2011) claim that collective memory associations draw on the recent and distant past of a group, its collective actions and shared culture as ‘sources for continuity’, (ibid:48). Such collective memory associations facilitate group continuity, allowing participants to explore new ideas as extensions of what the group has done or is doing. The Group’s shared history is seen as binding, creating a ‘ribbon’ or a ‘chain’ that links its members together. The accepted, interactive processes within a group form
part of its history and are as likely to foster the continuity of its collective identity as the endurance of its initial raison d'etre (Gongaware, 2011). How Group members act together, what they experience together and what they want to experience together in the future now emerge as more significant than the focus on work-related learning or professional development which was so fundamental at the outset. Indeed, the ‘variation in agenda items’ is seen as a major force for sustaining members’ engagement. Changes experienced by Group members in their age, their priorities, their working and non-working lives have impacted on the focus of learning within the Group. As one member puts it ....

‘If I just joined a professional learning group I would expect it to stop when I stopped being a consultant or trainer or whatever ... this group has got a lot of other stuff going on in it that keeps me engaged’ (extract from Appendix 11).

Learning remains central but there are ‘no holds barred on agenda items’ (Appendix 11). One member goes so far as to say that ‘there’s [now] a deeper level of purpose and meaning in this group .... and I wouldn’t be here if it wasn’t here (Appendix 11). This appears to contradict Lave and Wenger's (1991) suggestion that sustained participation presents a tension with learning and the processes that support it. Maintaining the status quo by not changing the Group’s membership has enabled the breadth of the Group’s agenda and the depth of relationships and interactions to develop. Members believe that they ‘have a shared language [and] mutual understanding’ (see Table 5) fostered by, and conversely, fostering the group’s collective identity (Gongaware, 2011). The longevity of the Group and the associated development of individuals knowing other members is linked with an increase in trust and the Group being seen as a ‘safe haven’ and a ‘safe testing ground’, where there is ‘a lot of really thoughtful and sensitive support’. This support is seen as ‘very powerful’, leading members to an increased critical awareness of their own ‘tacit assumptions and expectations and those of others, and assessing their relevance for making an interpretation’ (Mezirow, 2000:4).

The symbiosis between longstanding membership of the Group and levels of trust and safety has, in turn, enabled its members to become 'better at extracting turnips' (see Table 5); pulling together to develop deeper understanding of those
assumptions and valuing differences within the Group. In other words, the
conditions created earlier to enable open participation in non-judgmental and
mutually receptive discourse that are fundamental for transformative learning to
occur (Mezirow, 2006) have strengthened over time. Long-term participation in
the Group has enabled members to ‘reveal’ themselves and facilitated
‘transformation’ (see Table 5 and Appendix 12).

In summary then, the Group’s longevity now appears to be self-perpetuating: it is
an outcome of the conditions created in the Group which have accommodated and
facilitated change and, in turn, contributes to why membership is sustained and
the Group works.

5.4 Exclusivity?

The closed nature of the Group is seen by its members as significant for its stability
and longevity. As mentioned earlier, the decision to operate in this way has clearly
facilitated the development of shared memories and a collective identity, enabling
high levels of trust, openness and challenge to be experienced. Current participants
do not experience the *cosiness* or avoidance of contentious topics highlighted by
one of the past members. This perhaps offers further evidence of the Group’s
discourse deepening and more risks being taken with the passage of time (since
that member left). The view of the Group’s members that its fixed membership has
facilitated it prolonged existence is in direct opposition to Wenger’s (1998) view
that movement in and out of a group is essential for longevity, and that
communities of practice should welcome new members⁴. Although there have
been what Wenger (1998) calls ‘complementary connections’ (ibid:110) when
individual members have experienced peripheral or marginal encounters with
people from other groups, or people have been invited to attend a Group meeting,
those encounters or invitations are seen as one directional. They have been a
source of ‘new experiences and new forms of competences necessary to create
new knowledge’ (ibid:212) for the Group.

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⁴ *It will be remembered that although the term collaborative learning group is used to describe the Group in
Chapter 2, it is also made clear that in some respects the Group also resembles a community of practice.*
There has been no peripheral participation (Lave and Wenger, 1991) leading to full membership in the Group for many years; no regular welcoming of less experienced practitioners that might have questioned ‘paths not taken, connections over-looked, choices taken for granted’ (Wenger, 1998:216). The Group’s experience is that remaining closed has facilitated the development of strong relationships leading to a degree of questioning, challenge and depth of discourse that members have not encountered elsewhere: ‘being held allows you to swim’ (see Table 3). Nevertheless, there is recognition in the Group of the danger of complacency developing because it is closed. As one member articulates:

‘you don’t know your levels of complacency because you’re the group and there’s just you … there must be a danger in any society or closed group that complacency is there’.

This presents a tension which the Group has been forced to negotiate at various points in its history when there have been ‘wobbles’ (see Table 3). Subsequent reflection has led the Group to make various changes but not to recruit new members. Interestingly though, some ideas that began to emerge during this research in relation to ways of sharing beyond the Group, particularly sharing its working model, mirror Wenger’s thoughts on the likely two-way benefits of complementary connections. One woman’s comment that ‘we have kept our aims quite selfishly in a way haven’t we? We could have got more involved with …… helping women, young women’, reflects his view that ‘a community of practice can be a fortress just as it can be an open door’, (Wenger, 1998:120).

Remaining closed since 2002 has contributed to the degree of challenge and to the depth of relationships and discourse that Group members experience. Although Wenger (1998) argues that communities of practice should welcome new participants, the potential downside of this is that relationships within a group fail to develop to the extent that those in the Group have. Negotiating the tension between being a closed group, along with all the perceived benefits this brings, and sharing its working model with others is something with which Group members may decide to wrestle in the future.
Briefly returning to Wenger’s (1998) notion that a community of practice can be a fortress; fortresses can keep people in as well as out. This inquiry highlights that whilst a thoughtful approach needs to be taken to who should be invited to join a group and the desired degree of membership flow (that is to say, how open or closed it should be,) it is also necessary to consider how people might leave. It is clear that of the three women who left the Group, the departure of two of them was not experienced positively by most of the remaining members because of the abruptness or manner of leaving. Leaving appears problematic or ‘difficult’ from the perspectives of both those going and those staying. For the leavers, whatever their reasons for going, not remaining committed to a closely-knit Group where they had felt supported was not a decision taken lightly. Some of those remaining felt hurt and bewildered by the departures, not really understanding the leavers’ reasons for going, whilst others questioned the validity of the Group and its worth to them. The resulting ‘wobbles’ mentioned in the data served as a catalyst to review, reshape and recommit to the Group, but they could also have led to its demise. This draws attention to the importance of addressing how people will leave a group, as well as how they might enter it, during grounding and whilst constructing ground rules. Both appear to warrant specific attention during a group’s start up, but the literature only addresses group formation and does not consider how leaving a group might be negotiated, by either leavers or those who remain.

For individuals joining a collaborative learning group for the first time, as was the case for some of the women in the Group, their own preference for learning in this way (or not,) only became clear after an initial period of participation. It is interesting to note that whilst all of the current members who completed questionnaires declare a preference for learning in groups, two of the three leavers mention finding learning in groups challenging and that they prefer independent learning. These are retrospective realisations and the two leavers who disclose this are those that also refer to personality clashes. That their views of their own learning preferences may have been clouded by their experience of not getting on well with a particular individual in the Group is unknown. What is clear is that membership of a group may surface self-knowledge that leads people to recognise both similarities and differences between members that might be experienced as
reasons for staying or for going. Participating in groups such as the one at the centre of this study is not necessarily for everyone, but that may not be apparent to anyone in a group at its outset.

5.5 Participation, Trust and Emotional Security

It is evident from this investigation that the women in the Group have been both surprised and relieved to hear other members expressing similar thoughts and feelings to their own. However, they do not fall into the category of received knowers identified by Belenky et al (1986) in their discussion of women’s silence and conceptions of self as learners. Listening to others is seen as important by Group members but so is voicing one's own perspective and being listened to. Belenky et al (1986) cite a string of studies that identify men as the talkers and women as the listeners. In a women only group, this is clearly not going to be the case but that does not infer that other power-related issues might not be at play. How the women who are currently in the Group identify themselves with learning – wanting to learn, wanting to be challenged and feeling safe to take risks – generally infers a degree of trust and confidence, not only in other members but in their own actions and judgements. As Mezirow (2000) argues ....

‘Feelings of trust, solidarity, security, and empathy are essential preconditions for free full participation in discourse’, (ibid:12).

Yet it is clear from the comments of some of the past members that this has not always been the case. The member who felt unsafe in the Group remained silent at times and the member who felt that the Group had become too serious, appears to have felt uncomfortable with the level of openness and depth that the Group was moving towards at the time of her departure.

Emotions have a significant impact on how we think, our values, beliefs and attitudes and on our motivation (Jarvis, 2006). Likewise, emotions and feelings can play a powerful role in learning experiences and can both motivate or obstruct learning (Dirkx, 2001). The contrast between past and current members’ views is significant in this area: current members describe strong emotions associated with their prolonged membership and the importance of being able to express their emotions in the Group. Meanwhile, past members cite emotions (for example,
frustration) and either the expression of emotion in the Group or their own inability to express their emotions as contributing to their departure. There are no references from past members to feelings of safety, a willingness to take risks or to ‘dare greatly’ in their learning within the Group that current members mention. However, one past member believes that ‘to have gone deeper we would have needed more time’, which reflects the correlation between long-term membership and the growth in trust between Group members alluded to elsewhere in this chapter.

Although collaborative learning communities offer forums for analysing our own assumptions, thinking habits and what we take for granted (Mezirow, 2009), it seems obvious that the depth of discourse in forums such as the Group will remain superficial if participants do not feel safe. Long-term membership appears to have afforded the women that remain in the Group enough time together to establish deeper relationships, facilitating deeper discourse and, consequently, deeper learning. Rather than seeking to control emotions, as do educators in formal settings (Dirkx, 2001), members of the Group have learned to acknowledge, express and appreciate them as ‘integral to the process of meaning-making’ (ibid: 66). Openness is clearly valued within the Group....

'To share things with people who you're not with all of the time feels really safe. You've got them off your chest, you've been supported and then ..... got some ideas to move forward.'

Usher (2009) criticises what he calls ‘confessional practices’ (ibid:177) where the emphasis is on self-development and empowerment, both of which he sees as confined by the societal and contextual norms in which the self constructs meaning, thus potentially rendering confessional practices disempowering rather than empowering. This tension between empowerment and disempowerment is highlighted in the comparative experiences of past and current members of the Group. All three of the women who left the Group saw themselves as being out of step with the rest of the Group in ways that they felt unable or unwilling to influence. Their perceptions of what was happening in the Group did not align with their expectations of what could or should be happening. Conversely, current members of the Group emphasise that it is a space in which they can be open and authentic, in some instances more so than in any other space in their lives.
‘Alignment can amplify our power and our sense of the possible’, (Wenger, 1998:180). Lack of alignment can undoubtedly amplify our sense of what is not possible and of disempowerment.

During analysis, there was some surprise at the frequency of emotional attachments expressed in the data: the ‘place in my heart’ occupied by the Group, for example, is seen as contributing to sustained membership and ongoing learning. As Hill (2001) argues, ‘emotions are vital to thought and to learning’ (ibid:76) but it is clear that this can work both ways. For past members, feelings and emotions do not appear to have been motivational. The frustration and disempowerment that they experienced within the Group seems more likely to have obstructed their learning in that context and certainly contributed to their reasons for leaving. This resonates with Guldberg and Machness's (2009) findings from their research of students’ experiences of participating in communities of practice. They conclude that those who found it difficult expressed strong emotions and stopped participating because they felt so frustrated.

For educators, the creation of an environment in which sensitive, authentic discourse and open acknowledgement of oppressive or limiting experiences can take place is an important consideration (Usher, 2009; Mezirow, 2000). This includes the recognition by learners that they are meaning-makers as well as receivers of constructed meaning. Whether a group is self-facilitated or not, this points to the need for close examination of the background and experiences of its members in order to surface what has been received by individuals and is likely to influence their expectations of and participation in the group. Yet whilst such an examination might reveal differences between members if included in the preliminary, formative discussions that serve to shape a group's ground rules or protocol, this study indicates that differences are not always easily identifiable at that point.

Within the Group, the common ground between members at its outset was gender, the type of work in which we were involved and an enthusiasm for learning that would support our future practice. In working to engage with the Group, there was recognition of shared experience that allowed us to locate our participation in the
Group and our practice which, as Wenger (1998) suggests, is facilitated through imagination and alignment. The discussions that informed the Group’s ground rules concentrated on aligning our expectations, both of what we imagined the Group might offer to its members (the content) and how it might function (the process).

Members of the Group generally agree that the ground rules have been helpful, providing an important foundation and becoming integrated into the Group’s modus operandi. This supports the emphasis placed on the need to negotiate some form of group contract, interaction rules or ground rules that is found in the literature (Stanley, 2011; Wenger, 1998; Dillenbourg, 1999; Guldberg and Machness, 2009; Fook and Gardner, 2007; Billet, 2011). In the process of establishing ground rules, Group members shared information about themselves and their work but did not explore their constructed selves. In this respect, those formative conversations might have gone further, as suggested by one of the past members. This degree of thoroughness is bound to take longer than the ‘few moments’ suggested by Stanley (2011:76) for establishing group norms, if such norms are intended to be pervasive to the extent that they facilitate deep learning.

It appears that the task of forming a group, including reaching agreement on its ground rules or norms, must be preceded by a thorough sharing of experience and a conversation that attempts, as far as possible, to expose the contextually-formed assumptions that individuals hold which will influence their expectations of the group. In the Group’s case, such expectations encompassed what it would do (its content), and how it would do it, including how its members should behave (its processes) in recognition that content and process are inextricably linked and interdependent.

What is evident from this study is that the depth of discourse has changed over time: the longer the Group stays together, the greater the trust between its members and the deeper the discourse. However, from the archived notes of group reviews in the past, even during the first few years of its lifespan, the Group’s members commented on the high level of trust and depth of exchanges that they were experiencing. With the passage of time we have been able to reflect
at intervals and notice progression and movement in this respect: it has only become possible to gauge the depth of discourse as opportunities for comparison with earlier experiences have arisen. Given that members of the Group were mature learners when the Group formed, and themselves engaged in facilitating the development of others, they were perhaps particularly aware of group dynamics, the need for grounding, and the complexities associated with both. Consideration was given to working in a way that valued mutuality, respect, integrity and shared responsibility (see Appendix 2), all of which are likely to have fostered an atmosphere in which deep discourse could take place. And indeed, it did, but the depth has increased with the passage of time. The continuing development of trust that prolonged engagement in the Group has facilitated has clearly had a significant impact on the women that remain members.

5.6 Ageing, Motivation and Learning

During the introductory chapter, the significance of ageing to the Group was mentioned. Unlike Chen and Chih's (2012) inconclusive findings on gender and motivation (see 2.3.v), their study does establish that age is an important factor in an individual's motivational orientation. That which motivates individuals changes as people get older: there is a shift in focus from career-development and competitive achievement towards self-realisation, personal development, and learning activities for stimulation and social interaction. Chen and Chih’s investigation centres on organised, post-graduate learners in formal educational settings but there is clearly a parallel between their findings and the data relating to the Group in which the shift from professional to personal development is mirrored.

Perceptions of learning in the Group, how individuals understand and use the terms learning and knowledge, are clearly relevant to this study. The language used by Group members when referring to both varies between individuals and has changed over time. Nevertheless, there has not really been any divergence from Hill's (2008) contention that it 'is the process of making sense of experience' (ibid:89), regardless of whether those experiences are professional or otherwise.
The data for this study includes numerous references to learning from Group members and, again making use of Biesta et al’s (2011) helpful summary of learning metaphors, individuals talk about learning as acquisition, participation, constructed or becoming, and knowledge as objectified or not. At its outset, some saw the Group as a forum for meaning-making whilst others were more focused on transferable learning - learning about things that they could use in their practice. This latter perception of learning implies an acceptance of an additional metaphor, that of transfer as learning (Hager and Hodkinson, 2009) and, perhaps, that it is the learning that does the moving rather than the learners. This is not evident in the way that members now talk about the Group and their learning (see 4.5.1). There is an expectation amongst members that they will ‘stay the course’, ‘grow old together’ and that learning will continue until life ends ....

‘the turning point for me was X saying ‘but I thought you were all going to come to my funeral’ (see Appendix 11).

Use of the term ‘becoming’ in the Group (see 4.6.i) clearly resonates with Biesta et al’s (2011) metaphor of learning as becoming and the notion that if this is the metaphor used, the only end point is death (Hager and Hodkinson, 2009; Biesta et al, 2011). The Group’s ‘holistic’ approach now embraces a much wider agenda than during earlier years and encompasses both the formal and informal aspects of Group weekends. This is now favoured within the Group as it adapts to accommodate the personal transitions of its members. Dillenbourg (1999) notes that whilst goals might be made explicit during the formation of collaborative learning groups, making members aware of individual and mutually shared goals, ongoing negotiation and revision is likely to be necessary as work progresses.

Despite ageing and the decreasing centrality of work in the lives of some Group members, learning remains important to them (see 4.4.iv): the Group is not just about providing opportunities to socialise and enjoy each other's company. What the data emphasises is the importance of the developed holistic approach to current Group members; this is now more significant to them than having an opportunity to participate in a community of professional practice. I have no doubt that all of the women in the Group would agree with Hill’s (2008) description of learning as ‘a lifelong adventure’ (ibid:89); indeed, one woman describes Group members as ‘life-time learners’. What is also apparent is that the processes of
reconstruction and transformation are two-way and ongoing. Participation in the Group alongside other learning experiences has enabled its members to learn and transform (see 4.8.i). In turn, the Group itself has been reconstructed and transformed to meet the widening goals of its members. Neither of these transformational processes are seen as concluded by Group members but, instead, are accepted as ongoing. What is most significant to the Group and sustains membership and motivation to participate is the broadened scope and flexibility of its agenda - what is learned about - so that it remains relevant as members negotiate the transition into later life.

5.7 Group Composition

The all-female membership clearly attracted participants to the Group; they identified with women whom they perceived to be holding their own in a male dominated, professional arena. There was also common ground in respect of work experience, expectations of what the Group might offer and the values that members shared. The notion that every situation an individual encounters offers a learning milieu was mentioned in Chapter 1. The relationships between learners and the milieu, and learners with each other are complex. A crucial element of this complexity is the learners’ interpretations of what is happening as a result of these relationships, both within themselves and within the milieu (Boud et al, 1993). Despite the common ground, there was a lack of connectivity between some members, which can act as a barrier to participation (Guldberg and Machness, 2009). Connectivity can be very weak throughout a group with no one experiencing a significant feeling of belonging, or just one member might feel unconnected either to the rest of the group or another, specific individual (ibid).

For those women that remain in the Group, wanting to belong and to identify with the other Group members contributed to their reasons for joining the Group and the connections established have been instrumental in sustaining their membership. However, as already remarked upon, of the three women who left the Group, two mentioned experiencing a personality clash with someone else in the Group as an issue. This was the main reason for leaving for one of these women and significant for the other (alongside the change in Group focus from professional to personal development). This mirrors Beckingham’s (2007) findings
that personality difficulties can be problematic in group work in formal educational settings. Only one of the remaining members mentioned a personality clash and this was something that she had observed between two other women. Interestingly, whilst current members see differences between individuals as something to be valued, the two past members who mentioned personality differences with others appear not to have felt safe enough to accept them or challenge them; they saw the differences as insurmountable or unwelcomed. This raises a number of questions. Does tolerance increase with age? Does the length of time we know people enable us to accept difference more easily and see it as valuable rather than threatening? How do we develop the resilience to persevere in relationships with people with whom we do not agree, or move from a perception that difference is too difficult to contemplate to one where we relish the challenge that it brings?

‘The individual differences between learners cannot be overlooked or neglected. The individual who is insecure or unsupported may not be able to overcome emotional barriers to learning and development’, (Segers and de Greef, 2001:47).

Relationships in the Group have now developed to such an extent that its members experience ‘unconditional acceptance’, despite differences. However, more could perhaps have been done to support those women who experienced the differences between themselves and others as problematic. In facilitated groups, such support would be provided or initiated by the facilitator, as one past member highlights in her responses to the questionnaire. In a self-facilitated group this is a shared responsibility which, again, warrants attention during grounding. It is justifiable to ask “what will we do if people don’t get along with each other?” Perhaps, though, it is easy to forget to address this as a potential issue of the future if the commonalities between group members, rather than the differences, provide the focus for formational discussions. The Group did not consider this as a potential problem, possibly because of a reluctance, conscious or not, to dampen the excitement that the commonalities generated. On the other hand, the data indicates that the longevity of the Group coincides with a growing acceptance of difference by its remaining members, who see the challenges that it presents as something of worth, despite any associated risks.
It is clear that membership of the Group allowed all participants, both present and past (including the leaver who ‘wouldn’t do it again’), to develop friendships that they value. What is also apparent from their much more effusive comments relating to love, support and security, is that the attachment to other group members is deeper for those women who remain in the Group than those who have left. At a time when people are working longer (Liu et al, 2011) and living longer (AGE UK, 2013; The Guardian, 2014), belonging to a group such as this enables its members to remain intellectually active, whether they are working or not. Potentially, it also affords emotional support to the individual with whom the responsibility currently sits for extending and preserving their own human capital (Biesta and Tedder, 2007).

5.8 Identity, Professional and Personal Development

When the central focus of a group is professional development, opportunities to practise professionally are necessary if practice is to be transformed (Wenger, 1998). This is vital in the process of becoming; becoming more confident and competent as practitioners, or even, retaining earlier levels of competence and confidence as we grow older that may have been eroded through societal inferences that ageing somehow de-skills us. One woman’s declaration that she would not still be professionally active without being a member of the Group (see 4.6.i) clearly demonstrates that it has supported and sustained professional practice.

The decreasing number of opportunities to practise now available to some Group members (through circumstance or choice,) has not diminished their thirst for learning but the main focus of that learning has changed from professional to personal development, as indicated earlier. This does not imply that the two are mutually exclusive. Personal development is inextricably linked with professional practice (Hargreaves and Gijbels, 2011), as one woman argues in her narrative account (see Appendix 10), but the Group’s current emphasis on the personal rather than the professional ensures that the content of sessions is relevant for all of its existing members. Participation in activities which lead us to ‘feel valued’ and contribute to ‘self-esteem’ and a sense of ‘self-worth’ have wide implications. We
need only to be practising human beings to make use of personal learning but it is also relevant to our practice as professionals.

This investigation indicates that membership of a learning group can sustain professional identity, enabling participants to test out their ideas and thinking about their practice before applying them with confidence. What also became clear from the very intense conversations about professional identity during this research is that, despite the Group’s change in emphasis from professional to personal development, their professional identity remains important to Group members. Day et al (2006) note that the professional self and the personal self are unavoidably interrelated; both evolve over time. How people describe themselves in their accounts of their work reflects their self-perception. In this Group, where work has been so central, membership offers a forum for preserving individuals’ perceptions of self as women who are capable of grappling with complex concepts, whether related to professional practice or not.

The data clearly indicates that membership of the Group is now associated with enabling its members to engage with critical thinking and challenging discourse that is both intellectually and emotionally sustaining beyond professional practice. This shift in focus over time has required a realignment of the Group’s members. Wenger (1998) notes that …

‘the process of alignment bridges time and space to form broader enterprises so that participants become connected through the co-ordination of their energies, actions and practices. Through alignment we become part of something big because we do what it takes to play our part’, (ibid:179).

As indicated earlier, the breadth of topics discussed during sessions has increased to mirror the shift in focus, allowing everyone to play their part, and what persists is a perception of self and others in the Group as ‘learning junkies’. All of the existing members agree that participation ‘keeps the grey matter working’, whether what the grey matter is working on is directly relevant to their practice or not. They also see the Group as emotionally sustaining in a way that reflects emotional needs as ‘the complex affective ways in which individual selves interact with others in the social world’ (Elliot, 2008:52). Personal development is associated with self-understanding, self-knowledge and reflexive interactions with
others in the social world, including work-related situations: there is interest in
the Group in ‘me as a person, how I come over’ (Appendix 11).

The broadening range of topics discussed in the Group’s sessions not only serves
to provide intellectual challenge, it also allows participants ‘to deconstruct the
political, economic and cultural frameworks in which we are embedded and
“assembled” as selves’, (Tennant, 2012:11). This in turn, Tenant argues, leads to
self-knowledge or a better understanding of the self.

Membership of the Group is itself a matter of identity and seen as such by some
participants who mention the envy of friends, who are not members but would like
to be. One woman remarks ….. ‘I love that my friends outside also see it as
precious’.

As Hall and du Gay (1996) argue,

‘…. identities are about questions of using the resources of history,
language and culture in the process of becoming rather than being: it is
not ‘who we are’ or ‘where we come from’ so much as what we might
become, how we have been represented and how that bears on how we
might represent ourselves’, (ibid:4).

Whether Group members continue to represent themselves as professionals or not
in the future, belonging to a community of enthusiastic learners in which they feel
‘valued’ and ‘supported’ and that others see as precious can still contribute to the
process of becoming. At the same time, membership of the Group might also
conflict with other identities and such conflict is likely to be ‘more pronounced
when the identities are important to the individual and vice versa’ (Sacharin et al,
2009:276). Issues of compatibility can arise. In the case of the Group, most
members voiced experiencing conflict between attending Group weekends and
their family commitments; a Group member identifying herself as a caring mother
might see her attendance at Group meetings and absence from her family as self-
indulgent and at odds with her parental role. Those who most strongly expressed
this tension between participating in the Group and family obligations were two of
the past members. Although neither cited it as their main reason for leaving, it
clearly contributed towards their decision to go. What appears to have been
instrumental in helping remaining members to negotiate such tensions is flexibility
in respect of logistical considerations (such as the frequency and length of the meetings, where they are held, and scheduling them twelve months in advance).

5.9 Self-facilitation, Self-direction and Transformational Learning

At this point, I suggest that there is little more to say about the Group’s self-direction of its learning. It will have already become clear that there is flexibility to respond to participants’ needs and that this is a complex business when professional, personal, intellectual and emotional needs are thrown into the mix. The data support the notion that learners will take an initiative and pursue activities to meet their goals (see Knowles, 1995, 2011; Van de Wiel et al, 2011; Marsick and Watkins, 2001; Wenger, 1998). In the Group, this is seen as a ‘co-operative’ enterprise and a shared responsibility.

Turning to self-facilitation, again some mention has already been made of the implications of this in respect of dealing with differences in the Group. In the absence of an external facilitator or authority figure, all members of a group share responsibility for ensuring that ground rules or group protocol are agreed and observed in order to establish a safe learning environment (Baumgartner, 2001) in which people feel free to be honest about what they do not know (Billet, 2011). Ground rules were agreed by the Group but, as already indicated, grounding might have included more extensive sharing of opinions and ideas relating to leaving, individuals’ socio-cultural positioning and learning preferences. During this research consideration was given to levels of safety in the Group and whether it enabled transformational learning. Current members agree that they feel safe and experience ‘unconditional acceptance’ from other members which allows them to take risks and facilitates transformational learning. For one past member though, this was not the case: whilst she declares that she would not have wanted an external facilitator to be employed by the Group, she suggests that there were times when it was facilitator-less rather than self-facilitating (see 4.6.ii). This viewpoint is not echoed by current members and perhaps the passage of time and the periodic reviews in which the Group has engaged since that person left have enabled the self-facilitating process to be refined. Current participants acknowledge that the rotating role of Chair is critical to the Group’s functioning but
only insofar as managing the structure and keeping the Group on track and to time is concerned. It is a chairing role rather than facilitation.

As already indicated, the Group's ground rules are seen as ‘invaluable’. They are perceived as ‘us expressing a certain spirit’ and have been implicitly observed in the way that Group members behave with each other, regardless of whether they are able to remember them in any detail. The Group’s ground rules go beyond the more mechanistic considerations referred to by Dillenbourg (1999) but do not ignore them. One woman remarked that ‘changing the format and regularity of meetings – that helped me to stay [in the Group]’ (Appendix 11). During analysis of the data, it was also noted that openness and reflection are frequently highlighted as important in allowing frustrations to be aired in the Group, and changes to be made in response to those frustrations.

As a self-facilitating group, no one person is responsible for these elements of group work; there is symmetry and ‘we all do it’. If the lifespan of the Group is anything to go by, this appears to be working. When individuals have expressed their frustrations in the past or ‘had a wobble – they’ve become a catalyst to us saying, what do we need to do differently?’ (Appendix 12).

‘In fostering transformative learning efforts, what counts is what the learner wants to learn’ (Mezirow et al, 2000:31) and, for current members, the Group has adjusted to accommodate changes in this, as discussed earlier in this chapter. It is also clear from the data that Group members value the time spent together outside of the scheduled sessions and see this as part of the ‘holistic’ learning milieu which, in its entirety, has resulted in the high levels of trust that current members experience. During each weekend, planned sessions are sometimes reviewed at their end but Group members always reflect together on the entire weekend, including both planned and unplanned activities. The scheduled check outs at the end of each meeting therefore provide an opportunity for group reflection on the whole experience of the time spent together.

Reflection alone though is not enough; individual transformation requires a learner to act on the insights that are revealed through reflection (Mezirow, 2000).
The action and associated transformation rests with the learner; this is surely a case of \textit{no one can do it for them}. The self-directed, self-facilitated nature of the Group mirrors this assumption that the onus for transformation rests with the learner. At the same time, the flexibility of the Group, the mutual support and respect amongst its members, and the negotiated nature of both the content of sessions and the Group's processes assist transformational learning.

\textbf{5.10 Chapter Summary}

In this chapter I have concentrated on what I perceive to be the key themes identified during analysis of the data that respond to one or more of the questions posed by this research. It has not been an easy task; the wealth of data has exceeded the scope of this study. Some data whilst not relevant to the questions posed were nevertheless interesting and I hope to return to them in the future. Also, those data that were of relevance and interest have not been discussed in as much detail as I would have wished. The Group’s longevity and the impact of this on its members as they age together, along with the associated shift in its focus from professional to personal development, and related issues of identity, have received the lion’s share of attention. These are the elements of this study which offer an original contribution to the existing literature.

What might also be of interest to readers is the participative approach employed for this research which, I believe, offers a different perspective to that which is generally found in research methodology publications and, consequently, offers a fresh take on the potential of the approach. The word count restrictions for this thesis inhibit the detail of the discussion on this herein and this is something else to which I will return in the future. Nevertheless, the reflections included in the next chapter and in Appendix 24, together with what has been said about participative research in earlier chapters, should provide the reader with a full enough account to appreciate the associated advantages and challenges encountered during this study.
Chapter 6  Conclusions, Questions and What Next?

6.1 Chapter Introduction

There is strong evidence that in coming years people are going to be working longer and retiring later (Liu et al, 2011). Simultaneously, as a result of the recent global economic climate, there is a decreasing amount of financial investment in professional development, particularly for older workers (CIPD, 2013). At the outset of this investigation it seemed that there was room for alternative approaches to professional development to be considered and this research was undertaken with this in mind. I believe that sharing the experiences of the Group through this participative study moves beyond the understanding that interpretive research usually aims for (Bunniss and Kelly, 2010). Instead, the intention is to offer something useful to others looking for new ways of managing their own professional development or supporting that of others within organisations.

In Chapters 1 and 3, I justified my own philosophical position in the belief that research methodology cannot be divorced from assumptions about truth and reality (Bunnis and Kelly, 2010; Holst, 2009). In line with the pragmatic assertion that a researcher should choose an approach that best answers the questions they pose (Clark, 1998), I argued that adopting an interpretive, participative approach in this instance would be appropriate. It would mirror the collaborative modus operandi of the Group under scrutiny, and the participation of Group members would provide more reliable responses to the research questions than those afforded by my interpretations alone (Finlay, 2006).

‘For the pragmatist, the results of research are accounts of connections among natural facts, social facts, intentions and purposes - accounts that practitioners can draw on in their own enquiries’, (Floden, 2009:493).

This case study offers an account of the connections between learning, identity, sustained membership of the Group and more, which others can draw on if they wish. The longevity of the Group has afforded a unique opportunity to make an original contribution to what is already known about collaborative learning groups, particularly the impact of long-term membership on group participants.
However, there was never any suggestion that this study would provide a model that could be immediately utilised by others because …

‘Learning to use an idea in one context does not guarantee being able to use the same idea in another context: transferring learning from one context to another requires further learning and the idea itself will be further transformed in the process’, (Eraut, 94:20).

In Chapter 3, I anticipated that this research would culminate in the development of questions rather than provide a truth, no matter how truthful it might be. During this chapter my intention, therefore, is to summarise the main findings of this study and include a series of questions that those interested in collaborative learning might ask of themselves, or in the case of facilitators or employers, ask others. These questions are raised in each section and summarised in Table 7 (see 6.5).

Although the initial focus of this investigation was professional development, the findings endorse the potential and relevance of collaborative learning beyond professional development. This has been described as personal development earlier in this thesis and also encompasses the emotional support that Group members have increasingly come to value as the life-span of the Group has extended. The questions posed in this chapter are therefore intended to have wider, heuristic relevance for collaborative learning groups, rather than just those associated with professional development.

The implications of the original findings from this investigation for future research are also highlighted in this chapter; these are included at the end of each section, where relevant. As mentioned at the end of Chapter 5, the limitation of 50,000 words necessarily curtails discussion of data that is peripheral to the main research questions here. Nevertheless, further questions have been raised through this research which I believe are worthy of future attention.

Finally, this chapter also includes some reflection on the participative approach adopted for this research. Although brief, this is intended to complement earlier descriptive and discursive (see glossary) sections on participative methodology with a view to elucidating both its merits and its challenges. Having experimented
with this approach, I am convinced that it has potential application as a best fit in a variety of research contexts where there is a desire to reduce the power differential between the researchers and the researched.

6.2 Group Composition, Grounding and Ground Rules

Group composition is an important consideration during a group's formation. The all-female, closed nature of the Group and the common ground or alignment of its members is strongly associated with deepening discourse and the Group's longevity. These elements contributed to individuals identifying with the Group at its outset but there are both advantages and disadvantages associated with closed groups. Group members acknowledge that without movement in and out of a group there is a danger of complacency developing but believe that the advantages of remaining closed have outweighed the disadvantages. In forming collaborative groups, alongside the wider questions relating to group composition and alignment, there is a need to ask whether an open or closed format will be most appropriate. If a decision is made to form a closed group, sharing practice with others can still be considered, as the Group identified during this research. However, how such sharing might be affected requires further investigation.

Depending on a group's agenda, some thought should also be given to the 'complementary connections' (Wenger, 1998:110) that members might already have, or could develop, which will support the work of the group, including contributions from visiting 'speakers'.

The participation of past Group members in this study has enabled comparisons to be drawn with remaining members that relate to alignment. It is evident that alignment and realignment between participants in a group is important for its continuation but is not always possible. 'Learning changes us' (Jarvis, 2006:26) and when the focus is on professional or personal development, as for the Group, this is clearly the case. Over time, goals and expectations change, reflecting changes in our circumstances in addition to those changes brought about by learning. In response to such changes in the Group, frequent realignment has been necessary and the Group’s agenda has been adjusted: learning for individuals has been
transformative (see 4.8.i) and the Group itself has changed to meet the widening goals of its members.

The development of self-knowledge can surface challenges associated with alignment of which we may have previously been unaware (Billet, 2011), and which might not allow authentic participation in a group to continue. Those who experience misalignment or a lack of symmetry are likely to leave unless the whole group is allowed an opportunity to consider that misalignment openly, and explore other options through a reflective review process. Even then, leaving might be the route chosen but, as this study indicates and the existing literature fails to highlight, contemplating how both leavers and stayers negotiate leaving should be included in formational discussions. In other words, there is a need to ask and agree at its outset how a group will manage the departure of members who decide to leave at some later point in time.

Thoroughness and openness during reflection are clearly critical to sustaining membership of a group and enabling it to work. Groups that become fortresses in which misaligned members feel trapped are unlikely to remain intact. What is also clear from this investigation is that formational discussions or grounding need to be similarly thorough, as does the construction of a group’s ground rules. Given that ‘no practice or norm can fix the ways [a group’s] participants will act’, (Bevir and Rhodes, 2005:171), reflection on the ground rules and how participants act in a group is a matter for inclusion in the ground rules. In initiating the formation of a collaborative group, questioning the thoroughness of grounding, the construction of ground rules (including how the group will reflect on its own practice,) and the participants’ alignment are strongly recommended.

This study highlights that an alignment of what individuals want to learn about in group situations, and regular realignment to respond to changes in this, are both fundamental to sustained participation. Conversely, it is clear from the contributions of past Group members to this research that experiencing misalignment in this respect significantly influenced their decisions to leave the Group. The motivation to learn, according to Wlodowski (1999), is associated with an individual’s need to find learning activities meaningful and of benefit.
Initial alignment and subsequent realignment in the Group has involved finding meaningful and beneficial learning activities which suit everyone. For those members that remain, this does not mean that all activities are likely to be equally meaningful or beneficial. Sustaining the Group and keeping it intact is now a critical part of members’ alignment. Indeed, as one member articulates:... 

'The group is important enough to people for individuals to accommodate where we are now' (see Table 3).

In general terms, individuals in the Group believe that their own goals are being met and, integral to these goals, is continued membership of the Group. It seems safe to suggest that any collaborative group with an intention to sustain membership will need to regularly address the alignment of participants. The questions asked in relation to individuals’ initial goals will need to be reiterated during the group’s life span to ensure that those goals are revised and realigned.

**Areas of originality with implications for further research**

- Ways of sharing practice for closed groups: whilst this study has identified some striking benefits associated with the Group remaining closed, how practice might be shared without fundamentally changing its modus operandi has yet to be considered.

- Leaving groups: the results of this study suggest that there is a need to discuss the prospect of people leaving groups and how this might be handled during formational discussions. No additional conclusions have been reached through this research about how the impact of leaving on everyone involved in a group can be minimised but this warrants further investigation.

**6.3 Self-direction and Self-facilitation**

Turning to the efficacy of self-direction and self-facilitation: implicit in the previous section is that a group will be self-directing; that is to say, it will determine its own learning focus. Whilst that focus is bound to be culturally and socially influenced and positioned (Hayes, 2001; Lave and Wenger, 1991), self-
direction is a central feature for the Group and assumed to be equally central for other collaborative learning groups. It does not preclude other people being invited to contribute to specific sessions (see 6.2), even for a closed group if its participants agree to this. As indicated above, what is evident from this investigation and has been critical to the Group’s continuation is the internal recognition and acceptance that what its members are interested in has changed, and that there has been enough flexibility to accommodate those changes. Self-facilitation, on the other hand, needs to be given explicit, careful consideration when new groups are formed and should not necessarily be taken on lightly.

Members of the Group generally agree that whilst self-facilitation has been appropriate and effective in enabling them to achieve their goals, the data indicates that it can also be problematic. We all have our blindspots relating to the needs, values and assumptions that we and others use to frame a situation (Marsick and Watkins, 2001). A facilitator who is positioned outside a group is perhaps more likely to notice such blind-spots and offer insights that are relatively impartial, compared to those of other group members in a self-facilitating situation. In any event, assumptions about what self-facilitation means and how it might be approached need to be avoided to ensure that issues such as misalignment are addressed. Again, this points to a requirement for thoroughness, this time in respect of maximising clarity during grounding. It also highlights the need for collaborative groups to question the benefits and disadvantages of self-facilitation before deciding on their own preferred approach.

**Areas of originality with implications for further research**

- Self-facilitation: this study set out to investigate the efficacy of self-directed and self-facilitated groups in achieving ongoing, transformative, professional learning. Whilst the findings demonstrate such efficacy in respect of the Group, further research focusing specifically on self-facilitation would strengthen the knowledge base and, potentially, allow for the development of a model for self-facilitation that groups could utilise as a heuristic device.
6.4 The Group's Longevity

Perhaps the most striking finding from this study that offers an original contribution to the knowledge base is the mutuality between the Group's longevity and the depth of learning experienced by its members. The primary focus of the Group was the professional development of its participants. It has continued to support and enable professional development throughout its lifespan. Indeed, one member believes that without her ongoing participation in the Group she would not still be working.

As members have aged though, there has been a significant shift in the Group's focus which has segued from professional development to something much broader. Membership of the Group has undoubtedly contributed to and sustained the professional identity of its members, both in respect of how they see themselves and how they see themselves reflected in the eyes of others. Participation in the Group continues to be valued by its members for the 'identity work' (Watson, 2008) that it facilitates, but such identity work (see glossary) is now more about sustaining members' perceptions of self as women that are capable of complex, critical thinking, who still take risks and who respond to challenge. For some, this is particularly important as they move out of full-time work and try to navigate their way through issues relating to not being professionally employed. Current members believe that the Group's longevity provides an 'atmosphere of .... trust' (see Appendix 10) that allows risk-taking and a level of openness that they do not experience elsewhere in their lives.

The longevity of the Group has also facilitated deep attachments between its members, despite the differences between them: tolerance and the acceptance of differences appear to have strengthened over time so that, as long as there is alignment in respect of the purpose of the Group and its direction, misalignment of other, 'lesser' things can be managed. Any major differences that have occurred amongst the Group’s current members have 'become a catalyst to us saying “what do we need to do differently?”'. The longevity of the Group and the associated depth of discourse in which its members have engaged have led to 'robustness .... we can roll with the punches, kind of thing’. The 'thoughtful and sensitive support' that is given and received is seen as 'very powerful'. Learning remains central but
the Group’s shared past and collective identity brought about by its longevity are now as instrumental as its initial raison d’etre in sustaining participation and helping the Group to work.

Whilst no one in the Group initially envisaged that it would remain intact for such a lengthy period of time, doing so has resulted in robust, deep attachments and unanticipated benefits for its members. These include receiving emotional support during transitional periods, particularly from full-time professional employment to a post-employment stage of life.

Perhaps the starting point in a questioning process for any initiator of a collaborative learning group, whether within an organisation or without, is ‘what is its purpose?’ Is the intended focus professional development, personal development, a combination of the two or something else entirely? At the risk of sounding overly dramatic, is it about forming enduring attachments that support the process of becoming until life ends?

A second question might be ‘what level of engagement is desired; superficial exchanges or something deeper that is likely to lead to transformational learning?’ Given the importance of self-direction highlighted in the literature (see Jarvis, 2006; Stanley, 2011; Knowles et al, 2011) and confirmed in this investigation, those who are likely to be participating in a group are surely best placed to provide answers to these questions. When talking about the options that older, employed workers have for training and development, Liu et al (2011) suggest that the only decision open to them is whether or not they should attend the provision on offer. It is evident that this is not enough: regardless of age or whether people are employed by others or self-employed, they will be more engaged in learning activities if much of the associated decision-making rests with them.

**Areas of originality with implications for further research**

- Self-direction and decision-making: this research demonstrates that decisions relating to an individual’s professional development can sit with the individual and remain outside the managerial discourses within
organisations. This is relevant for people regardless of their employment status: the route chosen by the Group is open to the self-employed or employed. What is less clear and warrants further investigation is how organisations can redress the decision-making issues identified by Liu et al (2011) to enable greater self-direction for employees.

- Identity and identity work: this research draws attention to the identity work that can be accomplished in a group where there is appropriate support and trust. It also surfaces the potential centrality of learning for some people in their identity work. Whilst there appears to be a growing number of publications on identity work, I have not managed to locate any research that specifically addresses this in relation to the transitioning of older women from professional employment or, indeed, investigates opportunities or forums for identity work for older people (such as U3A) in any shape or form, with or without learning as a central component.

6.5 Who could use this approach to collaborative learning?

Interactive and more participatory approaches to education serve to democratise it (Kellner, 2003) and I would suggest that the same applies to non-formal or informal learning situations. Membership of collaborative learning groups could be open to anyone who sees value in sharing practice and experience with peers. However, active and full participation in meaningful discourse requires individuals to feel free from coercion and to be open to alternative viewpoints (Mezirow, 2000): this is an important consideration, regardless of whether a group is self-initiated or initiated by an employer or educator.

From a practical perspective, it is necessary to acknowledge here that the Group’s ability to function as it does is in no small way due to the circumstances of its members. The logistical considerations of belonging to a group that is geographically dispersed have proved challenging for most of the Group, to a greater or lesser extent. Having access to a vacant house or being away from home for a weekend when one has small children, for example, relies on the co-operation of partners or other supportive adults. On the whole, members of the Group have been extremely fortunate in being able to negotiate the tensions between their
participation and other important facets of life, but this has not always been the case.

What is clear from this study is that spending time together when not working at learning is seen as making a significant contribution to the whole learning experience. This ‘holistic’ approach is highly valued by the Group and believed to lead to unanticipated learning, amongst other things. Timings have been adjusted over the years to accommodate members’ circumstances but the time spent together has always entailed an overnight stay. Nevertheless, I would suggest that there are many other ways in which a group might create a forum that facilitates this more holistic approach to collaborative learning. Each group must be creative in this respect. As Stanley (2011) insists ....

‘Effective professional development is not as simple as .... casually sharing ideas in a circle. Rich professional development requires attention to a number of characteristics’, (ibid:77).

This observation is relevant to any group, whether self-formed and self-facilitated or instigated by or within organisations for employees. At a time when financial constraints place limitations on the investment that many organisations are able to make in the development and training of their staff (CIPD, 2013), it would seem that collaborative learning groups offer an affordable option. As with groups of individuals though, it should not be assumed that the conditions required for such groups to be productive will occur without paying attention to the various considerations already highlighted in this study, particularly the need for self-direction.

Areas of originality with implications for further research

- Holistic learning environments: the data generated during this investigation emphasises the value that Group members place on the holistic approach to learning that it has embraced. Although other groups are urged above to be creative in considering how they might formulate their own holistic learning environments, at this point the only precedent that can be offered is the route taken by the Group. This is unlikely to offer a
panacea for all collaborative learning groups and further research into other approaches might be helpful for forming groups.

### 6.6 A Summary of Questions

There is no magic formula for setting up collaborative learning groups but group initiators can at least be guided by the questions posed in this Chapter. It is perhaps useful at this point to return to Kipling’s honest serving men (Appendix 5) to supply the over-arching questions, summarised in Table 7, that provide a starting point for the more complex considerations already specified.

<table>
<thead>
<tr>
<th>The Question .......</th>
<th>....... and what the Question should address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why?</td>
<td>The purpose of the group, its aims and objectives.</td>
</tr>
<tr>
<td>Who?</td>
<td>The composition of the group, including the number of participants.</td>
</tr>
<tr>
<td>What?</td>
<td>The group’s agenda, its focus and the content of meetings.</td>
</tr>
<tr>
<td>How?</td>
<td>The group’s structure and processes, including facilitation, grounding, chairing, record keeping, degree of formality and whether it should be closed or not.</td>
</tr>
<tr>
<td>Where?</td>
<td>The venue for meetings: dependent on why, who, how and what and including availability, accessibility, associated costs and suitability for group work.</td>
</tr>
<tr>
<td>When?</td>
<td>The frequency and length of meetings, also dependent on why, who and what.</td>
</tr>
</tbody>
</table>

Table 7  Setting up a collaborative group - a summary of useful questions
The questions posed for consideration above are relevant for initiators of and participants in both independent groups and those within organisations. It is assumed that responses to these questions will go well beyond superficialities and address the complex issues highlighted earlier in this chapter. For example, a significant amount of attention has been given to alignment in this thesis. The questions above serve to facilitate alignment during a group’s formational stages and realignment during its life span. Whilst there are unlikely to be right or wrong answers to these questions, there are likely to be answers that suit each group at a point in time.

6.7 Reflections on this Study

‘Case studies can take us to places where most of us would not have an opportunity to go’, (Donmoyer, 2000:66).

Although Donmoyer is referring to the researcher in a more traditional sense, that is to say as an independent observer or investigator, the potential scope of case studies that he suggests still rings true for this participative inquiry. Working together as co-researchers has allowed all of us in the Group to think deeply about aspects of our membership, our work and our identity. In turn, this has deepened our understanding and ‘permeated everything’ (see Appendix 24).

As mentioned in Chapter 1 and further developed in Chapter 3, a participative approach was adopted in this instance to reflect the democratic nature of the Group and to strengthen the reliability of the research. It has not been about getting the Group’s buy in ....

‘which frequently has nothing to do with including others in one’s decision-making process but actually involves activities that deceive others into thinking they have a say in a decision when they do not’, (Kilgore, 2001:57).

Instead, as I hope has been evident in earlier chapters, such deception has been absent in this study and I have aimed for transparency throughout.

In this type of research, there is a danger that the dual positioning of the instigators as both researchers and participants might pre-dispose them towards
offering an overly positive take on the findings (Sanguinetti et al, 2005). It must also be acknowledged that the current members of the Group are all clearly committed to its continuation and place considerable value on belonging to it. It is therefore not unreasonable to assume that this further indicates a positive pre-disposition. However, what is also clear from the findings is that we have all attempted to offer balanced responses to the questions and balanced interpretations of those responses. Further, the involvement of past members has served to counter the more effusive position that current members sometimes adopt.

Like other participative investigations, there was an intention to confront the potential power dynamics that Seale (2010) believes are located within research relationships. Unlike other participative investigations, this was not an attempt to address social injustice: this is participatory not emancipatory research. Nevertheless, as envisaged, taking part in the research has clearly impacted on the Group and on individual members. For current Group members, the project has been ‘affirming’, ‘challenging’ and ‘interesting’; it has ‘demystified academia’ for some and helped others to identify different ways of approaching their own professional practice as facilitators. One past member also commented on how much she had enjoyed reflecting on her time with the Group and how her reflections were helpful to her professional practice. An additional account of the Group’s reflections on participating in the study is provided in Appendix 24, but McPherson’s words are pertinent at this point....

‘To come through the ordeal of excessive complexity, we learners need some sort of self-confidence, courage, resilience or self-esteem, and some willingness to take increasing responsibility for our learning, with the planning, implementation, self-questioning, persistence and evaluation which may be involved’, (McPherson, 2005:711).

Participating in this research has been a challenge but Group members have embraced it in the same way that they embrace other challenges, seeing it as an opportunity to take responsibility for their learning, and to self-question and evaluate. The self-confidence, courage and resilience that McPherson calls attention to have been in evidence throughout as is borne out by the data. What is also evident in the data and has been reflected during this project is the confidence and trust that Group members have in each other.
From my perspective, whilst recognising the limitations of this study as both co-researcher and doctoral student, I generally share current Group members’ views of it (see above and Appendix 24). It has also helped me to ‘make meaning’, as I hoped it would in Chapter 1.

In future research I will continue to adopt a pragmatic approach to data gathering. That is to say, choose an approach that offers a best fit for the research questions. Having experimented with a participative approach on this occasion and wrestled with my own usual inclinations to organise and remain in control, my experience has convinced me of its validity. Should it be the best fit for any future research I undertake I will not hesitate to use it again. Similarly, I offer it for other researchers to consider as a best fit for their own work but would caution that letting go of the decision-making process is not without its challenges!

As indicated earlier in this chapter, this study has raised further questions that I would suggest are worthy of future investigation. I also believe that there is still more to be done with the data generated during this research project and there are some concepts that I have not had room to explore here. Some of these are of particular interest to me and I will endeavour to give them more attention in due course. One such concept is that of ‘emotional capital’ (Gendron, 2004) which, given the numerous references to emotional support and security located in the data, would seem to offer another, relevant conceptual lens through which Group membership might be viewed.

Learning has been central to this study and it has been challenging to navigate the many different perceptions of learning, both in the literature and in the data, whilst retaining some clarity on my own position. Converting my thoughts on to paper alongside those of others, including co-researchers, without blurring the boundaries between the two has been particularly difficult. Appendix 24 provides further commentary on this and it is another area that I intend to revisit, particularly in relation to sharing this experience of participative research.

Completing this thesis feels like drawing another line under the work at a point in time, similar to that mentioned in Chapter 4 when I was referring to the need to
conclude data generation. Of course, after that line had been drawn the Group continued to discuss the data from this study and intends to pursue some aspects further (again, see Appendix 24): that line was more of a milestone than an end point in a journey. Reaching the end of this write-up also feels like reaching a milestone rather than an end point. If I am to remain true to a pragmatic philosophy and this research is to be useful, it is not enough just to submit a thesis. There is still more for me to do and to write: as with the life span of the Group, happily, the end is not yet in sight.
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APPENDIX 1 A PERSONAL INTRODUCTION

(An author biography written in support of the proposal for this doctoral research)

Before offering a proposal for my doctoral thesis, I would like to say something about my own learning journey to date. I will endeavour to be succinct rather than provide a lengthy account of my life history. However, I hope that what I say here will offer some useful background information to help position what I go on to say within the proposal.

I will later identify myself as a pragmatist and this brief personal introduction may help to explain why though, of course, I will discuss pragmatism more appropriately in due course. I have been an enthusiastic learner all of my life but only when I have either enjoyed or been fascinated by a subject or been able to appreciate its application - that is to say, when I have seen or understood how something might be applied or useful to me, whether knowledge or a skill. My initial career path in architecture allowed me to pursue something that I was fascinated by, but that fascination and my enthusiasm for architecture dwindled when I realised that I did not actually enjoy the environment I found myself in. The people with whom I was working and learning - the learning community - became as important to me as what I was actually learning about. This realisation and the desire to work more closely with like-minded people prompted me to reconsider my options and, after further study and more by chance than design, I eventually found myself working in the field of experiential leadership development.

Having had some leadership and management experience myself by this stage in my life proved important, to me at least. As a facilitator of development programmes, my role was and is still not instructional - I do not tell people how to lead or manage others - but my own experience has enabled me to have some empathy with and understanding of programme participants’ experiences, challenges and dilemmas; it enables me to ‘construct’ learning experiences and ask questions that are relevant to learners’ practice as leaders and managers. Much of my own learning about facilitation was itself experiential, observing and working with other practitioners. It was, I believed, extremely important to be both reflective and reflexive as a facilitator (although I would not have been aware of the term ‘reflexive’ twenty years ago). Given the potential (as in many learning situations) for influencing others, the role of facilitator carries a fair degree of
responsibility and, in my view, necessitates an understanding of the ethical and moral implications attached to that. I have given this a considerable amount of thought over the years and endeavour to demonstrate integrity in all of my work.

Over the years, my own competence and confidence has developed, largely due to the feedback I have received from clients and colleagues. Having also trained as a counsellor and mediator en route, I have become increasingly convinced that ‘less is more’ and of the validity of self-direction for learners. However, although I had taken various training courses and joined the group that I propose to study for my thesis (having set myself the target as a self-employed person of doing something that would contribute to my own development every year,) my learning until more recently was still largely applied or vocational. In other words, I did it because it had a practical use or application for me, supporting the work that I was doing in some way by increasing my knowledge and/or qualifications. Even learning more about myself was part of this - I felt that I needed to in order to function as best as I could in my work and in other areas of my life. My choice of masters’ degree (Coaching and Mentoring) also fell in to this category, as did the topic I chose to focus on for my dissertation, but at this point I began to sense a shift in my own enthusiasm for learning. As with architecture, I was very interested in the subject itself and I found myself learning within a disparate group of individuals. However, on this occasion we had some shared goals and common interests and learning with others definitely added to the experience. During my MA programme, learning became something more to me than it had been previously and I really began to enjoy the process of learning itself and particularly being engaged in research. Better late than never! Eventually, I began the Ed D and this shift has continued as I have thought and learned about issues that in some cases neither have direct application in my own practice nor were particularly fascinating or of interest to me. I have still felt engaged and have also appreciated the interaction with others for whom these issues were and are relevant.

And so to my thesis, for which I want to research something that will both enable me to learn (about the subject of the research and the process of researching itself) and produce something of practical use - not necessarily for me but perhaps for others. As I am fast approaching retirement age, it is difficult to justify undertaking
the EdD with a view to progressing my career. But, if at the end of this stage of my learning journey I am able to say that I have learned something, have really enjoyed it and that some of what I have learned is of use in some small way to others, I am confident that I will feel satisfied.
APPENDIX 2  GROUP GROUND RULES


2003 Update (handwritten notes on initial sheet):

Be aware of my assumptions
Share responsibility
Be creative in terms of what we want
Fun - not deadly
Attention to our environment (recycling, no smoking when meeting)
Confidentiality - need to flag, especially corporate stuff
Respect and mutuality
Straight/integrity - honest
Freedom to opt out
APPENDIX 3  A SAMPLE OF ACTIVITIES UNDERTAKEN BY THE GROUP SINCE ITS FORMATION IN 1997

Each weekend meeting includes a ‘check in’ which brings Group members up-to-date with each other's professional and personal situations, successes and current challenges. Each weekend also includes a reflective session or ‘check out’ and planning for the next meeting. The following list includes some of the activities that the Group has undertaken:

- Group and/or 1:1 coaching - responding to individual requests
- Decision making using a medicine wheel approach
- Power in relationships
- Attachment theory
- Tomatis technique
- Marketing exercise
- Using the internet
- Voice workshops
- Health and nutrition
- Play and learning
- Mask making as a method of exploring the self
- Writing creatively
- Reiki therapy
- NLP time lines
- Belbin’s team roles
- Myers Briggs Type Indicator
- Ice breaker activities
- Business start ups
- Action learning
- Tchi Gong
- Sculpting
- Life stories through art
- Exploring connections and relationships through artefacts
- Dream interpretation and analysis
- Using ‘Linked In’
- Professional presence
- Group dynamics
- Singing workshops
- ‘Triumph of Sociobiology’ - analysis of the work of John Aldcock
- ‘A Fortunate Man’ and other works of John Berger (Ways of Seeing)
- Yoga
- Wine tasting as a team development activity
- Running for beginners
APPENDIX 4 ASSIGNMENT SUBMITTED TOWARDS PROFESSIONAL DOCTORATE IN EDUCATION

Module: EDD612
Helen Goodall    Student Number: 10320455

Which hat fits best: a metaphor for negotiating meaningful professional identity?

Abstract

This paper investigates identity theory and the tensions, advantages and meaningfulness that might be associated with acquiring multiple identities, particularly in respect of pursuing a portfolio career. Using hat-wearing as a metaphor and drawing on the writer's own experiences and observations to provide examples in practice, identity is explored in relation to learning and roles. The significance of role definition emerges with emphasis on what people do, as does the need for constancy or a ‘substantive self’ to facilitate movement between a number of settings or ‘communities of practice’. Different theoretical perspectives are intentionally drawn on to position both identity in general and professional identity.

Introduction

In the twenty three years that have elapsed since I began a training, coaching and mediation business, I have encountered an ongoing requirement to be the wearer of many hats in respect of fulfilling multiple roles. There has been an over-riding need to be a business woman and retain a watchful eye on the 'market place', quality, profitability and the commitment and competence of the associates that work with me. This has led me, in turn, to affiliate with organisations like the Federation of Small Businesses (FSB) and to participate in a variety of forums to maintain a business profile, keep myself informed and learn from others. In addition, as client organisations require, I wear the hats of consultant, coach, mediator and facilitator, depending on what I am contracted to provide. In fulfilling these roles, relationships have been created with other professionals engaged in similar work and I have also joined organisations like the European Mentoring and Coaching Council (EMCC). More recently, I have acquired an academic hat, or mortar board. Undertaking a Masters’ degree in coaching and mentoring several years ago stimulated a personal interest in research that has led
to a part-time academic post and resulted in further affiliations with groups and individuals that are associated with higher education. Hence, to a greater or lesser degree, there has and continues to be an involvement with a number of communities of practice, (Lave and Wenger, 1991), each of which is different, has a different focus or purpose and, as suggested by Wenger (1998), requires different forms of participation from its members. Yet in each of these communities learning is central, whether implicit or explicit, which is perhaps unsurprising given that the main focus of all of my work is the facilitation of learning in some shape or form.

In the course of the staff development work that I do both with individuals and with groups, the issue of how people see themselves, their roles and their relationships is frequently central. Membership of communities of practice such as particular teams, action learning sets or wider groupings of people including specific departments or companies is generally prized. Membership of multiple communities appears to cause concern for individuals who struggle with the movement between communities that may have different and sometimes conflicting priorities and practices. At the same time, multiple membership expands the opportunities for both individual and community learning and development (Wenger et al, 2002).

In addition, it seems that people like to be clear about their roles and know what is expected of them (Belbin, 1993; Bray and Brawley, 2002). A particular example of this usually arises when I train mentors who then go on to work within their organisations’ internal mentoring schemes. The ongoing issue of defining mentoring as distinct from coaching, for example, causes much anguish as definitions of both coaching and mentoring are many and varied (Jackson, 2005). Concern is often expressed by aspiring mentors that there is an absence of an agreed, all embracing definition that can be used to describe their mentoring role to others and distinguish it from their other work place activities.

Of course, all of us wear numerous hats for aspects of life other than work (Burke and Stets, 2009) but it is professional hat-wearing which I wish to explore here. In particular, and without intending to be trite, this paper looks at the challenges, opportunities and meaningfulness that might be associated with multiple hat-wearing and the individual’s capacity to distinguish which hats fit best. It does this through the lens of identity theory, exploring the concept and its origins, some of
the implications of multiple identities and the associations between role and identity. Attention is also briefly given to the relationship between learning and identity and to the role of communities of practice in the construction of professional identity (Bathmaker and Avis, 2005).

**Methodology**

This paper adopts an interpretive approach, referring to a range of literature that is relevant to identity theory to provide a framework through which to explore and examine practice-related issues. Perspectives offered by psychology and social theory are utilised, reflecting on occasions what might be considered as somewhat contradictory ontological positions. This should not be taken as an indication that distinctions have not been recognised but, instead, that there is a deliberate attempt to bring together the useful and relevant insights and contributions provided by each of the different perspectives. There is no intention to argue that a social perspective is more or less valid than a psychological perspective, or to merge the two. Rather, the intention is to attempt to remain open to a range of ideas with a view to achieving greater insight, recognising that inquiries accessing opposing viewpoints can be fruitful (Brown, 2001; Sfaard, 1998).

At certain points in this paper, reference will be made to a number of my own experiences and observations with a view to illuminating the theoretical aspects of identity that are explored. Both the practical examples used and any theoretical positions referred to in this paper will have been subjected to a process reflecting only *my* interpretation of those situations and theories.

As Wenger (2009) points out, “A perspective is not a recipe” (ibid, p.215). We each interpret reality based on our own values and ways of seeing the world (Fisher, 2007) and ‘there is no perception which does not involve an unconscious code’ (Bourdieu, 1984, p.3). Therefore, the reliance on my own interpretation of both theoretical perspectives and my experiences and observations should be seen as a limitation of this paper.

**Learning and identity**

Illeris (2002) suggests that learning includes a …

“cognitive dimension of knowledge and skills, the emotional dimension of feelings and motivation, and the social dimension of communication and co-operation - all of which are embedded in a societally situated context” (ibid, p. 396).

Walsh and Jenks (2010) argue that an individual's view of learning is grounded in his or her personal epistemology and the research tradition to which he or she
subscribes. This argument is supported by Illeris (2009) who asserts that the many views and theories about learning that have emerged over the last century have developed from a range of ‘epistemological platforms ... [with] ... very different content’ (Illeris, 2009, p.7). Such theories are too numerous to be explored within the confines of this paper. However, it is difficult to argue with the assertion that people are inherently 'social beings' (Wenger, 2009, p.210). In addition, Illeris’s positioning of learning as a situated, social activity is strongly reinforced by others (Lave and Wenger, 1991; Downs, 2010; Jarvis, 2009; Eraut, 2007,) and, again, presents a difficult point with which to argue. Indeed, an acceptance of this stance has been a fundamental influence in my own practice as a facilitator of learning, and my observations and experience have reinforced this.

Wenger (1998) describes people having ‘shared histories of learning ...a combination of participation and reification intertwined over time’ as ‘communities of practice’, (ibid, p. 87), suggesting that it is within the environment of such communities that the negotiation of both identity and meaning takes place. Without explicitly placing learning at the centre of this study, there will be some mention of it in the practice examples referred to and an underlying assumption that learning and identity are inextricable (Wenger, 1998). Any discussion of identity that follows in this paper infers and acknowledges this relationship. Similarly, it will not be possible to enter in to a debate about what constitutes a community of practice. Consequently, there will be little differentiation between the term ‘communities of practice’ and other terms that are used to describe situations in which individuals join together for the purpose of learning, such as peer support groups. The intention is to avoid any investigation of what is meant by both 'learning' and 'community of practice', and to focus on identity as a component of learning (Wenger, 2009).

**Identity - a socially constructed concept?**

As Albert et al (2000) argue, it is ‘because identity is problematic - yet so critical ... that the dynamics of identity need to be better understood’ (ibid, p.14) and, indeed, there has been a long-standing examination of identity within social theory. As with theories of learning, the literature is considerable. Identity theory has a variety of roots including philosophy’s existentialism, developmental psychology, social anthropology and the more sociological symbolic interactionism (Day et al, 2006; Collinson, 2003). Whilst there may be substantial differences
between these perspectives, there is generally a shared recognition of the central position of human self-consciousness and the creative potential that human beings have as ‘reflexively monitoring and purposive creatures’, (Collinson, p. 529). In short, people frequently seek purpose and meaning in their lives and do so creatively through reflection and imagination. Wenger (1998) specifically mentions the relevance of imagination as a ‘mode of belonging’ (ibid, p. 173,) that is critical to identity formation as ...

‘the creative process of producing new “images” and of generating new relations through time and space that become constitutive of the self’, (ibid, p. 177).

Whether people acquire meaning in their lives as isolated, self-contained beings or through the process of social constructionism is frequently disputed (Burr, 2003). Despite Burr’s claim that talking of ‘identity’ rather than ‘personality’ avoids the connotations of essentialism (Burr, 2003) that are frequently assumed in association with psychological perspectives, the degree to which environmental or societal influences impact on and influence the individual is also disputed within discussions on personality (Pervin et al, 2005). What appears to be less disputed across perspectives is that meaning and identity are closely associated.

Wenger (1998) refers to identity as ‘negotiated experience’ through varying degrees of participation and non-participation and through reification (or the objectification) of tools, abstractions, symbols and so on that are associated with practice (ibid, p. 49). He describes meaning as ‘a way of talking about our (changing) ability - individually and collectively - to experience our life and the world as meaningful’ (Wenger, 2009, p. 211). Wenger argues that issues of identity are ‘inseparable from issues of practice, community and meaning’, (Wenger, 1998, p.145) and sees the concept of identity as pivotal between the individual and the social, enabling each to be talked of in terms of the other. Collinson (2003) summarises Durkheim’s assertion that individuals are shielded by society and other groups that provide a ‘distraction’ (ibid, p.529), thus preventing people from being overwhelmed by their own meaninglessness. Conversely, whether we choose to call an individual’s involvement in society, groups or communities of practice a ‘distraction’ or not, there is an inference that participation is a way of developing meaningfulness.

In addition, Collinson (2003) describes the post-structuralist criticism of traditional views of the individual as ‘separate and separable’ (ibid, p. 527) and
adopts the argument that the social world and individuals’ lives are ‘inextricably interwoven’ (ibid, p. 528). Burke and Stets (2009) concur with this and use Cooley’s view that ‘the individual and society are two sides of the same coin’ to make their point (ibid, p.3). As Karreman and Alvesson (2004) argue, “identity points at an affiliation with a social group. It confirms the affiliation, and also charges the affiliation with emotional significance and personal meaning” (ibid, p.154).

In my own work as a trainer, the prominence of the individual’s development and learning varies, with some learning interventions aimed at individuals and others at teams, departments or other learning and work groups. However, there is always an emphasis on the importance of situating learning within a context and recognition that what works in one situation is unlikely to work on every occasion. For example, during individual coaching sessions and leadership development programmes, the focus is generally on individuals’ competence and learning as leaders. The models used to explore leadership style concentrate on the complexity of leadership, the importance of flexibility and the need for an awareness of the uniqueness of each situation, work group and working relationship (Northouse, 2010). The aim is to provide individuals with insights into general principles of effective leadership that they can try out in practice, with a view to them eventually achieving a leadership identity that is a ‘lived experience of engagement in practice’ (Wenger, 1998, p.151).

At the same time, the development of self-awareness and reflection is encouraged during leadership programmes through the employment of instruments such as the Myers Briggs Type Indicator (MBTI), which has its roots in trait theory and firmly positions learning with the individual (Briggs Myers et al, 1998). On the surface, it seems that there is a conflict of positioning here in that trait theory purports that traits are with the person for life (ibid), contradicting the constructed representation of identity as something that is constantly being renegotiated (Day et al, 2006; Burke and Stets, 2009, Wenger, 1998, Burr, 2003). However, when traits are interpreted as personal preferences that may, to a greater or lesser extent, influence an individuals’ actions and behaviours, rather than absolute ways of being (Briggs Myers et al, 1998), exercising those preferences becomes an act of negotiation within a community. For instance, I might prefer to make decisions quickly without consulting others but I learn from experience that if I consistently adopt this approach in team situations, it is
unlikely to generate commitment to and ownership of those decisions by the team. Consequently, my personal preferences might be put aside and, through negotiation in practice, I adapt my approach to decision making and find ‘a way of being in the world’ (Wenger, 1998, p. 151). As Sfard (1998) asserts, it is not unusual to adopt a number of theoretical perspectives whilst looking at something - “difference.... is not a matter of differing opinions but rather a participation in different, mutually complementary discourses” (ibid, p. 11).

At this point then, identity could be described as ‘a subtle interweaving of many threads’ (Burr, 2003, p.106), experienced and acquired by an individual through their participation in society (Burke and Stets, 2009), social groups (Karreman and Alvesson, 2004) or their membership of communities of practice (Wenger, 1998 and 2009).

**Multiple identities - tensions and benefits**

Day et al (2006, p. 602) cite Goffman’s theory that ‘each person has a number of selves’, each of which focuses on executing a particular role in a given situation. Wenger (1998) agrees with this, emphasising the temporal nature of identity and seeing it as something that individuals constantly re-negotiate as they move in and out of different communities of practice. On the other hand, Kets de Vries (1995) argues the importance of possessing a stable identity.

It may be significant that Kets de Vries is investigating stability and mental health whilst Wenger is focusing on situated learning. However, although appearing to be at odds with each other, both perspectives offer some insights that are relevant to the management of multiple roles. As Day et al (2006, p. 603,) observe, Ball usefully examines this dichotomy by drawing a distinction between ‘situated’ and ‘substantive’ identity, describing.....

‘the situated identity as a malleable presentation of self that differs according to specific definitions of situations’... and the substantive self as ‘the more stable, core presentation of self that is fundamental to how a person thinks about himself or herself’ (ibid, p.603).

Whilst recognising the difficulties in objectively reflecting on my own participation within the different communities described earlier, there is some resonance with Ball’s distinction. I do indeed continually re-negotiate my identity, adopting the language and behaviours that are appropriate and expected within each context that I find myself. Different situations or communities of practice, which may include client organisations, appear to value and appreciate different contributions and, to return to the hat metaphor, expect different hats to be worn. What may be
appropriate in one community may be ‘inappropriate, incomprehensible or even offensive in another community’ (Wenger, 1998, p.160).

In respect of my own practice, business acumen, practical know-how and pragmatism are required in some instances. In others, knowledge of particular theoretical models will be a pre-requisite of membership, engagement or participation. Yet other communities might expect certain experience, qualifications or perspectives of, say, approaches to learning. However, without some constancy, stability or points of reference from which to triangulate my position, choices and actions, how would I navigate my way through multiple communities and the corresponding identities? A substantive identity appears to provide this constancy. Wenger (1998) introduces what appears to be a very similar idea when he describes a nexus of multi-membership. He rejects the term ‘multiple identities’ that is utilised by others (Burke and Stets, 2009; Ross, 2007,) but his concept of multi-membership appears to address the same issue of allowing individuals to reconcile the different situations or communities in which they participate.

Continuing with the hat metaphor, perhaps at this juncture the substantive identity can be represented as the wearer beneath the hat. After all, surely the wearer of any hat will tilt or adjust it to suit themselves, and what purpose would a hat serve if there was no wearer? This is not to say that someone's idea of what suits them is something that has been developed in isolation. On the contrary, what others think and say may also have influenced the individual's perception. Brown (2001) infers that others' perceptions are as instrumental in determining identity as the individual's own self-perception. Being seen as credible, for instance, might enable an individual to participate in a particular situation or community of practice, but perceptions of what constitutes a credible participant are, as with any other perception, likely to be constructed (Burr, 2003).

In my own practice as a facilitator, trainer and coach, credibility is chiefly established though my previous experience in the respective roles. Initially, testimonies of existing clients and evidence of past successes, particularly those with an identifiable return on investment, are important in gaining new clients. Subsequently, to retain clients, an ability to create rapport with a wide range of people from production line workers to banking executives has to be demonstrated, and both the planned and emergent learning that results either
directly or indirectly from my involvement is important. Essentially, it is what I do that seems to count. In an academic role, other things appear to be more influential in establishing credibility such as theoretical knowledge, the number of publications produced and the academic achievements of learners. Here it seems that what I know is more important.

Hence, in order to participate in different environments with a degree of credibility, it appears that there is a need to change hats. ‘The identity .... selected for presentation is a response to the group’ (Ross, 2007, p.287). This does not infer that there is no overlap or shared relevance between settings. What is experienced and learned through engagement in one situation is likely to impact and influence the nature of participation in others (Wenger et al, 2002).

However, as Colbeck (2008) highlights, an individual is likely to experience stress if two conflicting identities are activated simultaneously, suggesting that some compatibility or shared meaning between identities is desirable. Alternatively, if this is unachievable, it is likely that the most salient identity will take precedence (Stryker and Burke, 2000). Salience, in this instance, implies a choice that rests with the individual which may or may not coincide with what is regarded as most salient at a social or community level. Humphreys and Brown (2002) argue that identity is never only a ‘private concern’ but is

‘intensely governed by ... social conventions, community scrutiny, legal norms, familial obligations’ and so on (ibid, p. 423).

Again, there is an individual-versus-social construction dichotomy but whether agreeing that salience is a matter of personal choice or is governed by social construction, it seems difficult to dispute the assumption that others’ perceptions will have been influential (Brown, 2001) in the decision making process.

Of course, non-participation in particular communities defines individuals as much as participation......

‘Our identities are construed not only by what we are but also by what we are not’ (Wenger, 1998, p.164).

The communities that people choose to belong to are those with which they identify through participation, reification or both (Wenger, 1998). For example, as a coach I have chosen to affiliate to the EMCC, identifying myself as a coach and complying with the EMCC’s ethical guidelines in a ‘reificative process’ (ibid, p.191), whilst also participating by attending national conferences and regional network meetings. Identifying with a number of communities may present challenges such as the incompatibility described earlier, but it can also facilitate development if
and when learning from one situation or community is transferred and integrated into practice in other contexts.

Without wishing to argue whether the term ‘multiple identities’ should be used in preference to ‘multiple membership’, or vice versa, what seems clear at this point is that people engage with a number of groups or communities. The movement between such contexts requires individuals to adapt in order to respond to differing expectations. At the same time, multiple membership or the acquisition of multiple identities can both create tensions where incompatibility exists, and opportunities for cross-fertilisation when practices can be usefully transferred across contexts.

Roles, identities and definitions

Although the terms ‘role’ and ‘identity’ have been used interchangeably earlier in this paper, it is recognised that whilst there is a strong link between the two, they are not the same thing. Merely looking at the differences in and boundaries between roles does not represent the complexities that are described as identity (Wenger, 1998, Wenger, 2009, Burke and Stets, 2009, Day et al, 2006). Burke and Stets (2009) mention the usefulness of role theory when talking about relationships, expectations and behaviours but highlight its disregard of agency and that people are left out of the equation since the focus remains on the actions, relationships and expectations in respect of the role rather than the person. They go on to cite Foote and his recognition of the need for individuals to identify with and become a role in order to generate the motivation, drive and energy to successfully inhabit it (2009, p. 38).

‘Roles are externally defined by other’s expectations but individuals define their own identities …… as they accept or reject social role expectations as part of who they are’ (Colbeck, 2008, p.10).

K’arreman and Alvesson (2004) suggest that whilst there are similarities between the concepts of role and identity, it is through identity that individuals are provided with instruction, direction and personal meaning.

Identities are constructed through a process of identification, as individuals identify with different social networks (Colbeck, 2008). Wenger (1998) coins the term ‘community of practice’ as the forum within which identity resides but emphasises the ‘local-global interplay’ (ibid, p.161). Whilst it may be evident that communities of practice exist in a wider social, cultural and political context, it is not possible to explore the relationships between these contexts and identity.
within this paper. However, it is acknowledged that this effectively excludes
discussion of some potentially significant influences on identity formation (Burke
and Stets, 2009; Giddens cited in Brown, 2001, p.114). For the purpose of this
paper, the focus remains on the juxtaposition of identity and communities of
practice, groups or other gatherings, where people are together to do identity
work (Wenger, 1998).
At this point it is useful to revisit the aspiring mentors who struggle with the
absence of an agreed definition of mentoring. Both role and identity are important
in this context. Clarity of role is useful to talk about mentoring in generic terms,
informing both aspiring mentors and mentees of the potential of the activity and
what might be expected of them. Thus, a definition of mentoring that describes
what it is can provide a label for an anticipated situation, but a definition is likely
to have little meaning in itself (Burke and Stets, 2009). It is through involvement in
mentor training groups and, subsequently in mentor-mentee relationships and in
the mentors’ practice group that mentoring acquires meaning for mentors. It is the
move from talking about something to doing something - or acting. As Wenger
(1998) argues, engagement through both talking and doing is essential for
identification and it is through this process that .....  
“modes of belonging become constitutive of identities ....creating bonds or
distinctions in which we become invested” (ibid, p. 191).
Similarly, when discussing professionalism, Hodgson (2005) emphasises that it is
not only about the possession of the relevant expertise and knowledge but also
involves the ‘enactment of professionalism’ (ibid, p.52). Grant and Cavanagh
(2004) argue that there is a difference between calling someone a professional and
recognising that they are using professional behaviour. Although there is no
intention to debate here whether mentoring is a profession or not, the same
argument appears relevant for aspiring mentors. It seems evident that there is a
difference between calling someone a mentor and recognising that they are using
mentoring behaviour, whether viewed as ‘professionals’ or not. Defining the role is
not enough.
Hodgson goes on to cite Becker’s assertion that ‘to be accepted one must have
learned to play the part’ (ibid, p. 53). In questioning one group of mentors at a
supervision session twelve months after their period of training, it was striking
that those who had been particularly active as mentors were no longer concerned
about defining mentoring. Their identity as mentors had been reinforced by the
perceptions of others (Brown, 2001) and they had also ‘learned to play the part’ by negotiating their mentor identities through engagement. However, without observing them in action as mentors, I am left with a question regarding which part they had learned to play. Was it that of a mentor or that of a member of the peer support group (which could be something quite different,) or both? Listening to their descriptions of what they had actually done in mentoring situations provided some evidence that the former was the case, but this could equally demonstrate that they had merely learned how to talk about mentoring within the peer group environment. My inclination, though, was to assume genuineness in the mentors’ accounts of their activities. After all, what would be the point of trying to feign competence within such a community when other members will later be privy to the feedback and evaluation sheets received from individuals’ mentees? (A unanimous decision to share feedback had been made earlier.) Also, the declared purpose of the peer group was the sharing of experience to enable mentors to learn from and with each other. This had resulted in what I perceived to be an open and honest environment in which people seemed comfortable talking about what they believed were their successes and challenges as mentors, having identified with the group as mentors.

To return to aspiring mentors’ requests for a definition of mentoring, there is evidently a perceived need for a label. As Walker (2004) maintains, there is an issue ‘of certain taxonomic importance, since any discipline needs to be able to define its unique characteristics in contrast to others’ (ibid, p.16).

Taking Walker’s cue, perhaps the way forward is to concentrate on what mentors do that is different from their other roles (for example, as line managers, librarians, engineers or teachers,) rather than what mentoring is. Faced with anxious aspiring mentors in the past, my approach has been to recommend that they discuss what they are going to do with their mentees, negotiating and re-negotiating the relationship to create a shared understanding that establishes boundaries and clarifies expectations. In future, placing more emphasis on developing this understanding in discussions during training programmes may well help to alleviate some of the anxiety and also distinguish mentoring from other roles. Ultimately, though, I believe that no two individuals who take on the role of mentor (or any other role for that matter,) will do so in exactly the same way. This
is where the individual’s identity comes in to play and the distinctions between role and identity are likely to become apparent.

**Conclusion**

In summary, people continually renegotiate their identity as they adapt to different situations (Wenger, 1998). They do so in response to what is expected of them as participants in each situation that they encounter and develop multiple identities (Burke and Stets, 2009) or multiple membership of a number of communities of practice (Wenger, 2002). At the same time, the retention of an underlying sense of a ‘substantive self’ (Day et al, 2001, p. 603) or a ‘nexus of membership’ (Wenger, 1998, p.158,) provides some constancy. It is, it seems, this substantive self that facilitates movement between different situations, allowing each one to be negotiated appropriately.

The very notion of a portfolio career like my own suggests that membership of a number of communities of practice is necessary. What is clear from my own participation in different communities is that, whether by design or not, the learning acquired from engagement in one context frequently influences my practice and can develop meaning in another. This is not always as simple as transferring ‘good practice’ since, in my experience, practices are sometimes so entrenched that bringing an alternative approach or making an attempt to instigate change meets with heavy resistance.

Kelly (cited in Pervin et al, 2005, p. 385) argued that rather than questioning whether complex and well-formulated theories are ‘true’ or not, one should ask what is ‘useful’ about them. To some extent I have attempted to do this in writing this paper. By utilising thinking from both psychology and social theory it could be said that there has been a mirroring of the membership of multiple communities that I experience in my practice, with a consistent leaning towards constructivism reflecting the constancy that I have associated with the substantive self.

As regards the terms ‘role’ and ‘identity’, although these are frequently interchanged there is a significant difference between them. Individuals may take on the same role as others but undertake and experience it so that it is aligned to their identity. Defining roles is important but it is identity that adds meaning (K’arreman and Alvesson, 2004).

Returning to the hat wearing metaphor, it seems that it is not so much a case of which hat fits best, but more about each hat wearer (the substantive self,)
gathering a collection of hats (roles,) from which he or she selects to suit the situation (including communities of practice,) adjusting, and sometimes discarding as they go along, (negotiation and identification,) so that each hat sits well with the person’s identity.

**A final note**

It will have been evident in reading this paper that the work of Etienne Wenger has made a considerable contribution to the discussion on identity. Whilst his work has provided numerous insights that have been incorporated in to what is being offered here, I have struggled with his presentation of certain assumptions and various terms in a way that appears to brook no argument. In response, I have deliberately attempted to use a range of terminology that enables others’ views and theories to be considered on an equal footing to Wenger’s.

**REFERENCES**


I keep six honest serving men

I keep six honest serving men,
(They taught me all I knew);
Their names are What and Why and When
And How and Where and Who...

*Rudyard Kipling*

APPENDIX 6  GROUP BRAINSTORM OF POSSIBLE RESEARCH METHODS & FURTHER INFORMATION ON CHOSEN METHODS

Photograph of original flipchart sheet
Methods Brainstorm

- Mind mapping - spiders
- Brainstorming
- Struct. Unstruct.
- Interviews
- Pairs and/or feedback/loop
- Group discussions - focus groups
- Images and symbols
- Metaphors / creative writing
- Visualisation
- Reporting back / research
- Group sculpts
- Model making
- Cultural models - totems - taboos
- Five whys
- Deepen the enquiry
- Force field analysis

FURTHER INFORMATION/RESOURCES ON THE METHODS EMPLOYED DURING THIS INVESTIGATION

1. Mind Mapping

What is Mind Mapping?

- It is used to find out people’s thoughts, perceptions, feelings (in addition to their knowledge on a subject)
- It is useful for those interested in exploring ideas - it is an exploratory tool
- It adopts an open-ended approach: the intention is to draw out ‘subjects’ through the use of open questions or phrases that are as neutral as possible
- It is important to use language and terminology with which respondents will be familiar
- When mind mapping is used as a group activity it is important that the facilitator or scribe does not filter individuals’ contributions

How could it be suited for research purposes?

- Fun, active way to get responses to specific questions
- Forms basis of open-ended interview (‘conversation’) and can aid with subsequent group discussion
- Can be easily tailored to your research activity
- Helps ‘warm-up’ people and get thought processes going
Would work equally well with children or adults or those for whom literacy might be problematic
• Can give you an insight into people's feelings etc. whilst minimising your impact on their expression of those feelings
• Works well when you have relatively small sample sizes
• Easy to conduct once the process is understood

How does it work?

1. The question is written down centrally on a piece of paper (e.g. a flipchart sheet) and those participating in the activity are asked to call out, write down or draw on the sheet as many words, ideas, phrases or thoughts that come to mind relating to the question (or picture or concept). Further connections to each response can also be drawn in. The writing is frequently done by the facilitator.
2. This mind map becomes the basis of an open-ended informal interview or discussion. Individuals are encouraged to explain (but not justify) why they wrote/drew/called out what they did and to expand on their thoughts and ideas relative to the question or concept. If participants have done the writing themselves, this can be used to check writing/images that the facilitator/researcher can’t read/understand. These responses can be recorded on the same piece of paper using a different coloured pen by the facilitator, using the words of the participants or, in the case of lengthy exchanges, it is useful to record this part of the process.

You can stop at this point and carry out your analysis or continue with a further round of discussion or a reflective conversation that enables participants to comment on the earlier exchanges/others’ contributions and/or how they have experienced participating in the activity.

How do you make use of the responses?

• Can be analysed qualitatively and/or quantitatively
• The idea is to generate rich, in-depth data
• What words/phrases/ideas come up most/least?
• What quotes really illustrate the point well?

For more information on mind mapping see the work of Tony Buzan.

2. Force-Field Analysis

What is Abstract Force Field Analysis?

Abstract force-field analysis is based on a way of thinking about and analysing the forces that support a situation or a proposed change, and those that question the same situation or change; that is to say, the opposing forces for and against [something]. It is often attributed to Kurt Lewin, who saw behaviour in an institutional setting not as a static (motionless) habit or pattern but as a dynamic balance of forces working in opposite directions.
According to this way of looking at patterned behaviour, change takes place when an imbalance occurs between the sum of the forces against change (Restraining Forces) and the sum of the forces for change (Driving Forces). A force-field analysis assumes that any social situation is a balance between these forces. An imbalance may occur through a change of magnitude or a change in direction in any one of the forces, or through the addition of a new force. For further information see Zand, D.E. (2015) ‘Force Field Analysis’, Organisational Behaviour, 11. Available on line via http://onlinelibrary.wiley.com/doi/10.1002/9781118785317.weom110151/abstract

3. **The Five Whys**

This method is reminiscent of a conversation with a small child who keeps asking ‘why?’ It involves posing an initial question to an individual or a group that begins with ‘why?’ In order to get to the root of the respondents’ thinking and drill down beyond the initial responses, ‘why?’ is asked a further four times.


4. **The use of artefacts, symbols and metaphors in research**

For a recent discussion by Rudrow on phenomenological research and the use of artefacts (including colours and dress), see http://www.kon.org/urc/v13/rudrow.html

Also, see Norum in Given, L.M. (Ed) (2008) *The SAGE Encyclopaedia of Qualitative Research Methods*, California: SAGE.

5. **Narrative Research**

Numerous publications on narrative research and the use of narrative accounts in qualitative research are to be found but a useful starting point is:


6. **Semi-structured questionnaires**

Again, there are numerous publications that offer critical commentary and/or advice on the utility of questionnaires, including those that use a semi-structured approach. For a reasonably thorough discussion and suggestions for structuring questions see Denscombe, M. (2007), *The Good Research Guide*, 3rd edition, Maidenhead: Open University Press.
APPENDIX 7  BRIEFING PAPER AND CONSENT FORM FOR STUDY PARTICIPANTS

Ethics Protocol for an investigation entitled ‘Sustainable professional development: a participative study of a self-facilitated learning group’

Researcher: Helen Goodall

This paper sets out to provide potential participants in the above study with the following information so that any consent is given from an informed position:

1. A brief summary of the intended purpose and aims of the investigation
2. An outline of the proposed methods, particularly a description of what is meant by ‘a participative study’
3. An interpretation of ‘informed consent’
4. A statement on openness and honesty
5. A statement on confidentiality and anonymity
6. A statement on participants’ right to withdraw
7. A statement relating to ‘debriefing’ and dissemination of the findings of the study once the research is completed.

It takes into account the opinions and views contributed by potential participants during an initial discussion about the ethical considerations of the study held on 7 October 2012.

A consent form is attached for signature and return.

A brief summary of the purpose and intended aims of the investigation
This study is being undertaken by the researcher as part of her Professional Doctorate in Education at Plymouth University and the final outcome will be a written thesis of approximately 50,000 words.

As an adult learner with a strong commitment to continuous professional development (CPD) and as a facilitator of adult learning, the researcher is interested in group learning for CPD. Specifically, what encourages, influences and motivates people to engage with collaborative learning, what sustains this engagement and the extent to which self-facilitated groups achieve ongoing, transformative, professional learning? Further, what are the implications for
individuals associated with long-term group membership? Finally, if successful learning groups are those in which participants continue to achieve their learning goals, why are only some groups successful and what sustains ‘success’?

The researcher hopes to explore these questions through investigating what has contributed to the longevity of a specific, self-managed, learning group of which she is a member. It formed in 1997 when a number of loosely connected, independent training and development professionals came together to create a forum for their own CPD. Membership, the structure and the processes of the group have changed only slightly since its inception. All members are women and the original developmental focus essentially remains unchanged. It is hoped that past members of the group (i.e. those who have left) will also take some part in the study.

**Proposed methods**

This case study investigation will adopt a participatory approach with the existing group. This infers that those people who are the subjects of the study work together with the researcher to design and agree the most appropriate methods for collecting data in order to address the questions that the study poses. It is research from within the group rather than observations of the group. Whilst the researcher ultimately takes responsibility for the study, a participatory approach offers members of the group being studied a much more active, involved and central role in the investigation. For this research, existing group members were consulted on any concerns they might have relating to ethical considerations and will be involved in the process of designing methods of data collection from and with the group but will not be expected or asked to participate in any writing unless it forms part of data generation. It is anticipated that methods might include group discussions, semi-structured interviews, a range of creative exercises (eg. personal meaning mapping) and the use of tools like Myers Briggs Type Indicator. Past group members are asked to participate in semi-structured interviews but may also contribute by agreeing to participate in other activities that the existing group propose if they wish.
Informed consent

All participants in this study are asked to sign this paper to indicate that they have agreed to participate and understand the nature of the study, their own role in the study, their right to withdraw their participation and their own commitment as co-researchers with Helen Goodall to openness, honesty, confidentiality and anonymity, as described in this paper. Signing the consent form attached to this paper indicates that participants in the study are confident that they are agreeing to become involved in the study from a position of understanding what the study is about, what the data will be used for and what is expected of them as participants. It is stressed that participation in the study is separate to and independent from membership of the group itself.

Openness and honesty

There will be no covert element to this study. No deception of any kind is intended. Participants will have sight of any aspects of the written thesis that they wish before it is submitted by Helen Goodall and may also request to see any data relating to them individually at any point during the study. Any questions from participants will be responded to honestly and in full as long as this does not involve compromising confidentiality requested by another participant in the study and participants will be informed should this be the case.

Confidentiality and anonymity

Every effort will be made by the researcher to preserve study participants’ anonymity outside of the group. The group itself and all participants will be allocated pseudonyms which will be used throughout the written thesis. All electronic data including any conversations or discussions between group members that are recorded for later transcription will only be password accessible. Any hard copies of data of any kind will be stored in a locked cabinet, including signed consent forms which will be stored separately from all other data. Data will be stored for ten years after the completion of the study and then destroyed, in line with current University policy.

The group at the centre of the study already operates to a set of ground rules. These include maintaining confidentiality which is interpreted as not divulging what is said at group meetings to people outside of the group unless explicitly
agreed in advance. This degree of confidentiality will be maintained throughout the study in that individual contributions will be treated anonymously, as mentioned above. In addition, the group and the individuals within it may also censor data about themselves if they believe it is misrepresentative and will be given every opportunity to do so as data is generated. The data generated will only be used for the purpose stated earlier in this paper. Written permission will be sought before any attempt is made to publish or otherwise share this work.

Participants’ right to withdraw
Any participant in this study has the right to withdraw their participation in the study and any data about themselves at any time up until the point that the thesis is submitted. Should any participant wish to withdraw, they should ask to do so without fear of the consequences for the researcher, for the study or for their future membership of the group. Please be reassured that participants’ well-being is paramount and is foremost in the researcher’s priorities. Again, it must be stressed that participation in the study is not dependent on continuing membership of the group or vice versa. The group is expected to continue to function within its own agreed boundaries regarding membership of individuals.

Debriefing and dissemination of the study’s findings
Regular reviews will be held with existing group members (e.g. following each significant milestone in the study such as the discussion agreeing methods to be employed or the application of an agreed method for generating data). Once data collection is completed, it is proposed that a debrief discussion takes place to review the group and individuals’ involvement in the study which is likely to generate further data pertinent to the use of a participatory approach. On final completion of the study (both before and/or after submission of the written thesis, as participants prefer,) a final debrief is proposed so that the group can consider what, if anything, they wish to do with the findings themselves. Additional debrief discussions may be requested by any participant in the study. For those study participants who are no longer members of the group, the researcher proposes to liaise with them individually to agree their own preferences for debriefing.
Dissemination of the study's findings will, to some extent, be dependent on what those findings are. Agreement of all participants will be sought before any dissemination is undertaken (other than the submission of the written doctoral thesis for assessment).
Sustainable Professional Development: a participative study of a self-facilitated learning group

Semi-structured questionnaire

The responses to this questionnaire will be used as data for the above inquiry and for no other purpose unless participants are approached for their permission to do so and provide their consent in writing in advance. Please read the briefing paper for participants before completing the questionnaire and direct any questions you have about the study to h.goodall@btinternet.com. Please only complete the questionnaire if you are satisfied that your answers will be treated with the respect and confidentiality that you expect.

The boxes below will expand to accommodate your responses. Please be as honest as you are able to or as your memory allows!

Many thanks for taking the time to assist with this study.

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<td>1. What were your reasons for joining the group when it was formed in 1997?</td>
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<td>2. What was your experience of the group during your membership of it?</td>
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<td>7. What, if anything, would have encouraged you to remain a member?</td>
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<td>8. Thinking back to the time of your membership of the group, what were the major benefits or advantages of belonging to it for you personally?</td>
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<td>9. And what were the disadvantages or challenges for you personally?</td>
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<td>10. Since your membership of the group, have you joined a similar learning group? Whether you’ve answered yes or no, what were your reasons?</td>
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APPENDIX 9  IMAGE OF FLIPCHART SHEET PRODUCED DURING GROUP BRAINSTORM OF POTENTIAL ETHICAL ISSUES ASSOCIATED WITH THE STUDY.

October, 2012.
APPENDIX 10  INDIVIDUAL NARRATIVE ACCOUNTS of EXISTING GROUP MEMBERS

(Writing to the title ‘How I experience or see the Group’)
MEMBER 1

I joined the group when I was relatively new to business and coming up against a bit of a man's club. I felt the need to identify with other women who were operating in this world as many of my women friends felt that business was bad, so I needed to know some women who didn't think that way. I needed some back up and also I wanted to explore my assumptions. I had arrived in business through a circuitous route involving a mixture of new age and anti establishment thinking and to embrace business and enjoy it was a transformative step for me. The idea of sharing and being in a group was familiar to me as I had been the member of bands for many years and I led a women's acapella group, but I had improvised myself into business and here was a chance to share experiences, learn more and grow. I felt I would be an equal for even though I was making it up as I went along, I was achieving good results. I wanted to show off and share my confidence with women like myself. I felt pioneering and I wanted to meet other pioneers and talk about it.

The invitation to join came at the right time for me but it also came from the right person. I admired a lot. She was holding her own in what was essentially a man's world but in my view she was doing it better and with less drama and more poise than me. She was tougher and I wanted to be like that. She was clear, to the point and firm where I could be woolly. Being invited by to join her group gave me a lift. I also knew that would be joining and I had worked with and she was impressive. Cool and collected, vaguely scary she seemed to walk on water and yes, I wanted to be like . Here was a perfect opportunity to be with two women I knew I could learn from, and I did.

The group has sustained me in different ways throughout the years. In the first years just being in it was exciting in itself. We stormed and formed and generally inspired well being in each other and renewed perseverance. As the extraordinary became more ordinary the meetings would always refresh. Being introduced to new concepts and ideas, meeting in different places and seeing new things. Now we are older and all wiser. We have grown and changed and the fire that was originally lit is now a warm blaze that we all meet around. We have all discovered that we are all completely different and this has created a wonderful kaleidoscope of experience and empathy. We are distantly committed and loyal to each other as family without the
same blood. We have grown this way because we have consistently shared in a safe place and this is for me the biggest strength of the group now. We have depth and transience which means we can share safely. I have learnt that sharing is worth it and that life is a wondrous negotiation of thoughts and ideas that we are never fully in control of. Taking time out to be part of a group that has aspired to learn together, to commit to something other than the big ‘I’, has been a humanising and enriching experience.

MEMBER 2
My view of Alys
Not so easy to do..... What to say. Finding it very hard to get started. Alys [name sometimes used to refer to the Group] has an incredibly special place in my heart.
Over many years this group has been very important to me. It has always been important enough to ensure my attendance if at all possible. It has changed and grown over the years to a tour de force. We have all shared many ups downs and flat lines. We seem to be closer than ever. There is something inherently different in friendships with people you have known and loved for a long time. Don’t know what that constituent part is, but it’s different; deep, reliable, trustable.
I have felt quite anxious at times when I felt that the group was fragmenting or meeting less regularly. Having got back to regular meetings of twice a year, I feel like I’ve just got home and put my old comfortable slippers on. I think there is a bit of smugness in there too. Also love sharing in each other’s homes again.
A range of words summarises my feelings:
Word association: Alys = support, safety, challenge, deep friendships, honesty, love, concern, laughter, respect, stimulation, commitment, difference, passion, tears, joy, privilege, acceptance, unique, precious
Safety and challenge: Sums up much of the above. I feel I can expose my emotions, feelings, intellect, lack of education, hopes, fears, vulnerabilities etc. The honesty of feedback is what makes me feel safe and that I will be challenged (can’t get away with much!) but I will not be damaged or left broken. Supportive: my life seems to have been, and continues to be, a continuous cycle of ups and downs. I have always received support, empathy, acceptance,
understanding, strategies, challenge, need and depend on opinions and feedback. surrogate partners.

Proper friendship: Comfort, warmth, relaxation, you know me, know what makes me tick, care about me and I care about you, as individuals and as a group.

We have history and context. There is a predictability that our weekends will be good and enjoyable, though not necessarily all comfort and cosy. I know I will leave in one piece.

The members of the group have a vast range of experience but same basic ethos/philosophy. We bring something to each other which is very different from our that given by other friends, partners and families.

Partners have gone
Childen have gone
Youth has gone – is going!

More recently we seem to have been supportive by email/meeting in between Alys meetings. I love that my friends outside Alys also see it as precious. Alys sessions have changed over the years. Frustrations have been aired and changes evolved. I need intellectual stimulation. This now comes in the form of personal growth/insights, more than professional development. Keeps my self esteem in tact. But also can leave feelings of purposelessness and comparison with others. I get envious and try hard to turn this into motivation. Sometimes fail. Each person brings so much in terms of similarity and difference.

Those that have left:

Hazel: total comfort re leaving. It was ended properly. I wish I had maintained contact with her.

Sharon: I was cross with that we did not end properly. I have parked it and don’t need to go there now. We have met since and our relationship is totally fine.

Ann: I still have confused feelings. We clashed on occasions and particularly at times when I have felt vulnerable. I never felt she was totally ‘present’. I still don’t trust her 100% even now.

Integration of [NEW MEMBERS]: think it was a bit lumpy at first!!!!! For them and for the existing group. Don’t remember any doubts about wanting to achieve a sense of ‘one group wholeness’. Took a while and occasionally, if
rarely, still feels that there are bits left, but may be about other stuff rather than integration.

**Issues:** faffing, will get worse with aging!!!!

**Member 3**

My view of the group, what I want from it and what it means to me has changed over the years. In the beginning, I saw it as a forum for addressing my own professional and personal development - being self-employed and working alone for much of the time, I felt somewhat isolated and in need of contact with others doing similar work. I wanted to share ideas and experiences in a way that would help me to become better at what I was doing for a living and I wanted to learn new things. I was also fairly clear that I wanted to do this with other women and not in a mixed group. I didn’t think much about why this was the case at the time but, retrospectively, I think it was probably because I was fed up with working with and for men who seemed to think of themselves as experts in the field (of developmental training,) yet appeared to have the emotional intelligence of a plank of wood themselves, and certainly didn’t seem to practice what they were preaching.

For the first few years, I wanted every group meeting to be tightly planned and organised in the belief that this would optimise learning opportunities in the time that we had available. As the years have gone by I’ve become more relaxed about this and have probably learnt more as a result - not necessarily more in respect of things that might be directly useful to me in my work but more about things that might be useful to me in living my life and making sense of it. Perhaps it was a control thing.

I’ve appreciated the diversity of sessions, discussions and speakers and I’ve enjoyed the creativity within the group. Most of all, I’ve really come to value the relationships and friendships with other group members and the level of support, honesty and genuineness. There is nowhere else in my life where I feel that I have the same experience of learning (about whatever) and discovery in an atmosphere of such trust. That doesn’t mean that there is no challenge - this exists on a number of levels for me, some I welcome and others I find difficult. On one level, I believe that other group members will be honest with me and, whilst they might accept me as I am, they will also tell me if I’m out of line or whatever, and I truly appreciate this. I have valued the intellectual challenge of some of the sessions and am
anxious that this is not watered down any more than it may already have been. On the other hand, I still struggle with the times when we faff about, don’t start on time and don’t listen to each other as well as we might. The ‘herding cats’ difficulties that chairs sometimes have drive me round the bend, whether I’m the herder or in the herd. As far as the time with the group is concerned, this is precious and I don’t want to waste it.

I believe that the group members are committed to its continuation and to learning (in its various forms) and this has appeared stronger to me over the last few years. There were times in the past when it seemed like the group may have reached a natural conclusion, but here we still are. This, I believe, says something about the motivation of us all to continuing learning, regardless of age, relevance to work or anything else. For me, it reflects how much I value being part of such a group of remarkable women and the opportunities for learning that this membership presents.

MEMBER 4

Imagine a mix of relationships – cousins, great friends, colleagues, sisters, coaches, trainers, support and trusted advisers. These are some, not all, ingredients that go into making the Group so powerful for me.

and I were the last to join the group about 8 years ago – 2003 - and I had no idea what I was doing or what the group was really about. I trusted my friend and colleague Joyce who suggested me and I have never looked back.

The amount of knowledge, experience, coaching, advice and friendliness within the group is extremely powerful. There can also be a little friction sometimes because we are all very different women. This is made even more so because we are all used to directing and leading our own lives and also those of others including our families and work colleagues. However we overcome these differences for the working of the whole and get on extremely well.

Similaries – interested in making a difference; background in counselling, psychotherapy, NLP, coaching, training. All interested in
continued personal development – I would even call us “learning junkies”!
Differences – backgrounds and culture as well education in the past. Some smoke, some vegetarian, some are fitness mad and others are more relaxed on health and fitness but it all seems to work!
Structure – very loose, yet structured meetings with agenda, timetable, minutes and actions. Within that there is free flow of ideas, learning and exchange of newly acquired education or training.
Meetings – Twice a year; this has changed over time and I am sure will continue to do so. The consensus is that we wish and need to meet at least twice a year. We meet at difference venues and locations.
Contact between meetings – geographical – but in contact with email and phone calls.

Dynamics – the core group has been together for several years. The last person to leave caused a little bit of trauma – feeling of loss, change, betrayal and even a sense of betrayal in some.
Exercise – we always do some form of exercise albeit just a walk of 2/3 miles after lunch on Saturday.
This group is unique in my life offering friendship and support of peers. Laughter and fun is a big part of the group.
I see the group continuing for some time to come as long as the members are fluid and flexible to accommodate all the interests and needs of the whole.

MEMBER 5
In some ways I was reluctant to start this, because I didn't think I could do it justice, in other ways I couldn't stop writing because I kept remembering more important things. This morning I've been thinking single words like :- trust, fun, friendship, laughter, love, tears, courage, self-belief, sharing, being true to self, knowing more who I really am and being able to express it.
So, to start properly, The group had already been in existence for a number of years when I joined in 2003. There were two new members at this time, - I was one of them.

I've always had an avid interest in learning, couldn't wait to get to school or Suday school and loved them both. I joined in everything, story telling, choir, nativity plays, netball teams. Loved it all in spite of frequent bouts of illness absences. I also enjoyed good friendships, but the older I got, the more difficult I found it to make close friendships and work didn't help.

had told me about some of the activities that the group did in its meetings and I thought how interesting the group sounded, not alwqays easy maybe,or maybe not necessarily what each member would choose to do on their own, but challenging and with plenty of opportunities for learning on the way. I had absolutely no hesitation about taking the chance to be considered for membership and was delighted to be told I was being invited to join the group at its next meeting later in the year. I was expecting fun learning and friendship, and that’s what I got from the very first meeting, - with subsequent bonuses.

At this point in my life I was struggling to come to terms with loss, - of a much loved aunt and best friend from university plus very unpleasant menopausal symptoms, and I was feeling seriously unsteady on my foundations. couldn't have come at a better time for me, I felt understood and supported in a way that felt like family but wasn't, it was more like being co-opted into the best sort of team possible.

So that was the beginning for me and the present conclusions from looking back at how I’ve benefitted from being a member of (These are a sample reflecting the present state.)

I've learned a lot more about me and the limits I place on me (but need to test).

Meetings provide opportunity to catch up with friends to do new things together
that we can all learn from, to help each other learn and live without armour in a loving supporting environment, which can also be challenging. Being vulnerable to others can be liberating and the experience inevitably rolls over into everyday life, where confidence increases and the apparent taking of risks in relationships leads to stronger, more productive outcomes, whatever the nature of the relationship.

What do I get from Alys [the group]

Security/support -- Knowing that people are there for me if I need them and that I can just be as I am and I'm ok
Challenge encouragement laughter, good food restricted sleep, ideas, help.

One of the most powerful forces that keeps me coming back for more is what I get for me, and the learning I see others experience because this is my learning too.

MEMBER 6

- how I see and experience the group

1st meeting 2 Feb 1997, 16 years ago

I am surprisingly nervous beginning to write this. Also I am aware that as [group] weekends approach I have very ambivalent feelings - I strongly feel that I don't want to go. This is weird considering that I am very attached to the other members of the group and always have a profound, good (often great) and stimulating time and come away feeling fulfilled and appreciative. I joined because I really wanted to.... so..Am not sure what this is about.

But I found this quote "Our group is always here potentially, being enacted, brought into being....it is always inherent...the model is circular or spiral, used to explore the dynamics of the system as a whole". Maybe that's what makes me nervous.

The group has meant many things to me over the years and I am struggling to remember the early days. My memory is kaleidoscopic - anecdotal, episodic and unreliable! I have just tugged two big files from the back of the cabinet, so let's see....

Here are our beautiful early reports after sessions, full of photos, pictures and creativity. .. we don't do these any more, and we dont meet as often - we had a
bit of a hiatus when the group wobbled and we reconfigured...food for thought there..

Here are details of many of our amazingly varied activities....
dreams, reiki, creative writing, attunement, Indian head massage, art, nutrition, poetry, stories, groups as systems, laughter workshop....intellectual, physical, creative, earthy, moving, hilarious....

Another kaleidoscope of venues, sampling all our lives and homes and the nourishment (literal and figurative) that we all bring.

I remember standing on Dartmoor and doing a ritual - the native American way of solving tribal issues, with walkers going past with dogs as we stood in a circle amid the stones and heather... .....staggering three miles up the hill to ʼs after the curry and non-existent taxi in the drizzle... running up the beach naked except for her hat... at the flipchart in hotpants on the balcony in Spain... Our 'Quest' in the hills for... wiggling to Zumba... singing... Tai Chi in the garden...Blissed out with the head massage...The extraordinary experience when lay in front of us at . So much richness that I am finding it hard to focus on the question.

Am aware of how I felt when people left the group - first, then then I was happy to accept when they made a good choice for themselves, I felt we have to have the right to leave without recrimination, so I would miss them but let them go. The one that left me struggling with uncomfortable feelings was , although I know it was right for her.

Am also aware I struggled to accept and into the group to start with - not to accept them, just to find how the group (and I) would adjust to new people. Now can’t imagine it without them.

Parents have died, babies been born, relationships begun and ended, crises and illnesses have entered and exited and throughout we have truly been there for each other. Yes, there have also been times when I have been bored, irritated, dismissive or unable to connect with something, but rarely.

A group only exists as a series (manifestation?) of relationships and writing this has made me remember just how extraordinary the Alys Band [the Group] is.

What it 'means' to me is less clear.
MEMBER 7

The Alys II – Touching Our Lives?

To prepare ‘How I see being part of the Alys Band/Alys II over 16 years’, I:
- Reviewed notes from our first meeting 1st – 2nd February 1997 in Twickenham
- Reviewed the Alys Band I & II record of weekends I had produced [Feb 2003] and shared with the members of the group
- Checked literature on the meaning of personal development and learning groups.

What I want from the group:
Has remained very much the same as what I wanted at the beginning. I have rated these as the top 5 listed by our group in February 1997.

1. Personal development and (with a strong focus on) feedback from
2. A Peer group of
3. Modelling – highly effective leadership in women sharing
4. Friendship with women to develop
5. More confidence and
6. Inspiration/Motivation to have a
7. Sounding Board that will support my other activities
8. New ideas/ideas
9. To develop my/our businesses and myourselves with a particular interest for me in observing and being part of group dynamics and the influences I have and other have within the group. Develop my 6th sense in this area. Through putting into practice how I manage:
10. My Energy
11. Negotiating boundaries/contracts
12. Sharing skills in a structured and unstructured way (being flexible)
13. Freedom to ask for what I/we want
14. Co-working
15. Working relationships

Agreed Ground Rules:
Don’t make assumptions / Share responsibility / be creative in terms of what we want / Fun – not deadly / Attention to environment (e.g. no smoking when meeting) / Confidentiality (check out before using professional/client information) / Respect and mutuality / Being straight / establishing our integrity / Freedom to opt out of sessions.

My Concerns / Our concern
My initial two key concerns were about time and being understood. Wanting my actions to be trusted, and accepted as coming from a place of ‘positive intentions’ for learning outcomes; for myself and the others. However I am very aware that for many be people ‘trust needs to be earned’. My initial stance is to trust – the doubts come later. I only knew just one person in the group Helen.

My keenest that we have a shared understanding within the group could be perceived more as ‘challenging’ [the person] rather than for clarity [the desire to understand the thinking]. I believe very much that personal development is about growth which requires a certain amount of ‘challenging thinking’. This is very much important to me. However I am also aware that it also depends on the emotional state we are in as to how receptive we are to trusting the process. Do I trust I have
The Alys II – Touching Our Lives?

the awareness to pick up the emotional state others are? This is my motivation (driver) for feedback from a friendship group, with the skills and awareness to embrace this crucial area of personal growth and learning. My opportunity to fine-tune my ‘emotional intelligence’ (save searching for a better word) antennae.

My time concerns were about would I make enough time seeing I was already very steeped in my personal development through my study and network of NLP practitioners. An array of experience and people that were providing very much what the Alys group was offering. What it had not to date was being very much part of group of women.

The groups concerns were around:
- Authenticity
- Membership/trust
- Time/priorities in our individual lives
- Team player authenticity
- Keeping momentum/building
- Logistics
- Focus – to be HR/‘people’ and learning
- Linking session

Our Process/Weekend Format
I have been very happy to follow and to be flexible to the groups wishes. I also feel I have made inputs that have been of value. I have enjoyed and learnt from all we have done.

How have I done this? Through trusting the process. It has been a self-directed one in the main. And I believe that all will add something to who we are and want to be – if we are open to it.

We agreed to use:
- Workshops/sessions we bring
- Problem solving/sounding board session / clinic
- Articles/Radio/TV programmes of interest / books / poems – distribute/inform others/bring to the meetings
- Outside speakers/people
- Trips
- CV’s – share skills
- Success sharing
- Fun on the agenda
- Sorting out logistics for the next meeting before we depart

Due to people leaving the group this has prompted reviews of whether the group is providing us with what we want. I’ve been pleased to see that the core reasons for joining and continuing for me have remained. New members have integrated well; there are of course still challenges: i.e. awareness, acknowledging and appreciating to be embraced.
APPENDIX 11  FORCE FIELD ANALYSIS NOTES

Image of flipchart Results of force field analysis with associated comments from the Group (extracted from transcription during analysis) in response to ‘what sustains our engagement and participation?’

NB - Some comments were seen as relevant to both ‘for’ and ‘against’ and therefore appear twice below.
WHAT SUSTAINS OUR ENGAGEMENT AND PARTICIPATION IN THE GROUP?
Key comments from transcript of accompanying discussion, extracted during analysis.

FOR:

- **Adaptability and flexibility of arrangements**
  *We changed format and regularity of meetings – that helped me to stay.*
  *The immersion.*
  *Our willingness to test whether what we’re doing is appropriate for each person’s needs.*
  *But the kind of occasion where we’ve had a wobble – they’ve become a catalyst to us saying, what do we need to do differently?*  
  *We went out of problem thinking into solution thinking.*
  *What doesn’t kill you makes you stronger.*
  *And we’ll go through wobbles again, I’m sure – I mean it wouldn’t be normal not to have some doubts occasionally or difficulties or whatever – then it would be smug, I think.*

- **Shared tasks**
  *It’s making people bring meals!*

- **Extended time**

- **Missing the experience when it was less frequent**

- **Ground rules**
  *We worked out our ground rules before we started thinking about what we were going to do [as a group]*
  *I think the expectations from those ground rules would be a kind of behaviour that was courteous and considerate of others.*
  *The ground rules were invaluable*  
  *I think of the ground rules as us expressing a certain spirit.*
  *It’s become embedded in the way ....*  
  *Yes, if you were to ask me what were our ground rules, I don’t feel I could list them just now.*
  *It’s interesting you saying the ground rules [say] ‘don’t make assumptions’ but we changed it [to] ‘be aware of my assumptions’.*

- **Variation of agenda items**
  *There’s no holds barred on agenda items.*
I think it’s about what you believe about the best way of knowing things – where am I coming from? [I've] gone down a sort of middle route, which is saying there isn't a right or wrong way, it’s about choosing a route that suits your purpose - there’s a purposeness to it.

You can go that’s the outcome, that’s the aim, that’s the objective. That’s one level of thinking. But there’s a deeper level of purpose and meaning and will.... I have a feeling of purpose and meaning in this group and it’s a deeper thing than just willpower or a spelt out outcome. And I wouldn’t be here if it wasn’t here. I know that. I think that I lost that for a bit with this group which was when I had my wobble.

Ok, I can live with that ...it's gone beyond I can live with that to something that I value more, but I definitely went through a period of a couple of years thinking ‘I’m not sure’.

[If I just joined a professional learning group] I would expect it to stop when I stopped being a consultant or trainer or whatever .....so this group has got a lot of other stuff going on in it that keeps me engaged and thinking that there’s a future to it – for me – not just a future for the group but a future for me in it.

The group started with an emphasis on professional development ....my emphasis has been personal ....I think it’s gradually got to that. My evidence of that ...I felt earlier on I brought up the bit about feedback ....in my mind it was personal. The personal that leads to the professional.....So it was me as a person, how I come over, and I think it took some time for that ....there was a tension.

[For me] the group has been about personal, a learning group, a personal development. And I think, possibly, that's where we're all at now, because of the social bit. In other words, there isn't the hang up about, well, we're just chatting, let's get on with the topic ....it's interfering with the business.

- **Trusting the process**
  
  It’s organic.
  
  We’ve each got our own individual purpose but the purpose of the group is higher than each one of us.

- **Commitment to the journey**
  
  Sticking with it.

- **Sheepdogs’ loyalty**
Can get you here when things are tough.

- **Affection and support**
  
  A lot of really thoughtful and sensitive support – something like that is very powerful.

  There was a feeling of support that you’d [had] similar experiences - that was good.

  Companionship’s enough of a reason to meet.

  In the past I have found it difficult to say no [to the family requests etc but now .....]How am I going to feel if I miss all of you here?

- **Bolt hole and virtual safe haven**
  
  To share things with people who you’re not with all of the time feels really safe. You’ve got them off your chest, you’ve been supported and then --- got some ideas to move forward.

- **Staying the course**
  
  This is really about longevity. We’ve been going at it a long time.

  The turning point for me was X saying ‘but I thought you were all going to come to my funeral.’

  Staying the course is quite a strong driver isn’t it? But also, you don’t want to be stupid and flog a dead horse do you?

  If you choose to stay the course on just one thing in your life, it’s still valuable, I think ....to stay the course on some things.

  Which course do you stay on? When do you know? You never do. You’ve got to do your best haven’t you?

  About robustness – that we can roll with the punches, kind of thing.

- **Other comments from the transcript:**
  
  I feel very valued.

  The research has helped – and I said it’s part of research. And that to me was helpful to sell it [attendance at the weekend] to him [her manager] if you see what I mean. Rather than me selling it to myself: This is our loyalty to this group. And through the vehicle of this research ... you’re giving us the opportunity to look at ourselves and us – and the group.

  And as learning people we’re committed.

  It keeps us on our toes.

  The toxicity ... it turned into a catalyst for change to where we are now.

  The thing was though, in some groups that toxicity thing would have crashed
the whole group, but it didn’t. We’re saying we may have had the effect of some negative feelings in the group but we’ve been able to rise above it

[Can you all remember what you felt like when] you were invited to attend?

It mattered.

Excited.

I was excited.

I was really excited.

Pleased.

Enthusiastic.

That is something I want to do … but will it be all right? Will I be all right?

A bit of a blind leap of faith too – a leaping into the dark, I just went on her word.

AGAINST:

- Competing priorities
  When it was quarterly I just thought there’s too much pressure. I can’t do this, I’ve got too many other demands on my time.

  And it wasn’t about not valuing the group, it was just too much for me at that point.

  In the past I have found it difficult to say no [to the family requests etc].

- Time

- Losing sense of purpose
  I think it’s about what you believe about the best way of knowing things – where am I coming from? I've gone down a sort of middle route, which is saying there isn’t a right or wrong way, it’s about choosing a route that suits your purpose - there’s a purposeness to it.

  You can go that’s the outcome, that’s the aim, that’s the objective. That’s one level of thinking. But there’s a deeper level of purpose and meaning and will....

  I have a feeling of purpose and meaning in this group and it's a deeper thing than just willpower or a spelt out outcome. And I wouldn't be here if it wasn’t here. I know that. I think that I lost that for a bit with this group which was when I had my wobble.

  Not seeing the purpose. Not valuing the group purpose.

  Losing my sense of purpose and perhaps feeling that other people weren’t committed as well.

- Toxicity (“the effect of toxic emotions”) (can be ‘for’ or ‘against’
People leaving was a disruption and it may introduce a notion of being able to leave ....

I think it was quite disruptive.

It was very important to me that we could leave ...without it being a crime. I felt that it was very important in terms of freedom and independence ....that I can say: that’s been brilliant, thank you, goodbye, without people feeling hurt or rejected.

Maybe that’s good for us though to have a dissenter sometimes. It’s not comfortable but it does make you refocus.

‘Oh, do I want to leave?’

The toxicity ... it turned into a catalyst for change to where we are now.

The thing was though, in some groups that toxicity thing would have crashed the whole group, but it didn’t. We’re saying we may have had the effect of some negative feelings in the group but we’ve been able to rise above it.

- Others’ dissatisfaction
  It wasn’t an appropriate way to leave the group .... I think that the expectation from the ground rules would be a kind of behaviour that was courteous and considerate of others. And it clearly wasn’t ....her just stomping off .... hurt people’s feelings.

  You felt as though you’re not good enough or things aren’t tight ....it’s very, very upsetting.

- Not trusting the process
  It took me a long time to really feel at ease with the group.
APPENDIX 12 IMAGES OF ARTEFACTS AND NOTES OF ACCOMPANYING CONVERSATION
Question 4: What are the implications and outcomes for participants as a result of their long term membership?

This question was responded to through each individual presenting and talking about an artefact that, for them, represented their response. The notes that follow are of the accompanying conversation.

**SB. Self-sculpture** - standing upright with arms stretched upwards, she held a blanket in front of her, concealing her from everyone’s view. She gradually lowered this to reveal herself, facing the rest of the group but looking into the distance and keeping her face ‘serious’.

*Comments from the rest of the group about what they saw:*

**SM** - transformation, a woman being all she could be

**J** - who’s behind the blanket? Seeing more of who you are - slowly for us and for you, revealing more of who you are and revealing it.

**H.** As already stated but with serenity.

**SK.** You seem confident, strong and focused.

**P.** I saw more of a little girl than a strong woman.

**A.** I agree with J but you are really good at communicating and revealing the message. Beautiful.

**P.** I was going to say, acceptance of self.

**SB.** You've all got it. I kept my face straight on purpose - I didn't want to pull anything.

**SK.** What a clever idea.

**P. A camellia**

**P.** This is about my connection with the group - there’s a Buddhist thing - there’s no such thing as permanence. There’s beauty in the camellia and beauty in this group. I feel some sort of inevitability that the group will change, stop or whatever - but this doesn’t diminish what it is now (the flower will die). The bedrock of the group is predictable. Very feminine. But the main thing is there’s no such thing as permanence.

*Comment from A: A measure of maturity has got something to do with how we operate.*

**SM. A unicorn** - a white one with a gold horn. I’d always assumed it was a magical beast with magical powers. This group has magical powers - there’s safety, challenge and transformation is possible. I unicorn stands for purity and power. It
could be quite nasty if you provoke it too much - don’t get that here. The transformation is the magic.

It’s the beast on the royal arms of Scotland on both sides and on one of England’s royal arms.

It’s not ‘I’ll give you a spell and you don’t have to do anything. It’s more like this is what I can help you to do’.

SB. What’s the transformation side?

SM. What I get on that front lasts me for the next 6 months.

SM. I’m much clearer who I am but don’t know what I would have been like if I hadn’t been a member of the group. Given what I know now, I’d always choose to be a member of this group.

**SK. My first thought was a giant turnip ...** and of a chain, pulling things out of the ground; together we can get the turnip. But it turned to a bouquet of flowers - it’s beautiful together and singular. There’s something about the blend we make as a bouquet. No cacti though. We’re flowers that go together, nothing harsh. Gorgeous.

*Conversation followed about the turnip - its size, has it grown over the years?*

SK. It’s not so much the turnip itself as the chain. It’s earthy food, a root. Organic. With the length of time - I can say things now that I couldn’t say earlier. The seven of us - I didn’t think of past members - we make a good team. I have a sense of difficult turnips - when we need to we get together and pull it out.

SB. We know how to deal with turnips now. We’ve got better at extracting turnips and more confident that we can do it. It’s a big turnip - so what? There’s confidence and security and asking which turnips do we go for? Back to taboos - are there any?

**A. A twig** ...there’s new growth on old growth. It’s quite fragile and delicate and the old growth will die. The bark is about endurance, the endurance of the group. There have been times when we’ve had to renegotiate our ‘contract’ - we’ve survived and the group is rock solid. But nothing is forever, it’s ephemeral.

P. What are the consequences for you?

A. It’s transformative but subtle. I hadn’t quite realised what a difference it’s made to me in everyday life. It’s about a sense of self and feeling okay about that. A bedrock. It’s very different from family and friendships. Very different - there’s more going on here. There are more aspects of me here, particularly the intellectual stimulation.
SM. There's more of me here than anywhere else.
A. I know I’m going to learn from other people in the group and enjoy being with them. But there are different things going on and a tension between wanting to be here and not wanting to come. I never feel in this group that I’m showing off. It’s fine to say whatever I think and I know you’ll come back at me.
SB. Friends expect things of you and you comply. We maybe expected things from each other earlier but we’ve matured.

**J. (Elephant tea tin with a wooden carving of a small elephant inside)**

For me, what’s unavoidable is that I’ve been influenced by what’s gone before which has implications.
Originally I did say that I want you to be at my funeral. It came from us stating that we want to develop.
This is a container that had tea in it. It’s an elephant - they’re big and grand. They move slowly and remember. It’s decorated, it’s attractive. There is a cultural aspect to it and I would like more of it. Inside, the carved elephant, when elephants’ trunks are down - there’s calmness; when they’re up - it’s lucky. I was lucky to be invited into this group, it came to me, I wasn’t seeking it. The diversity is enriching therefore I’m lucky in the group.
There is also the elephant in the room - there is one so what are our elephants? But with our longevity we’ll deal with them. We bring them up, for example Annie and age. Yes, I have got friends but this group is on a different journey with me and knows me now.
A. That was very succinct. Are you aware of the elephants?
J. There are things that I’m aware of outside of the group (at work) that then crop up in the group. I bring things up and the group doesn’t feel that it’s them. For example, the funeral thing and how I feel inside when it happens that what I’ve said has been accredited to someone else.
SK. Do you feel yourself not being heard?
J. Well, does it matter if it isn't acknowledged? Why don’t you give me credit - at home and at work. It reminded me that I’m in a not standing up position. Not being heard, testing it in this group has helped but could hinder if you assume that you are picking up the signals and you’re not.
Over time we have more mutual language to make meanings clearer. At the time when I wanted feedback I was being the example so that people would understand what I meant.

A. Feedback - the word didn't communicate what you wanted at the time. At the beginning there was a lot of NLP vocabulary and for those of us not familiar with NLP it was a bit alienating.

J. When I had that session of feedback, the group telling me to stop saying NLP made me aware of that and I could act on it. Why I kept mentioning NLP was that I didn't want to claim the thinking for myself.

P. The resistance that was around was from us as a group, not individually - it was a big elephant in the room.

SK. I'll send the poem - where can I go?

**H. a square plate of different kinds of tea bag**

There are 7 different flavours on this plate, all teas that I've pilfered from work. I don't have a problem with pilfering things that will otherwise go to waste. Some are calming flavours, some spice. It's food that is sustaining. The plate is and forms a solid platform for the sustenance. They've all got a life span but no end date. As far as the long-term lifespan of the group is concerned, I have recognised that the differences between us are of value and want more of that. The difference is about the shift in emphasis. I had a problem before because I wasn't getting what I wanted from the group initially. Now recognise that if I hadn't stayed I wouldn't have got what I get now - the difference. My wrapping up the plate was about wanting to keep it safe - I want to keep the group safe too.

J. I notice that you recognise the importance of the group to you because of the opportunistic event - someone took one of the teabags. We get much learning from being open to unplanned events.
WHY DON’T GROUPS WORK?

- Cultural and lack of appreciation/awareness of difference
- Competitiveness
- Punctuality - as an indication of lack of energy
- Taking self too seriously
- Negativity
- Too many chiefs
- Personal agendas
- Egos
- The tyranny of ‘structureless-ness’
- Closed minds
- (Not ) sharing food and drink:
  - Lack of hospitality
  - Common courteousness
  - Establishing rapport
  - Social event - informal - not recognised
- People underestimating the environment
- Lack of shared goals/beliefs/values
- Dogma
- Bitching
- Boring
- Lack of respect
- Gossiping/bitching
APPENDIX 14  SAMPLE OF INDIVIDUALLY COMPLETED ONLINE QUESTIONNAIRES

Respondents 1 (past member) and 3 (current member)

INTRODUCTION TO QUESTIONNAIRE

Sustainable Professional Development: a participative study of a self-facilitated learning group

Semi-structured questionnaire

The responses to this questionnaire will be used as data for the above inquiry and for no other purpose unless participants are approached for their permission to do so and provide their consent in writing in advance.

Please read the briefing paper for participants before completing the questionnaire and direct any questions you have about the study to h.goodall@btinternet.com. Please only complete the questionnaire if you are satisfied that your answers will be treated with the respect and confidentiality that you expect.

The boxes below will expand to accommodate your responses. Please be as honest as you are able to or as your memory allows!

Many thanks for taking the time to assist with this study.
1. What were your reasons for joining the group when it was formed in 1997?

I joined the group because I knew Helen, whose idea it was to start the group. Helen and I had met doing voluntary work with a rape crisis line but we also knew of each other because we were both consultants and trainers. I knew two others members of the initial group, one from a long time ago and one socially and through work.

As I mainly worked with clients on my own I really welcomed the opportunity to be part of a peer group where we could socialise, network and learn from each other. The fact that although we didn’t all know all the other members, we had intertwining histories, was fascinating and generally made for a good level of trust and acceptance.

2. What was your experience of the group during your membership of it?

I loved many things about being part of the group. The weekends were pretty special. I don't think I missed a group weekend. (I might have missed one if I was overseas.) Given that I usually worked away all week and only saw my partner and home at weekends, I would not have spent those weekends away unless I really wanted to go.

However, there were definitely some challenges for me, (no bad thing), and in some respects what I actually gained from the group was probably a bit different to what I hoped I would gain.

I’m sure we all said at the start, what we wanted to get out of the group, but I probably wasn’t too specific, as I hadn’t done anything like that before and I’d have been sure I would get something out of it, just knowing who the members were.

What each member wanted from the group and each member experienced it would have been different depending on the way they typically interacted in group/teams and maybe on their family backgrounds. We were functioning as both a team - working together on topics and exercises, and as a family - all pitching in together very informally at someone’s house (with the hosts family not there but replaced by all of us!), cooking and eating together, sharing bathrooms and sometimes bedroom, and sharing bits of our personal lives. The other key factor would have been where we each started from, in terms of our knowledge of the other members and how we knew them.

In Belbin team terms I’m a plant, a shaper and a monitor-evaluator, the balance depending on the context. In this context I hoped to generate and play with ideas (best when I’m relaxed, amongst like-minded but challenging peers), I would have wanted to have clear objectives and to see progress (I need some structure), and I would have wanted to learn from group and individual feedback and reflection (I want to learn and grow). I can remember welcoming the idea that as all the members were strong and confident, I would not end up leading by default, which tends to happen with groups I join because if I feel things are too loose, I will tend to take the lead and draw everyone in to think through what’s going on and get things organised.

On the family side, I come from a small, rather buttoned down family that never socialised. I have lived in larger families but most of my adult life there has been just me or me and
my partner. I like to be social, particularly informally with like-minded people, but I'm not good with too many people for too long, particularly if there is lot going on at the emotional level. I will tend to retreat to my own space whereas people who come from large families are often better at negotiating social situations and rolling with the ups and downs of groups.

Inevitably, there were multiple groups in play based on different connections such as having worked together, knowing each other's current or past partners, living in having children and so on. Those with the deepest ties were naturally more comfortable with each other, could take more risks, and took greater ownership perhaps. I think I was the only member of the group who had not worked with professionally. I had worked with one of the other members but only briefly. Whereas all the other members had a long history of working together in different combinations, going back many years. Some members of the group were in touch with each other socially outside of the group.

Some member of the group who knew each other well were very comfortable with airing their personal stuff. Some people arrived with baggage and sometimes held onto it through the weekend, which inevitably affected the dynamics, discouraging openness (because people's stuff was taking up what might have been open space). I wonder whether we ever talked at the start about that. What to do if we arrived with baggage. When this kind of thing happened I felt uncomfortable. An issue for me all along was the extent to which I could become fully part of the group.

My reaction to one particularly member of the group became a very difficult issue for me. I had not met her until she joined the group and she was the member with the fewest connections to others in the group. She had a very strong affiliation to a particular methodology/model/thinking system, pretty much to the exclusion of all others. I found her arrogant, self-absorbed and manipulative. I did not trust her or feel emotionally safe with her. I felt that if I played by the rules and the spirit of the group and was genuine and open with her, things could go badly awry. Although we got along on the surface I think we both felt there was a clash of personalities.

I think there were others who had issues with this person and I wonder whether our reluctance to confront the issue 'professionally' had something to do with the facts that a) the only person she knew (or knew well) before joining the group was , b) there was a clear risk she might not be able to handle feedback, and c) she was . I believe all these facts influenced me. Had there been a facilitator I would have turned to them for advice or assistance, but without that option I decided that I did not want to deal with the issue which was mine and I had a choice to either live with it, or leave the group.

It was never going to be that all the members would engage with the group in the same way or want or get the same level or type of satisfaction or pleasure from it. And thinking about it now, perhaps we should have got that fact out there right up the front and worked on what we could do to optimise the chances of the group working for most of the group most of the time and all of the group some of the time. I think we did have some kind of agreement and ground rules, but perhaps we should have paid more attention to them. Having said that, I would very likely have been a voice saying bah, let's not get too heavy, let's just get on with it and see how it goes!

Maybe we should have spent more time learning about each other quite deliberately in preparation for being self-facilitating. And working out how to self-facilitate.

Maybe Transactional Analysis might have helped us. To make this thing work we were all
going to have to commit to being in adult to adult mode most of the time, and to making
opportunities for glorious forays into free child. My memory is that instead we spent quite
a bit of time in various permutations of parent-child and child-parent as team members
used the group to unpack (sometimes just dump) and process their personal issues, or
simply could not uncouple themselves from the rest of their lives for two days, for
practical or other reasons.

In the learning sessions, the same modes came into play making interaction and feedback
less robust that it might have been. I think the default mode was to take is for granted that
we're all adults here and we all trust each other, so it will be fine if we just hang loose and
go with the flow – without need for discipline or learning to establish habits. My memory
may be exaggerating these things, but nevertheless, I know they had a significant effect on
the dynamics of the group and on the extent to which I opened up to and was prepared to
be open with the group.

Having dual objectives (social/professional) was maybe too much to ask. Though
definitely positive in some ways, there were also ways in which the two things were in
conflict. Boundaries were unclear and subject to adjustment due to circumstances, and
ground rules for one agenda would not work for another. Not comfortable for me given
my need for a bit of order!

I found I didn't really have enough energy left after a busy week and usually a long drive,
to put my all into the ‘work’ part of the weekend, even though I wanted to. I guess I felt
like I'd done enough thinking in the week. This probably applied to others and so we
sometimes didn't go into things very deeply when that would have been necessary for us
to have gained something really significant from whatever the exercise was. I think we all
had much more to offer than we actually shared but there was an element of some of us
not feeling confident enough with the group to take risks and and unconscious collusion to
not appear competitive or too different or challenging. A facilitator would have pushed
people to stretch and deliver more and encouraged through the barriers. But part of this
was just not having enough time. We arrived Saturday lunchtime, had lunch, checked in,
had a working session, had a night out, did a Sunday morning check-
in, another working
session followed by feedback, followed by lunch, then off home.

At the end of each weekend, we always had a feedback session which I seem to remember
was structured. Having a feedback session and everyone saying where they were at was
really good except that I found I didn't want to be as authentic as I would usually want to
be because straight after the feedback session we would all be going our separate ways.
We would have a long drive ahead of us, on our own, or maybe with one or two others in
the car. So I never wanted to open anything up, or dig too deeply into what I was thinking
at that point.

3. During your membership of the group, how well did it meet your expectations
and achieve your personal goals as a learner?

I think the learning I was really looking for was something much more challenging and
serious with a deeper level of thinking involved and really focused feedback. I felt there
was quite a strong sense of ‘don’t let’s get too heavy’ and I shared that too when I realised
that what I would have liked and what could realistically be achieved in the time and given
the dynamics were two quite different things. To have gone to a deeper level we would
have needed more time and also a real shared project or a ‘wicked problem’ that we just
On the feedback, the very short timeframe did not allow sufficient time to reconnect and re-establish trust, open yourself up for feedback from others, or clear a space in your head to give carefully considered feedback to others, then have sufficient time to process the feedback and to reground, before going home. We all knew that if we pushed it, we might have to live with fallout that would spill into social time and spoil it, or we’d have to travel home with things unresolved. And without a facilitator we had no safety net.

I’m strongly attracted to the idea of ‘self-facilitation’ with its promise of empowerment, shared responsibility and shared exploration, but there were times when I felt we were at sea without chart, compass, captain or rudder.

- Would have been good to have a clearly identified self-facilitation methodology or model to follow and use as a reference point. Did we have that?
- Not having a single facilitator does make the group members take responsibility – but only up to a point.
- Maybe we should have identified what a facilitator does that a self-facilitated group needs to do for itself, and how it’s going to do it.
- One effect of not having a facilitator was that things went unsaid and undealt with as there was no certainty about being able to manage the process, no safety net.
- Generally I think the group was incredibly loyal and mutually supportive, but inevitably there were times when individual members were having difficulties with the group and sought out others individually to discuss their issues. This was a hidden element of the dynamics that could have been destructive though in this case I don’t think it was. Had this been a facilitated group, any member with an issue could have gone to the facilitator for help, or to ask for support in ‘going to the group’.

To have had a designated facilitator would have changed the experience completely and I don’t think that’s what anyone wanted. I didn’t want that. But were we actually self-facilitating? Or were we simply facilitatorless?

### 4. How would you describe yourself as a learner?

I learn incrementally. If I learn as I go, layer by layer, I learn very quickly. Formal training doesn’t work that well for me and formal study doesn’t work for me at all, except to produce a qualification.

I learn best by doing and I do my best by learning. I treat my work every day as a continuous learning process. I am curious, want to make sense of things, want to know how things work, what the logic is, how things fit together, what the process is. I’m a dot joiner, a system thinker.

I have confidence in my capacity to learn so I am always challenging myself to do something slightly outside my comfort zone – the next increment.

I also learn quickly through personal research, reading widely and using the web, but always driven by an immediate need to know how to do something or about something.
5. To what extent would you usually seek out group situations as your preferred forum for learning?

I would not deliberately seek out group situations for learning, mainly because I don’t think that approach suits my learning style. But I would not rule it out. I can see that there would be circumstances where it might work for me, if group activity was reasonably structured and focused just on learning or networking and social contact, not both – and focused on a real problem to be solved. I have recently become fired up again about action learning because I can see opportunities where it could be very useful, where I am working now.

6. What were your reasons for leaving the group and when did you leave?

I left the group because I was moving to live overseas. But I think I had been thinking about whether or not to stay in the group for a while before I left. I was still very much valuing the comradeship and nurturing from other women who I felt were mostly true friends with a common bond because of what we all did for a living, some common background and experiences, and a growing fund of shared time together. But the frustrations were beginning to get in the way of my feeling really positive about the weekends.

7. What, if anything, would have encouraged you to remain a member?

As I was moving to live overseas, the issue didn’t arise. But had I been staying, I don’t think the main disincentive for me to remain could have been addressed, that being a simple clash of personalities between myself and one member of the group. I would not have wanted to make an issue out of it with the whole group and I don’t believe there would have been any point in confronting the problem with the other person. She was just being herself and I was being me. Sometimes things just don’t work out.

8. Thinking back to the time of your membership of the group, what were the major benefits or advantages of belonging to it for you personally?

The main advantage for me was experiencing being part of a group like that, particularly because being ‘into your work’ was totally acceptable, so you took most of yourself into the group, not just the social surface level. I am no longer in contact with some of the members of the group, and only infrequently in contact with others, but apart from the one person with whom I clashed, I feel that we all still have a connection and I could pick up with them anytime. That’s a very good thing to come away with and still have.

I know my professional practice did benefit from our learning sessions but I can’t recall anything specific. However, I did learn more about myself from how I experienced the group and about how groups like that behave. That learning has certainly been beneficial.

9. And what were the disadvantages or challenges for you personally?

There were no real disadvantages, but certainly challenges. I’ve described the challenges in sections above.
10. Since your membership of the group, have you joined a similar learning group? Whether you’ve answered yes or no, what were your reasons?

No, I have not joined any similar group and have not come across any to join. I do try though to keep up social contact and networking with women with whom I have some ongoing professional connection. I think that comes from learning how great it was to get to know other women with a work and learning focus to the social contact, rather than the basis for connection being family, or kids, or partners, or hobbies.

(RESPONDENT 3)

1. What were your reasons for joining the group when it was formed in 1997?

Being self-employed can be quite lonely as far as have colleagues to learn from and exchange ideas with. I wanted some kind of forum for my own professional development. Not just a course - I did those anyway - but something more ongoing where I could develop good relationships with others and trust them to provide me with the kind of useful feedback that I might get from colleagues if I worked regularly with others. As a self-employed person, there are no corporate or organisational development routes available - you have to organise them for yourself.

2. What was your experience of the group during your membership of it?

My experience of the group has been variable over the years but predominantly positive. It has changed as we’ve got to know each other better - we are more honest with each other now and, in my view, are better able to appreciate the differences amongst us. I’ve learnt a lot from other group members and from visiting speakers/organised sessions about all sorts of things, some related to my professional development and others having nothing to do with it but still interesting. I like the closeness, mutual respect and the fun that we have.

3. During your membership of the group, how well did it meet your expectations and achieve your personal goals as a learner?

Initially, we talked about our expectations of the group and for the first few years the group met my expectations. Then there was a period of a couple of years where
I think we struggled a bit - some personality clashes perhaps, perhaps the storming stage of team development. Anyway, we mostly came out the other side though sadly lost one member in the process. I think we changed our focus after that and my expectations of the group changed. It became more about personal development (which, in my view, still relates to my professional development) and I had to really think about whether I wanted that at the time. I decided that I did!

4. How would you describe yourself as a learner?

It depends what I’m learning. I think that I’m generally and activist and learn best from experience/doing. I also learn well in groups, through conversation and discussion - or at least, that’s what I enjoy most as a learner. I know that I’m also just as able to learn through reading and researching but I don’t enjoy it as much.

5. To what extent would you usually seek out group situations as your preferred forum for learning?

Most of the time if it suits what I’m trying to learn. On occasions, quiet reflection may be more appropriate but I would mostly seek to learn with others.

6. What were your reasons for leaving the group and when did you leave?

Not relevant

7. What, if anything, would have encouraged you to remain a member?

Not relevant

8. Thinking back to the time of your membership of the group, what were the major benefits or advantages of belonging to it for you personally?

So far, the friendship, fun, what I’ve learnt about myself, many things that I’ve learnt that have been relevant in various aspects of my professional life, the safety of belonging to a group of people that I trust totally.
9. And what were the disadvantages or challenges for you personally?

There have been no disadvantages but plenty of challenges, some to do with challenging my own identity and view of myself, my lack of tolerance of others and having to learn to manage that, frustrations over timekeeping and dithering - but that says as much about me as the group.

10. Since your membership of the group, have you joined a similar learning group? Whether you've answered yes or no, what were your reasons?

Yes, I've joined 2 triads, both with the purpose of supporting each other through particular professional learning experiences that we have been engaged with and I've found both very useful. One came to a natural conclusion and the other is still ongoing.
APPENDIX 15  EXAMPLE OF CODED NARRATIVE ACCOUNTS

Coding Sheet (image)

Question 1: What encourages, influences, and motivates people to engage with and participate in professional learning groups?

Question 2: What sustains this engagement and participation?

Question 3: What is the efficacy of self-directed or self-facilitated groups in achieving ongoing, transformative, professional learning?

Question 4: What are the implications and outcomes for participants as a result of their long-term group membership?

Something else significant? Q5 - Why some groups are successful and some not?
I joined the group when I was relatively new to business and coming up against a bit of a man's club. I felt the need to identify with other women who were operating in this world as many of my women friends felt that business was bad, so I needed to know some women who didn't think that way. I needed some back up and also I wanted to explore my assumptions. I had arrived in business through a circuitous route involving a mixture of new age and anti establishment thinking and to embrace business and enjoy it was a transformative step for me. The idea of **sharing and being in a group** was familiar to me as I had been the member of bands for many years and I led a women's acapella group, but I had improvised myself into business and here was a chance to **share experiences, learn more and grow**. I felt I would be an equal for even though I was making it up as I went along, I was achieving good results. I wanted to show off and share my confidence with women like myself. I felt pioneering and I wanted to meet other pioneers and talk about it.

The invitation to join came at the right time for me but it also came from the right person. I admired Helen a lot. She was holding her own in what was essentially a **man's world**, but in my view she was doing it better and with less drama and more poise than me. She was tougher and I wanted to be like that. She was clear, to the point and firm where I could be woolly. Being invited by Helen to join her group gave me a lift. I also knew that Hazel would be joining and I had worked with Hazel and she was impressive. Cool and collected, vaguely scary she seemed to walk on water and yes, I wanted to be like Hazel. Here was a perfect opportunity to be with **two women** I knew I could learn from, and I did.

The group has **sustained me** in different ways throughout the years. In the first years just being in it was exciting in itself. We stormed and formed and generally inspired well being in each other and renewed perseverance. As the extraordinary became more ordinary the meetings would always refresh. Being introduced to new concepts and ideas, meeting in different places and seeing new things.

Now we are older and all wiser. We have grown and changed and the fire that was originally lit is now a warm blaze that we all meet around. We have all discovered that we are all completely different and this has created a wonderful **kaleidoscope of experience and empathy**. We are distantly committed and loyal to each other as family without the same blood. We have grown this way because we have consistently shared in a safe place and this...
is for me the biggest strength of the group now. We have depth and transience which means we can share safely.

I have learnt that sharing is worth it and that life is a wondrous negotiation of thoughts and ideas that we are never fully in control of. Taking time out to be part of a group that has aspired to learn together, to commit to something other than the big 'I', has been a humanising and enriching experience.
My view of Alys

Not so easy to do..... What to say. Finding it very hard to get started. Alys has an credibly special place in my heart.

Over many years this group has been very important to me. It has always been important enough to ensure my attendance if at all possible. It has changed and grown over the years to a tour de force. We have all shared many ups downs and flat lines. We seem to be closer than ever. There is something inherently different in friendships with people you have known and loved for a long time. Don't know what that constituent part is, but it's different; deep, reliable, trustable. I have felt quite anxious at times when I felt that the group was fragmenting or meeting less regularly. Having got back to regular meetings of twice a year, I feel like I've just got home and put my old comfortable slippers on. I think there is a bit of smugness in there too. Also love sharing in each other's homes again.

A range of words summarises my feelings:
Word association: Alys = support, safety, challenge, deep friendships, honesty, love, concern, laughter, respect, stimulation, commitment, difference, passion, tears, joy, privilege, acceptance, unique, precious

Safety and challenge - Sums up much of the above. I feel I can expose my emotions, feelings, intellect, lack of education, hopes, fears, vulnerabilities etc. The honesty of feedback is what makes me feel safe and that I will be challenged (can't get away with much!) but I will not be damaged or left broken. Supportive: my life seems to have been, and continues to be, a continuous cycle of ups and downs. I have always received support, empathy, acceptance, understanding, strategies, challenge, need and depend on opinions and feedback. Surrogate partners. Proper friendship: Comfort, warmth, relaxation, you know me, know what makes me tick, care about me and I care about you, as individuals and as a group. We have history and context. There is a predictability that our weekends will be good and enjoyable, though not necessarily all comfort and cozy. I know I will leave in one piece. The members of the group have a vast range of experience but same basic ethos/philosophy. We bring something to each other which is very different from our that given by other friends, partners and families. Partners have gone Childen have gone Youth has gone – is going!

More recently we seem to have been supportive by email/meeting in between Alys meetings. I love that my friends outside Alys also see it as precious.

Alys sessions have changed over the years. Frustrations have been aired and changes evolved. I need intellectual stimulation. This now comes in the form of personal growth/insights, more than professional development. Keeps my self esteem in tact. But also can leave feelings of purposelessness and comparison.
APPENDIX 16 EXAMPLES OF EXTRACTS FROM INDIVIDUALLY CODED TRANSCRIPT
Extract from transcript of group discussion following mind mapping activity in response to Question1 (page 1)

Question 1

Recording One: WS_20012

You were just saying, Sue?

Yes would it be a good idea if we had a spokesperson for each group to feed back the information that we've just been cogitating on?

OK.

Good idea.

Talking stick so we don't all talk over each other?

Yeah.

That would be good.

Can we have your lovely green glasses case [something that I can't make out]

Should I..? [something that I can't make out]

(Grunt of agreement)

OK. Our group felt that it was an opportunity for lifetime learners. It satisfied the fear of being alone, or rather – cancelled that out. But a fear of being alone could lead you to want to be in a group. To have a sense of belonging, social interaction, and also the need to be seen and reflected upon. It's an opportunity to share thoughts and experiences, and we all agreed we found an intellectual and emotional mutuality, which gave us support and challenge. We all felt a thirst for experience and knowledge and felt this was a robust and honest arena. The fact that we’re all women, and women in action, also gave that sense of equality and mutuality. It's great fun and good contact time, and a mix of head, heart and body. The fact that it was a closed group meant that it had stability. It gives stimulation and a reconfirmation of self-worth. It exercised and rebuilt self-esteem for people, and people felt accepted and also accepted others. A fantastic vehicle for will and purpose.

You never once mentioned affection.

(Laughs.)

No.

True.
Nor did we.

I put the word friendship on my list, where I put mutuality, because I think friendship’s grown, but I don’t think it’s what I expected in the beginning.

Can I ask what you meant by mutuality?

Yes. Quite simply for me that I didn’t feel that anyone here could make me feel stupid, and that there was nothing I could say that other people wouldn’t understand, even if I had to clarify it. That there was a level of intellectual equality, from my sense, anyway, which makes it – which was very liberating, you know, because sometimes in groups you feel like you need to shut up because you’re over… overwhelming some people, or you feel overwhelmed by somebody – and I never feel like that here.

Mmm.

Can I just add to the first bit – we had quite a few minutes’ discussion about what a professional group was - what its purpose was for us now. Started off by me saying I’m not a professional any more – which was rejected by (lost in laughter). But that’s how we came to the expression lifetime learners rather than professionals.

That was a really important discussion for us in our little half group so I just thought I’d flag that up.

(Noises of agreement.)

Sue, do you want to say something about that coz that was your…?

No, because I’ve never – I never joined a group as a professional woman. Yeah I was, but I didn’t see myself having a long-term profession.

What, because of where you were in respect of your career and…

Yes, that’s right, exactly.

Well, and we talked about the fact that we’re all edging towards being retired, or doing things in a very different form from when we were full on professional. Do we still think of ourselves as professional? And I think my feeling is yes, we still are – otherwise we wouldn’t actually be doing this – this – a mind set.

The other thing that I wanted to add in was… we bounce backwards and forwards between thinking of the question as ‘engaging and participating in professional learning groups’ [emphasis on the plural]. So I was also trying to think of other groups like the Childline stuff that I’m part of and – not necessarily drawing comparisons, but trying to see differences as well as comparisons with any other group that I might be in. But most of our time was thought around this group.
Question 4

What are the implications and outcomes for participants as a result of their long term membership?

This question was responded to through individual presenting and talking about an artefact that, for them, represented their response.

SB. Self-sculpture - standing upright with arms stretched upwards, she held a blanket in front of her, concealing her from everyone’s view. She gradually lowered this to reveal herself, facing the rest of the group but looking into the distance and keeping her face serious.

Comments from the rest of the group about what they saw:

SM - transformation, a woman being all she could be.

J - who’s behind the blanket? Seeing more of who you are - slowly for us and for you, revealing more of who you are and revealing it.

H. As already stated but with serenity.

SK. You seem confident, strong and focused.

P. I saw more of a little girl than a strong woman.

A. I agree with J but you are really good at communicating and revealing the message. Beautiful.

P. I was going to say, acceptance of self.

SB. You’ve all got it. I kept my face straight on purpose - I didn’t want to pull anything.

SK. What a clever idea.

P. A camellia

P - This is about my connection with the group - there’s a Buddhist thing - there’s no such thing as permanence. There’s beauty in the camellia and beauty in this group. I feel some sort of inevitability that the group will change, stop or whatever - but this doesn’t diminish what it is now (the flower will die). The bedrock of the group is predictable. Very feminine.

But the main thing is there’s no such thing as permanence.

Comment from A: A measure of maturity has got something to do with how we operate.

SM. A unicorn - a white one with a gold horn. I’d always assumed it was a magical beast with magical powers. This group has magical powers - there’s safety, challenge and transformation is possible. I unicorn stands for purity and power. It could be quite nasty if you provoke it too much - don’t get that here. The transformation is the magic.
APPENDIX 17 EXAMPLE OF JOINTLY CODED TRANSCRIPT

EXTRACT

Transcript of Women's Group for Helen Goodall

(Discussion following individuals reading through their writing about how they see the group)

OK, can I pick up on the point that Sue was just making. I don't feel that what I wrote is representative of what I feel about this group – at all – and I almost feel like I want to actually now write it because I'm in touch with – more with the flesh than the bones of what I've written. I'm quite happy for you to have it and do what you like with it, but I don't feel it's truly representative. And it interests me – you say you didn't feel it's (interruption) for me it feels very heady and organised and structured – but anyway that's –

That's by the by in this respect. But it is important to me. I guess one of my issues always is and always will be: "I need to be understood" and I don't feel that I've represented my feelings about the group in (interruption). No, in how important the group is to me.

Because it is **phenomenally important.** And I guess really, what I would almost say – put mine in as it is and then put in the bottom "and everything else that everyone else said", because you know the bits, some of the bits that each of you have said, completely and utterly represent what I feel about the group. So I can either rewrite it or I can just say: "see below". Do you know what I mean? Am I making sense?

Ditto me. I I...

You know, there are a few words that I picked out. Um. Who was it said **"without armour"?** That just absolutely was it.

Sue.

(Inaudible).

**Always becoming** – I think that was you Annie. I relate totally to that – and I never want to get there.

Well we won't. There's no chance!

No, there's no chance. And how our needs have changed. And that partly makes me feel incredibly sad – because it is life moving on. It is life moving on through all the various aspects and changes within our lives.

Mm.

I think one of the moments in the past – that – when the group was feeling like it might be done, was Sheila saying about us growing old together. And that's now what's happening.
Ok.

And...

For better or for worse.

Yeah, well, consequently – I don’t feel there is an end.

Unless, I think somebody said, unless we all become so (inaudible) we can’t get round it – we can’t get about any more. In which case you’re going to have to come to me.

Laughter.

But what, what, I, I, mm. What I was interested in, my feelings as I was listening was: “oh, I haven’t written anything about that”, or that little – that little bit of competitiveness or – and I think it is quite female as well, this thing of: “Oh, I don’t think I’ve quite done it right.” You know I think that’s us stepping back from ourselves. Again. We only had 500 words. So when I heard much more analytical and historical – that’s so useful, now, to have heard everybody. It feels like it’s – there’s a lot in the pot, isn’t there? And everybody’s individual way of putting those 500 words is what’s made it live – for me – it was so useful to hear what you said at the beginning and I’m glad you started it.

But in a way I think we’ve all done a bit of similar things – but in our own way.
So for you – ‘coz I thought of – shall I bring mine? But in one way I feel trusting to the group, although I didn’t bring it...

Yes.

...you did...

Mm.

...bring a visual thing – as well as actually – yeah you took out wordy bits, but, it’s, it’s – the pictures are saying a lot more.

So...

It’s the collective.

It is.

A collective what?

Yes it’s like the Americans do the screenwriting of their sit coms and things – um – as a group – and, and they’re all adding – someone adds a bit of fun, you know, so you get the whole – the whole is absolutely fantastic – so the
whole of hearing everybody – I think it was very important not for . . . to have gone in and that was it.

I think to have shown everybody – has made a fantastic meal, for me, and the, the recipe. For me it's food for thought – literally – and the visuals very important for me having not been there at the beginning.

Yes, that is important.

I'd like to know what some other people think?

Actually -

I – well, for me, I felt I learnt quite early in the group – er – linked to what you were saying, which, whether it's competitive, or the bit about "Oh, I didn't do that, though I could of". But I feel I learnt in the group quite early, words – words would come out of your mouth, and I would think, "yeah, she said it for me."

Interruption.

No, she said it for me. So for me, part of being in this group actually, is more relaxing than outside, because of feeling – (sigh) I am part of something bigger than me, but I am part of it, so – you could say the one thing that I know that I run in my life is: 'have people noticed what I've done?'

Yes.

Have they appreciated it?" Do – do – do – so that. Yeah. So that's the only thing. Otherwise… Yeah. The group's a wonderful food. For thought, but also of a wider expression of me – and perhaps even expressing it better, because of the creativity you bring and the challenge, and – you know we all – yeah – it's just – sorry I'll shut up – there's no point saying anything more really. I hope I've said it...

(Mixed voices.)

I suppose I felt it was important when I was doing this to own up to some of my – the things I don't like about myself, as well as – in a group – as well as the things that I enjoy. So talking about a bit of competitiveness is part of that – is acknowledging that, you know – that is there sometimes.

Yes. Exactly.

A bit of (inaudible) envy.

Yes.

Exactly.
Exactly.

It's human. It's being human.

Yes. But, I didn't. I suppose I didn't want the whole thing to be a eulogy, you know, that, that everything's fantastic, and that's why I talked about the ambivalence and feelings when I think about coming. There's an -- there's an anxiety there and I -- it may be to do with school; it may be to do with family, it's just -- it's part of -- part of my personality I suppose, that means I'm a bit anxious about exposing myself in, in a group and maybe feeling inferior -- or whatever -- whatever it is. It's just when I sat down to write that, that was my first feeling, it was like: "oh, you know, I'm actually nervous about writing this."

Yeah.

But isn't it interesting that, I certainly felt that and other people have touched on it, and -- and yet this is a group that we all say is the safest haven for us, but we still have that -- that anxiety about performance, a bit "la di da" -- you know, mine is about -- am I expressing myself properly, do people understand what I mean?

Well yes --

Can I just pick up on that...

Sorry.

...that for me -- safety isn't something that I necessarily feel I want to have in... believe it or not. When I say safe... I know safe -- safe or security some things that -- (sigh) yeah, for me perhaps it might be a security that can -- challenge can happen...

Yeah.

And we'll will be all right at the end of it.

But that's what I -- I think that's another thing about -- you know -- perhaps that some people want something to be safe, and what does that mean? Whereas I'm saying that for me, (sigh) yeah, it's not that I want it to be safe, it's, it's (sigh).

There isn't a word, I don't think, for what you're saying.

I mean I'm aware that when I'm with clients that they need safety and they need a container -- but they also need to feel some very difficult things...

Yeah.

...and I might actually make them feel that. So safe -- the safety is a very big vessel. Isn't it.
Mm.

(Mixed voices.) Yes. And that –
– it’s like actually, they could fall out the hole in it.

And that – I suppose that’s the thing…

**There’s an element of risk.**

I think – yes – and I think that’s the thing for me that might be a risk here sometimes, it’s – if some people want to feel safe, and then there’s the challenge, because about understanding better where you might be coming from, or where I might be. Then that’s the bit about group dynamics. Are some people willing to hold enough without feeling they need to protect and defend this poor person who they feel is feeling unsafe. And that’s – that’s…

Yes.

That’s where the energy’s… (inaudible)

Yes.

For me, the safety is the big vessel here – and like talking yesterday, all of us could talk quite safely about our feelings. But also, for me, there’s a spikiness that, um, I would like to resolve, because… we do need a bit of a negative-positive charge, don’t we, as in…

Of course…

... electricity to move, but there’s, um, quite a lot comes through to me, as coming in later, about control, structure, pfaffing… not staying to the point and things like that, that obviously irritate some people more than others. And I think that might be something that it’d be quite good to look at, because it’s been running through… and one – one time – I think we were at Sue’s – I mean you got in, not in exactly a strop, but you were – you were…

Laughter.

I might have been.

Stronger laughter.

Yeah, yeah, you were kind of, you know. Um… ‘Oh I don’t – du – this, this pfaffing going on, and thing.’ It’s something that’s really running through – and it doesn’t seem to be getting resolved.

OK.

Transcription: Page 5 of 30
Is it worse now than it was? Is there anything we can do about it? Because it
would be nice to… to iron it out.

(overlaps with previous speaker) … having this conversation now?

Might as well.

Yeah.

And so – there’s something about (pfaff structure?)

(overlapping) … off the top of my head thought, without being analytical about
it is, yes it is getting worse, maybe I’m getting shorter… fuse…

… about it. I – I think – I know – that my driver is, this is such a precious time,
that I want to maximise the whole of it. Um. And what I perceive as pfaffing is
very, very low value, white humming noise at the bottom of the pyramid?

And it may not be that for the…

It doesn’t…

(General noises of agreement.)

No, that’s exactly why I’m saying it. Exactly, exactly why I’m saying it. But for
me, it’s not like quiet time or, um. I know with – we can’t be doing like “err”
(‘full on’ noise) from Friday to Sunday – and we do need down time, we do
need chat time and quiet time, but for me that’s a different – a different
something than pfaffing. Pfaffing is just, my definition, wasting time.

And, I, I – if I can say, when, when we’ve got an agenda, and time keeping –
and this is me and it won’t be the same for everybody, but I like to keep to
time –

Yeah.

And if I’m not keeping to time I like to negotiate a change…

If we have structure, er…

Yeah.

An agenda. So that’s a kind of, that’s a discipline thing, and I know for some
people that’s not important –

 Interruption.

But it would account for my irritation, if it’s…

General sounds of agreement.

Transcription: Page 6 of 30
APPENDIX 18  IMAGE OF MIND MAP/NOTES AND ANALYSIS OF TRANSCRIPT IN RESPONSE TO QUESTION 1
Ex 1  Sheila, Patti, Sue M, Anne

Opportunity for
Life-time learners (professionals)

Fear of being alone
Belonging/social int
Need to be seen
Sharing thoughts & experiences
Reflected upon
Intellectual & mutual
emotional & support
be challenged and stretched
Thirst for experience & knowledge
Robust & honest
All women feminism in action (equality, mutuality)

Fun and good contact time
mix of head, heart & body
Closed group
Stimulation
re-confirmation of self worth
exercises and rebuilds self-esteem
Feeling accepted and acceptance of others (in group)
Vehicle for will & purpose
Analysis of transcript relating to group discussion following exercise to address Question 1

(4 group members analysed the transcript individually, notes below bring together the points highlighted by each of the 4, with examples to support.)

Question: What encourages, influences and motivates people to engage with and participate in a professional learning group?

Learning related comments in transcript:

- A thirst for experience and knowledge
- Personal growth
- Always room for more learning
- Challenge to step to the next level
- Let’s get better at what I do
- Sticking with what you know ...doesn’t help you to grow
- Exploring concepts
- Lifetime learning
- Knowledge and learning
- Stimulation
- To smash up our neuropathways ... and look in other directions
- To challenge ourselves
- Newness of things coming in so that when I’m going out, away from this group, that I don’t just always do what’s comfortable for me
- Ways of using my intellect
- Making meaning
- The content – if this was a maths group there’s no way I would be here
- A holistic approach – not just what we do in the session – it’s at the breakfast table, it’s a walk, it’s, well, everything
- Variety
- We’re learning junkies
- From the practical to the professional – the variety
- If you stick with what you know ...that doesn’t help you to grow and it certainly doesn’t help the work [that I do]

Belonging related comments:

- To have a sense of belonging, social interaction
- There was a connectedness
- We’re a bit smug sometimes
- An anxiety about the gap getting bigger
- Fear of being alone
- Intellectual equality
- Fun and good contact time
- Connected

Sharing related comments:

- Great fun and good contact time
- Diversity and common ground – for sharing
- Sharing thoughts and experience
Identity related comments:

- Re-confirmation of self-worth
- Intellectual equality
- Challenge self and the status quo
- What stands out for me in respect of this conversation about professionalism is value – being valued and valuing what you do
- Re-confirmation or self-worth
- All women
- Exercise and rebuild self-esteem
- Identity capabilities and behaviours
- Connected
- Life time learners rather than professionals
- We’re very curious people
- We’re weird
- You don’t know your levels of complacency because you’re the group and there’s just you. And then if somebody leaves or comes in – it’s just incredible what happens to the music..... I’m just saying that there must be a danger in any society or closed group that complacency is there.
- I don’t feel like I’m a professional anymore
- Will I be able to keep up?
- Feeling accepted and accepting others
- A closed group
- We’re learning junkies
- Sense of meaning we feel – confidence in our own voice
- There’s all these women n this group doing all these amazing things, you know, and I’m cutting grass and walking dogs and .... doing all the kinds of things that retired people do and ... that sticks in my gullet
- Our ageing is what will dent the complacency because we are all, at some stage, moving into a phase of life where full-on professionalism isn’t what we’re doing anymore
- We’re all going to have that, you know, how long can I go on working? Am I being de-selected because I’m that old? The answer to that is yes. Quite often you’re seen as ‘less than’. Not suitable, not appropriate, whatever
- You carry all that experience, all that knowledge, you are still a professional person. You still have that with you
- [Professionalism] is a way of behaving that’s not going to stop just because you’ve stopped going to work
- The job and the status that job is, whether you fit anymore ....do I take that on ... this external belief and therefore stop making the effort
- I’ve used the word profession related to teaching – to realize that it’s not classed as a profession
- There’s a difference between our identity our capabilities and our behaviours and our qualifications ..... I wonder whether a retired doctor thinks of himself as a professional
- Part of me feels redundant
- Being valued and valuing what you do

Group membership related comments:

- Who (is in the group) is important
- All women in our own right
• Mutuality
• Intellectual equality
• Range of experience in the group but I feel comfortable with that
• We’re all very different – if you get with a lot of other like-minded people think that’s the road to hell really – bland – mediocrity – you’re just going to back up and reinforce each other’s thoughts
• Good to be with people who think differently to you
• Everyone here is different enough for it to be exciting
• Variety of shared experience
• Intellectual and emotional mutuality
• Diversity and common ground
• Closed group – stability
• You don’t know your levels of complacency because you’re the group and there’s just you. And then if somebody leaves or comes in – it’s just incredible what happens to the music….. I’m just saying that there must be a danger in any society or closed group that complacency is there.
• Are the differences in the group becoming bigger and will I be able to keep up?
• Feeling accepted and accepting others
• Looking for people who aren’t like me
• Being valued and valuing what you do

Respect/Trust/Safety/security
• Felt safe
• Support
• Safety and trust
• Tolerance
• Open-mindedness
• Quite a lot of difference between us
• Closed group – stability
• Confidentiality
• The values – we respect one another
• I think there’s safety here

Logistical comments:
• Structure
• Process/procedure – a good idea if we had a spokesperson for each group to feedback
• Having a whole weekend – if we were only meeting for a day I think it would be very different
• Regular intervals

Concerns/anxiety related comments:
• I think my anxiety is about I may be challenged
• Are the differences in the group becoming bigger
• Having a balance between being safe in your environment but you don’t want it to tip over into complacency
• Will I be able to keep up?
It is a real anxiety for me ... is it actually going to reflect – this is extreme, I hope - but is it actually going to reflect back to me how useless and empty my life is because I’m not a professional?
APPENDIX 19  IMAGES OF FLIPCHART SHEETS PRODUCED IN RESPONSE TO QUESTION 5, AND TRANSCRIBED NOTES

Part 1 - ‘What makes this Group work?’ (3 flipchart pages)
12

- Led me to feeling I had to contribute/show my worth/credibility

- Because I knew that you all, I knew it

- Is about me not you

- Fundamentally key group-place I can

- Air my anxieties that is different to anyone else.

- Place where we became aware, question

- Things we haven’t seen before

- Best aspect of a therapy group without

- A therapist—don’t do it all the time

- But can do it.

- Sensitive to each other’s feelings but something different is happening to

- Us (aging) how is that going to affect us? Sure fear around declining difficult to

- Be with — might not be so much fun.

- Change-flexibility — where this going to be in the future + how will it be

- Dealt with. Group may give an opportunity to be different than with our families.

- How many groups want to survive—hit each other’s funeral?

- You’ll be it in regards people who have become as a ‘professional’

---

- Need to keep bringing things in that continue to stimulate

- Hear each other (e.g. platitudes) + make the journey with each other

- Did we know what we were

- Getting ourselves into?

- Don’t finish when confronted with difficulties

- This group was a huge healing after bad experience.
**Question 5 - transcribed flipchart sheets**

(If successful learning groups are defined as those in which participants continue to achieve their learning goals,) **why are some groups successful and others not, and what enables ‘success’ to be sustained?**

**Responses to this question relate to perceptions of this group.**

- Being invited to join
  - to be seen as someone with something to contribute
  - makes us feel special/chosen/privileged/desired/wanted
  - how inviter frames invitation - ingredients
  - start off not wanting to let anyone down
  - names in hat - didn’t feel like passing/failing
  - exclusivity

- Regular meetings

- Seeds of success in very beginning
  - trusted judgement and enterprise of initiator
  - flexibility
  - thoughtfulness
  - psychological awareness of how people function in groups
  - backgrounds related
  - knowing membership of group (about if not personally known)

- Joining with someone else
  - deliberate strategy

- Having structure, variety of topics
  - both continued

- How leavers are dealt with
  - frankness about how we felt
  - healthy way
  - voice hurt/disappointments

- Linked to trust
  - determined to let go and go with whoever was in the group
  - not feeling I had to perform
  - allowing - relaxing (voicing anxieties)

- Being more myself in the group and don’t have to perform

- Early times

(page 2)
- lack of self-confidence did lead me to feeling I had to contribute/show my worth/ credibility - to self
- when faded - allowed me to take risks
- coming back to the beginning (not professional/nothing to offer - find self making comparisons with others - more successful life than me?)
- “what am I doing here?”

- Because I know and trust you all, I know this is about me not you
- Fundamental to this group - place I can air my anxieties that is different to anyone else
- Place where we become aware/question things we haven’t seen before
  - best aspect of a therapy group without a therapist
  - don’t do it all the time but can do it
- Sensitive to each other’s feelings but something different is happening to us (ageing)
  - how’s that going to affect us? Some fear around becoming difficult to be with
  - might not be so much fun
- Change/flexibility
  - where’s this going to be in the future and how will it be dealt with?
  - Group may give an opportunity to be different than with our families
- How many groups want to survive until each others’ funeral?
  - you’ll be it as regards people who have known me as a ‘professional’

(page 3)

- Need to keep bringing things in that continue to stimulate
- Hear each other (e.g. no platitudes) and make the journey with each other
- Did we know what we were getting ourselves into?
- Don’t flinch when confronted with difficulties
- This group was a huge healing after bad experience
APPENDIX 20 ANALYSIS OF NARRATIVE ACCOUNTS

Current group members’ writing – “How I see and experience the groups”

(4 members of the group used an agreed colour coding process to align responses with the 5 specific questions that the study aims to address. These are collated below with those highlighted by at least 3 of the 4 of those analysing being included.)

Question 1: What encourages, influences and motivates people to engage with and participate in professional learning groups?

- Identifying with other women
- I needed some back up
- I was coming up against a man’s club
- To share experiences, learn more and grow
- Women I could learn from
- Safety
- Experience
- Learn new things \ I wanted to do this with other women
- Fed up with working with and for men
- Useful to me in living my life
- Trusted my friend and colleague (who introduced me)
- Similarities
- Group unique in my life
- I joined because I wanted to
- For personal development
- A peer group, modeling highly effective leadership in women
- Friendship
- Inspiration
- More confidence
- A sounding board that will support my other activities
- New ideas
- To develop my/our businesses and ourselves
- An avid interest in learning
- How interesting the group sounded
- Challenging but with plenty of opportunities for learning
- Trust, fun, friendship, laughter. Love, tears, courage, self-belief, sharing, being true to self, knowing more who I really am and being safe to express it

Question 2: What sustains this engagement and participation?

- The group has sustained me in different ways throughout the years. As the extraordinary became more ordinary the meeting would always refresh.
- Being introduced to new concepts and ideas
- We can share safely
- There is something inherently different in friendships with people you have known and loved for a long time
- I’ve become more relaxed [about what the group does]
- Useful to me in living my life and making sense of it
Creativity within the group
There is nowhere else in my life where I have the same experience
The group members are committed to its continuation
The mix of relationships
Similarities – interested in making a difference, our background. All interested in continued personal development
Differences – background, culture, education, smokers/not, vegetarians/not, fitness mad/not
Structure – loose yet structured meetings with an agenda
Free flow of ideas, learning, exchange of newly acquired education or training
This group is unique in my life
I am attached to the other members of the group
Our amazing varied activities
Personal development
A peer group, modelling highly effective leadership in women sharing
Friendship with women to develop
More confidence and
Inspiration/motivation to have
Sounding board that will support my other activities
New ideas
Challenging thinking
I felt supported and understood

Question 3: What is the efficacy of self-directed and self-facilitated groups in achieving on-going, transformative, professional learning?
Nothing that refers to this question was identified by 3 or more of those coding.

Question 4: What are the implications and outcomes for participants as a result of their long term group membership?

- We have grown and changed
- We have grown this way because we have consistently shared in a safe place is, for me, the biggest strength of the group now
- A vast range of experience
- Safety and challenge
- There is a predictability that our weekends will be good
- I will not be damaged or left broken
- There is nowhere else in my life where I feel that I have the same experience of learning (about whatever) and discovery in an atmosphere of such trust
- This group is unique in my life offering friendship and support of peers
- Laughter and fun is a big part of the group
- Shared memories
- Knowing that people are there for me if I need them and that I can just be as I am and I’m ok
- Being vulnerable to others can be liberating and the experience inevitably rolls over into everyday lie where confidence increases
Question 5: If successful learning groups are defined as those in which participants continue to achieve their learning goals, why are some groups successful and others not and what enables 'success' to be sustained?

Nothing that refers to this question was identified by 3 or more of those coding. The group’s narratives focused very much on their own experience of group membership and possibly the responses listed in relation to question 2 are relevant here.

Comments of analysts after completing colour coding:

- Many of the responses that were relevant for question 1, if expectations were met and included in group protocol, also respond to question 2
- Some responses relating to question 5 may be in the positive so assuming that the opposite would be ‘negative’
- Shared memories/experiences – very significant (see A’s writing)
- Surprised at the frequency of emotional attachments expressed – for example ‘place in my heart’
- Longevity and shared memories – an association? A history created between us – a ribbon, a chain both mentioned
- Picked up on ‘I love that my friends outside also see it as precious’
- Importance of openness/reviewing emerges a lot – airing frustrations and making changes in response
- Transcription 1 is an analysis of the written pieces in itself
- Importance of reflection highlighted

Process of analysis

- Finding it difficult sometimes to separate out the questions
- The way we’ve framed our responses to the original question (for writing the narrative) doesn’t help with this
- Found harder to find evidence relating to question 3
- Mostly finding responses relating to questions 1 and 2
- Finding it intriguing – as a topic and how and why we’ve survived and created what we
APPENDIX 21 ANALYSIS SUMMARY OF FOLLOW UP DISCUSSION

(FOLLOWING SHARING OF INDIVIDUAL NARRATIVE ACCOUNTS)

Analysis of transcript of discussion following individual group members reading their writing about how they see/experience the group (which took place in March, 2013).

Joint analysis – 4 group members, using colour coding to indicate associations between research questions and responses. The remarks listed below represent what was extracted from the full transcript. ‘AC’ represents additional comments added during analysis.

**Question 1**

- When we first started that’s what we were all wanting, professional development
- We’re an all female group ….several people mentioned sisterhood
- It was just implicit that it was women and that was it, that was good
- It being a woman’s group wasn’t that we were going to be just going on about men and how awful they were – or wonderful – it was about us. It was my first experience of being in a woman’s group... it was about focusing on ourselves
- I wouldn’t want to be part of something that does men bashing
- [It was]important for us as women to develop what we want, and to be able to feel safe and be able to expressly talk about things that clearly have no relevance to them
- [I think that we're all women is absolutely fundamental to this group] and to the glue that’s kept us together, because of a lot of not just common experience but common ways of experiencing
- Professional development
- Personal learning ...learning came up so much ----[should] we just drop all the adjectives and just call it learning?
- The dynamics in a mixed group are different
- [You] invited people to join ... in my mind I thought we were starting off a whole woman’s network that would actually save the world .....but women working has become normal and I think that we've bedded down into all the ways that women have grown and become more relaxed in what they do
- It's the membership that makes the difference

**Question 2**

- Always becoming – I relate totally to that and I never want to get there
- [The group is] phenomenally important
- Us growing old together
- That little bit of competitiveness – have I done it right?
- She said it for me – identity
- It’s like the Americans do their screen writing of sit coms ... they're all adding .... Someone adds a bit of fun .... So you get the whole .... The whole is absolutely fantastic
- The group’s a wonderful food
- I am part of something bigger than me
I felt it was important ...to own up to some of...the things I don’t like about myself...in a group...as well as the things that I enjoy...so talking about a bit of competitiveness is part of that

When I’m with clients they need safety and they need a container but they also need to feel some very difficult things

There’s an element of risk

[I’ve never liked agendas but I’ve sat back, I’ve respected that people want control and want timings ...it works] because I’ve made it work for me [Analysts’ Comment (AC) – an example of compromise for the good of the group]

I wouldn’t be without the structure now for any of the world

There something about meeting half way – swinging backwards and forwards – it’s the balance isn’t it?

We will never resolve it, because we are different. So it’s fine unless we actually ...come to blows! [AC-acceptance of difference]

It’s a precious time

[You] invited people to join ... in my mind I thought we were starting off a whole woman’s network that would actually save the world .....but women working has become normal and I think that we’ve bedded down into all the ways that women have grown and become more relaxed in what they do

It’s the membership that makes the difference

We have kept our aims quite selfishly in a way haven’t we? [AC – checking for agreement] We could have got more involved with ... helping women, young women. It's a bit of a selfish group.

[When we came together] the focus was professional whereas the experience has been more geared – well actually, it’s perhaps more about personal to the professional

Question 3

I like to negotiate change

Question 4

Us growing old together

I felt it was important ...to own up to some of...the things I don’t like about myself...in a group...as well as the things that I enjoy...so talking about a bit of competitiveness is part of that

I was quite amazed at how emotional experience that was [writing piece]

It made me realize that having had lots of friends, in married life and been the centre of a social network .... Lots of people around and things like that. And then that coming to an end [through divorce] and then forging new friends....this [the group] is very important. There’s nobody else I could talk to like that [reference to the conversation the evening before]

There’s a lot that we talk about here that we probably don’t talk about [elsewhere]

Question 5

The things about not wasting time, I think is kind of mismeaning, in a quantum world

You always get cross when something isn’t actually happening your way – it’s part of life [in this group] it’s kind of just right I think – just a mild irritation on both sides, we’re not falling out over it are we?

Maybe a definition of pfaffing would be good [AC – clarity/shared meaning – to enable group to talk about ‘a thing’ in the same context, shared understanding – a
recognition that we are all different and have this worked out as a way around the differences.

- I do mean it pejoratively [AC - an example of not allowing someone else to speak for you]
- I think that we're all women is absolutely fundamental to this group and to the glue that's kept us together, because of a lot of not just common experience but common ways of experiencing
- I had been very badly burned at Greenham by radical lesbian feminists and hated that experience
- We have kept our aims quite selfishly in a way haven't we? [AC – checking for agreement] We could have got more involved with ... helping women, young women. It's a bit of a selfish group.

Anything else significant

- Us growing old together
- I didn’t want the whole thing [my writing about the group] to be a eulogy ... that everything’s fantastic ... That’s why I talked about the ambivalence and feelings when I think about coming....there’s an anxiety there. I’m a bit anxious about exposing myself in a group and maybe feeling inferior ....and yet this is a group that we all say is the safest haven for us but we still have that anxiety about performance [AC – would we make as much effort to be understood in a group we didn’t value?]
- There’s a spikiness that I would like to resolve because ....we do need a bit of negative-positive charge, don’t we
- Quite a lot comes through to me, coming in later, about control, structure, pfaffing, not staying to the point ....that obviously irritate some people more than others and I think that might be something that it’d be quite good to look at because it’s been running through .... And doesn’t seem to get resolved [AC – individuals compromise for the good of the group]
- What I perceive as pfaffing is very low value ...white humming noise at the bottom of the pyramid
- Why are you taking that view? Why should the pfaffers [compromise]? [AC – people are identified as pfaffers]
- Look deep and make sure you’re not just trying to wind people up, deep down
- I miss a few pearls – the hearing [AC – how much do we as a group pay attention to A’s hearing loss?]
- We will never resolve it, because we are different. So it’s fine unless we actually ...come to blows! [AC-acceptance of difference]
- If everybody’s alright to do that? [AC – example of asking for permission]
- We’re here as humans aren’t we? [AC – example of placating statement or a pragmatic move? Checking again]
- [Something we might like to think about] ...looking outwards ....we’re quite a great model actually and it might be a way of somebody like that, a young person coming, actually experiencing what we do? And it may be something that she goes off [and sets up] herself
APPENDIX 22 COLLATED DATA FROM QUESTIONNAIRES

Analysis of returned questionnaires against research questions (05.02. 2014).

Themes and pertinent quotations collated from both analysts, using same numbering system for respondents. (8 respondents: 3 women who no longer belong to the group [respondents 1, 2 and 8] and 5 of the remaining 7 group members [respondents 3, 4, 5, 6, and 7]). Red text is used to highlight comments that indicate dissatisfaction, discomfort or criticism of the Group.

**Question 1: What encourages, influences and motivates people to engage with and participate in professional learning groups?**

**R1 (past member)**

- Opportunity to be part of peer group, socialise, network and learn from each other. Although we didn’t all know each other, intertwining histories was fascinating and made for a good level of trust
- Sharing bits of our personal lives
- The other key factor would have been where we each started from, in terms of our knowledge of the other members and how we knew them
- I hoped to generate and play with ideas – with like-minded and challenging peers
- Wanted to learn from the group, individual feedback and reflection; wanted to learn and grow
- I like to be social with like-minded people
- (Some of ) the others had a long history of working together
- I would not deliberately seek out group situations for learning mainly because I don't think that approach suits my learning style
- A work and learning focus

**R. 2 (past member)**

- Novelty, networking, interested to meet with other women working in a similar field at the same time, fun!
- I enjoy being in a group but not sure if it is my preferred method for learning

**R.3**

- My own professional development
- Something more ongoing where I could develop good relationships with others and trust them to provide me with the kind of useful feedback that I might get from colleagues if I worked regularly with them
- I learn well in groups through conversation and discussion – at least, that's what I enjoy as a learner

**R.4**

- I seek out group situations for learning

**R.5**

- Aspiration, exploration, support
- I tend to gravitate towards groups but they also tend to gravitate towards me
R.6
- Professional support with other women; like-minded people
- Wanted to ‘heal’ wounds [from previous experience of women only events]
- 70% likely to seek out group situations as my preferred forum for learning

R.7
- To network, share experiences, work practice, marketing, learn from others in a supportive and non-competitive atmosphere. Have some fun and relaxation

R.8 (past member)
- It was of interest to me personally and I thought I could benefit from it professionally too
- Fun
- At first I thought the group action learning type approach would suit me but I am too independent and too much of an individual learner
- I didn’t want to join just any group
- Activities

Summary of themes:
5/8 respondents stated that professional development was a key reason to join the group; 3/8 stating the need for networking; a more generalised view for learning (6/8) was given.

Question 2: What sustains this engagement and participation?

R.1
- I loved many things about being part of the group, I would not have spent those weekends away unless I really wanted to go
- We were functioning as both a team and as a family, working together on topics and exercises and as a family, all pitching in together very informally at someone’s house
- I valued the comradeship and nurturing from other women
- Being into your work was totally acceptable
- Learning how great it was to get to know other women with a work and learning focus to the social contact – rather than the basis for connection being family, or kids, or partners, or hobbies
- There were no real disadvantages but certainly challenges
- We always had a feedback session – which was structured – which was really good but I found it difficult to be as authentic as I would usually want to be because straight after the session we would all be going our separate ways
- I’m not too good with too many people for too long, particularly if there is a lot going on at an emotional level
- If we arrived with baggage (some people did and it affected the dynamics, discouraging openness, because people's stuff was taking up what might have been...
an open space) – when this kind of thing happened I felt uncomfortable. An issue for me all along was the extent to which I could become fully part of the group

- There was a clash of personalities/ a simple clash of personalities between myself and one member of the group. Sometimes things just don’t work out
- It was never going to be that all members would engage with the group in the same way or want or get the same level or type of satisfaction or pleasure from it. And thinking about it now, perhaps we should have got that fact out there right up front and worked on what we could do to optimise the chances of the group working for most of the group most of the time and all of the group some of the time. I think that we did have some kind of agreement and ground rules but perhaps we should have paid more attention to this
- Having dual objectives (social/professional) was maybe too much to ask. Though definitely positive in some ways, there were also ways in which the two things were in conflict
- I didn’t have enough energy left after a busy week and, usually, a long drive to put my all into the ‘work’ part of the weekend even though I wanted to - I guess I felt like I’d done enough thinking in the week
- I was looking for something much more serious and challenging with a deeper level of thinking involved and really focused feedback – to have gone deeper we would have needed more time (to reconnect and re-establish trust, open yourself up, give carefully considered feedback to others, process it. We all knew that if we pushed it we might have to live with fallout or have to travel home with things unresolved
- Without a facilitator we had no safety net – to have a designated facilitator would have changed the experience completely and I don’t think that’s what anyone wanted – I didn’t want that. But were we actually self-facilitating or were we simply facilitator-less?

R.2

- Sometimes I really enjoyed it and it was great fun. Sometimes I learnt new things and it opened up new ideas to me.
- [I left because] I had joined another [local] group that I was enjoying
- I felt the balance of the group was too similar and at times I felt like I didn’t fit in or wasn’t totally open about how I felt. A lot of times I wanted to tell people to stop taking everything so seriously and being so earnest. I felt like my role was to add a bit of mischief to the proceedings
- I never really looked forward to the weekends. They always seemed to be an interruption and seem to require quite a bit of preparation e.g. food, hosting, presenting a topic etc and with animals, children a husband working away and no family nearby it was always difficult to find cover. I would have preferred just to turn up! Being local would’ve worked better but difficult with such a dispersed group
- I found out how impatient I am in a group. I am [now] in an action learning set – small business owners – it is working okay but the commitment to turn up sometimes is not great, a bit like it was with [the group] at times. Funnily enough, the check ins are getting long and drawn out just like [the group] and I am getting frustrated

R.3

- My experience has been variable over the years but predominantly positive
- We are more honest with each other now, are better able to appreciate the differences amongst us
I've learnt a lot from other group members and from visiting speakers/organised sessions – some related to my professional development and others having nothing to do with it but still interesting and useful
I like the closeness, mutual respect and fun that we have
We changed our focus and my expectations of the group changed
Plenty of challenges, challenged my own identity and view of myself [could be encouraging or discouraging of sustaining membership]
There were some personality clashes perhaps

R.4
Big advantage [of the group] is feeling safe, known and understood
I simply couldn’t imagine being without you all

R.5
Exciting, inspiring, engaging, affirming and a catalyst for self-reflection
It [the group] met with my morphing expectations
Knowing I could miss a weekend, that I would be missed and that I would miss everyone
Being formal

R.6
I often don't want to go to group meetings before I go (time pressure?) but always get a lot from it, quality experience and contact with others
I enjoy a mixture of creative, active and intellectual activities over a weekend and the wonderful social times we spend together

R.7
I have always found the group to be highly supportive, challenging in a non-judgemental way. I can and have been myself
We have grown and changed in our needs as we have got older and work situations have changed
We had a thin period and decided to meet less often which proved [the group’s] value to us/me
Social contact
I function well in a group context with ideas flying around, it stimulates and motivates me which is as essential as air for me

R.8
It was a great time most of the time with friendship and laughter.
Enjoyed being together, it was always a nice friendly time. A reunion each time we met but there was so much pressure on commitment [to the group]
The benefits were to look at situations and understand the dynamics of the group and my own personal strengths and weaknesses
There were some really good sessions, really interesting
I didn’t see myself going along to learn new things but I sometimes did and I liked to get my teeth into this. It felt more like a group having an experience. More about understanding than learning
I have good memories of it but wouldn’t do it again. Can remember all of the sessions, they were really interesting and some were very useful.

The group became too emotional with some attention seeking individuals. The more you cried the more attention you got from the group.

I … had problems with X, many problems, particularly with the attention she sought.

Perhaps it was just a personality clash….I think that the group changed and moved away from professional development to therapy for X – that seemed like its main focus and I was paying a lot for this! I didn’t want the focus to change, I wanted it to stay with professional development rather than moving towards emotional or personal development.

Less meetings and less travel [would have encouraged me to remain a member], it was hugely difficult to pay for and arrange for child care.

I prefer to be on my own and learn in my own style – I am too independent and too much of an individual learner I think.

I’m not much of a group person. If I want to learn something I seek it out for myself and put it into action. I’m too independent – independent financially, I don’t like being dependent on others for anything. As a child I brought myself up. If I didn’t do it for myself it wouldn’t happen. It was very much part of my upbringing and is there in every aspect of my life. I’m still like that even though I’m in a relationship. It’s about standing on my own two feet.

I did not always understand though, the group dynamics. I wasn’t into the group thing as much as other people.

[My] lack of commitment to being away from home.

The format of the group became too focused on individuals’ emotional needs.

Not enough variation with professional inputs from outside bodies.

Became too insular.

More group counselling than development in the professional field for me at the time.

Maybe, looking back, I should have tried harder. It was the easy option to leave.

If the group had been more local it would have been very different.

Summary of themes:

Learning (3/8) within an honest (2/8) supportive and loyal group (3/8).

The need for interesting, challenging learning (4/8).

Compatibility and understanding (3/8) based on trust (3/8).

Positive social interaction (2/8).

Having an active approach to learning (5/8) with two of these noting that they also use a more personal approach to learning.
Question 3: What is the efficacy of self-directed and self facilitated groups in achieving ongoing, transformative, professional learning?

R.1

- I can remember welcoming the idea that as all the members were strong and confident, I would not end up leading by default, which tends to happen with groups I join because I feel things are too loose. I will tend to take the lead and draw everyone in to think through what’s going on and get things organised
- Had there been a facilitator I would have turned to them for advice or assistance but without that option I decided that I did not want to deal with the issue which was mine and I had a choice to either live with it or leave the group
- Maybe we should have spent more time learning about each other quite deliberately in preparation for being self-facilitating. And working out how to self-facilitate
- Maybe transactional analysis would have helped us – to make this thing work we were going to have to commit to being in adult to adult mode for most of the time and to make opportunities for glorious forays into free child. Instead, my memory is that we spent quite a bit of time in various permutations of parent child with child-parent as team members used the group to unpack (sometimes just dump) and process personal issues, or simply could just not uncouple themselves from the rest of their lives for two days
- In the learning sessions, the same modes came into play making interaction and feedback less robust than it might have been. I think the default mode was to take for granted that we’re all adults here and we trust each other, so it will be fine if we just hang loose and go with the flow – without need for discipline or learning to establish habits. My memory may be exaggerating these things but, nevertheless, I know they had a significant effect on the dynamics of the group and on the extent to which I opened up and was prepared to open up with the group
- Boundaries were unclear and subject to adjustment due to circumstances and ground rules for one agenda would not always work for another. Not comfortable for me given my need for a bit of order!
- Not feeling confident enough with the group to take risks and unconscious collusion to not appear competitive, too different or challenging. A facilitator would have pushed people to stretch and deliver more and encouraged through barrier
- At the end of each weekend we always had a feedback session which I seem to remember was structured. Having a feedback session and everyone saying where they were at was really good except that I found I didn’t want to be as authentic as I would usually want to be because straight after the feedback session we would all be going our separate ways
- I’m strongly attached to the idea of self-facilitation with its promise of empowerment, shared responsibility and shared exploration, but there were times when I felt we were at sea without chart, compass, captain or rudder
- Would have been good to have a clearly identified self-facilitation methodology or model to follow and use as a reference point. Did we have that?
- Not having a single facilitator does make the group members take responsibility – but only up to a point
- Maybe we should have identified what a facilitator does that a self-facilitated group needs to do for itself, and how it’s going to do it
- One effect of not having a facilitator was that things went unsaid and undealt with as there was no certainty about being able to manage the process, no safety net
- Generally I think the group was incredibly loyal and mutually supportive, but inevitably there were times when individual members were having difficulties
with the group and sought out others individually to discuss their issues. This was a hidden element of the dynamics that could have been destructive though in this case I don’t think it was. Had this been a facilitated group, any member with an issue could have gone to the facilitator for help, or to ask for support in ‘going to the group’

- To have had a designated facilitator would have changed the experience completely and I don’t think that’s what anyone wanted. I didn’t want that. But were we actually self-facilitating? Or were we simply facilitatorless?

R.3

- Being formal [was a challenge]

R.8

- We did look at situations and sort of looked at the dynamics of the group. I did not always understand though, the group dynamics.

Summary of themes

(Fewer themes emerged in response to this question although a number of points are raised above which are relevant to discussion of this question.)

Useful if focused on learning (4/8)

Met professional/personal expectations (4/8)

Able to put learner outside comfort zone (2/8)

Question 4: What are the implications and outcomes for participants as a result of long term membership?

R.1

- What I actually gained from the group was probably a bit different to what I hoped I would gain
- Some members of the group who knew each other well were very comfortable with airing their personal stuff
- I felt we [had] a common bond because of what we all did for a living, some common background and experiences
- To have gone to a deeper level we would have needed more time
- I felt we were mostly true friends with a common bond because of what we all did for a living, some common background and experiences, and a growing fund of time shared together
- Apart from the one person with whom I clashed, I feel that we all still have a common connection and I could pick up with them anytime. That’s a very good thing to come away with and still have
I know my professional practice did benefit from our learning sessions but I can't recall anything specific. However, I did learn more about myself from how I experienced the group and about how groups like that behave. That learning has certainly been beneficial.

R.2

- What I wanted was a group that I would feed off for inspiration and motivation – it didn't really happen for me
- Sometimes I felt it was too familiar and cosy – when we recruited new members we sought people who fitted rather than someone who was different and might have brought a new angle, challenge or dynamics to the groups. Similarly with new topics – I think sometimes we avoided controversial topics
- There was a sense of belonging to something
- I did discover things about myself
- I made new friends but unfortunately not great friends as I don’t see most now anymore

R.3

- Initially we talked about our expectations of the group and for the first few years the group met my expectations ... we changed our focus after that and my expectations of the group changed
- Challenging my own identity and view of myself – my lack of tolerance of others and having to learn to manage that

R.4

- Feeling safe, known and understood
- Being able to ‘dare greatly’ if you like
- I simply couldn’t imagine being without you all

R.5

- Being with other women, feeling safe to express difficulties and safe to hear others’ difficulties

R.7

- We have grown and changed in our needs as we have got older and work situations have changed

R.8

- I have good memories of it but wouldn’t do it again

**Summary of themes**

Commitment to the Group (2/8) both an advantage and a disadvantage
Improved self-learning (3/8)
Time constraints/travel (3/8)
Question 5: If successful learning groups are defined as those in which participants continue to achieve their learning goals, why are some groups successful and others not and what enables ‘success’ to be sustained?

R.1

- What each member wanted from the group and [how] each member experienced it would have been different depending on the way they typically interacted in groups/teams and maybe on their family backgrounds
- It was never going to be that all members would engage with the group in the same way or want or get the same level or type of satisfaction or pleasure from it.
- Having dual objectives (social/personal) was maybe too much to ask. Though definitely positive in some ways, there were also ways in which the two things were in conflict
- I was really looking for something much more challenging and serious with a deeper level of thinking involved and really focused feedback. I felt there was quite a strong sense of ‘don’t let’s get too heavy’ and I shared that too when I realised that what I would have liked and what could realistically be achieved in the time and given the dynamics were two quite different things. To have gone to a deeper level we would have needed more time and also a real shared project of a ‘wicked problem’ that we just had to solve
- I know my professional practice did benefit from our learning sessions but I can’t recall anything specific. However, I did learn more about myself from how I experienced the group and about how groups like that behave. That learning has certainly been beneficial

R.2

- What I wanted was a group that I would feed off for inspiration and motivation – it didn’t really happen for me. I do like to listen to people who motivate and inspire me

R.3

- The storming stage of team development – we came out the other side
- We changed our focus after that and my expectations of the group changed. It became more about personal development (which in my view still relates to my professional development) and I had to really think about whether I wanted that at the time. I decided that I did!
- I’ve joined 2 triads [since being a member if the group]. I’ve found both very useful. One came to a natural conclusion and the other is still ongoing after 3 years

R.5

- It [the Group] met with my morphing expectations

R.6

- It [the group] has met my expectations and exceeded them
We have grown and changed in our needs as we have got older and work situations have changed.

Personal and CPD needs were met. My initial hope of gaining other work/marketing and achieving new clients was not so successful. Maybe I had changed too.

In terms of general learning every meeting brings new things or ways of looking at old things.

It was more surviving with the pressures of home life.

It would have been good to have off shoots – perhaps each person in the group could set up something local for their own area [to deal with problems of travel?]

**Summary of themes**

Learners who enjoy group work (3/8) appear to gain more from a self-facilitated learning group.

Group needs to change and evolve over time (4/8)

Developing a feeling of loyal, honest companionship (2/8)

Positive group dynamics (3/8)

Use of outside speakers (2/8)
APPENDIX 23  IMAGE OF IDENTITY MIND MAP
IDENTITY:

- Membership is part of my identity
- Friends envy my membership, my respect for them affirms my value of group
- Value of personal development and other values are honoured by the group - we try to live them
- Friends like it now it focuses on personal development - they were a bit intimidated by the business focus
- Our meetings over a long period of time give a common vocabulary
- Curious and interested
- Group helps me to affirm, question and change my own identity
- Assumption made that members are all heterosexual
- I realised it was part of my identity when friends ask 'when is the next meeting?'
- 'Girls' - using the term makes it ageless to me - young in spirit
- Use critical/analytical thinking and stretch our thinking in meetings - BUT NOT NERDS
- Women - learners - professional - all are aspects of identity
APPENDIX 24 REFLECTIONS ON THIS STUDY

Part 1  The Group’s reflections on participating in the study: an epilogue?

The data generation and analysis sessions for this participative investigation were completed by the Group during May, 2014. As mentioned in the main body of this thesis, there was some reflection during each meeting in which the Group was engaged in research-related activity. In October of 2014, having all had an opportunity to familiarise ourselves with the draft findings from the research, and several months to reflect on the whole process as individuals, a further reflective discussion took place during which we shared our views of how we had experienced participating in the project. Notes from this conversation were recorded on flipchart sheets and images of these are included in this appendix.

The notes reflect the data generated during the study in that they further demonstrate Group members’ enthusiasm for learning and for being challenged. It was clear that we had all enjoyed our involvement in the process. The research provided intellectual stimulation and appealed to Group members’ curiosity and desire to understand and make-meaning - in this instance, of the Group itself. For those without personal experience of research at doctoral level, including myself, involvement in the project demystified what this might entail. For one woman, having considered a PhD to be beyond her grasp and capability in the past, undertaking a doctorate in the future became a distinct possibility.

Some members were stimulated by particular topics in the literature or felt that they could make use of both the literature and the findings in their own work with groups, clients or students, particularly those working in an academic context. However, it was also clear that certain aspects of the research presented difficulties, created ‘disturbances’ or felt uncomfortable for some people. Reading the draft chapters of the thesis was sometimes challenging, particularly the analysis of the literature and the methodology chapter.

The ‘disturbances’ and discomfort mentioned above were generally experienced on an individual level, rather than between Group members or for the Group in its entirety. For some, contemplation of their own identity and their personal
transition from active practitioner to another stage of life had provoked individual reflection that they had not found easy. Nevertheless, the identity-related conversations were seen as an opportunity for personal ‘remodelling’ and further development of self-understanding. Others were strongly affected by the results relating to leaving groups and the notion of groups becoming fortresses (discussed in Chapter 5). Some saw this aspect of the research as also relevant to their own, ongoing facilitation of other groups or their practice as educators in academia. Other members were more concerned about how leaving had been dealt with by the Group in the past and planned to renew contact with those who had left. As one, the Group agreed that it should return to ‘leaving’ as a topic for further discussion during 2015.

Through participation in the research, members felt that further bonding had taken place, strengthening the relationships between us and affirming that being a part of the Group is ‘a great opportunity’ and ‘an amazing experience’.

‘As we engage in a reflective research process our stories are often restoried and changed as we “give back” to each other ways of seeing our stories’, (Clandinin and Connolly, 1990:9).

Clandinin and Connolly’s observation certainly resonates with the Group’s experience of sharing stories and experiences through this research, particularly through the individual narrative accounts and in response to the question addressing the impact on individuals of their long term membership. For the Group, hearing, discussing and probing each other’s perceptions surfaced thoughts and feelings about membership of the Group that were new and changed previously held beliefs and perceptions.

For some, membership of the Group has been primarily for their own satisfaction and enjoyment – a ‘selfish’ engagement, as one woman put it. But, participating in the research, as another woman remarked, has ‘made me look outwards’. There is now a view that being ‘self-congratulatory’ might not be enough and that the Group should give further thought to how it can share what it does with others. Involvement in this research and anticipating that the outcomes and findings might be shared through publication was seen as one way that such sharing might occur. However, it was also felt that academic publications might only reach a
relatively small audience and that more discussion and thought is required to consider other options.

Overall, there was a definite sense of a desire to take things forward, both within the Group and as individuals, as the above points demonstrate. Towards the end of Chapter 6, completing the write up of this research for submission is described as a milestone rather than the end of a journey. For the Group, completing the data generation and analysis stages and providing feedback on draft chapters also appear to be milestones, rather than end points, in its own ongoing journey to make meaning.
Flipchart Sheet 2 (of 2) Group reflections on participating in the research
Part 2  My own reflections on this study

On participative research
The adopted participative approach and the involvement of Group members throughout the process served both to maintain the democratic nature of the Group and minimise the degree to which my own interpretation of the data has shaped this study. The main body of this thesis provides what I believe to be a reasonable degree of detail about how a participative approach was implemented, and I hope to find ways of both sharing my own experience and advocating the approach to other researchers in the near future. Despite the challenges that I experienced associated with 'letting go' of the research, (see Chapter 6) and the potential criticisms that might be levelled at it for its epistemological inconsistencies (see last section in this appendix), I am convinced that participative research goes a long way in addressing the power differences between researchers and the researched (see Chapter 3).

In addition, I believe it has been important to remain reflexive during my writing up of the study, further extending the participatory methodology through a series of iterations of the draft thesis with several members of the group. Their feedback has mostly been focused on the retelling of their contributions (given during data gathering,) and interpretations (given during data analysis), and any descriptive content within the thesis that relates to the Group and its history. This has ensured, as far as possible, that I have not misrepresented the rest of the Group. Where the interpretations included in the write up are my own (specifically, in the analysis of the literature and in chapters 5 and 6,) I have attempted to be transparent about this.

The electronic journal that I started to keep during the early months as another mechanism for reflexivity was soon abandoned for handwritten note books in which I kept a note of any thoughts, observations and feelings together with notes on relevant reading, references, and ideas. These notebooks became invaluable in helping me to organise both my thinking and my writing once I started to draft out chapters.
My overwhelming feeling as I near submission of this thesis is one of being privileged - to have had the opportunity to undertake this project has been an experience without comparison in my own learning journey. At times I have felt frustrated, out-of-control, and bewildered. At other times I have glimpsed something or grasped a concept that had hitherto eluded me and been left feeling almost euphoric. At this stage of the research I am mindful of T.S. Eliot’s, ‘Little Gidding’ (1942), the last of his Four Quartets:

‘We shall not cease from exploration
And the end of all our exploring
Will be to arrive where we started
And know the place for the first time’

This feels absolutely relevant to my perceptions of the Group as a participant, to my understanding of doctoral research and to my interpretation of the literature that I have encountered on this ‘exploration’. However, rather than lamenting this and wishing that I had known at the outset what I know now, I am thankful for the opportunity to explore and grateful for where the exploring has led me.

**And finally, a last short section on learning**

Learning is central to the Group and has been central to this study. Chapter 2 included a lengthy discussion on perceptions of learning and ‘learning’ appeared frequently in Chapters 4, 5 and 6. I agreed with Hodkinson and Macleod (2010) that holding a view of learning at odds with the methodology utilised in a study is difficult. To this end and in recognition of the impact that a researcher’s personal epistemology has on their research, I explained my Pragmatic position and attempted to clarify my own thoughts and beliefs on learning, knowledge and truth. In Chapter 5 some attention was given to the Group’s perceptions on learning and mention was made of various learning metaphors, all of which were represented in the data. Reflecting on this and the lack of consistency within the Group, it occurs to me that at no point in its history, including during this inquiry, has the Group considered the perceptions of learning and knowledge held by its members. It will be evident from earlier sections of this thesis that there has been
considerable debate within the Group about self-direction and *what* we want to learn about. The Group’s review process has also paid much attention to *how* we learn together. However, personal epistemologies have not surfaced as important and no attempt at alignment has been made in this respect. Given the participative methodology employed in this research, I should perhaps have taken the time to clarify all of the researchers’ epistemologies at the outset rather than just my own, as there are clearly implications for choice of method and the interpretation of the data during analysis. At this stage, I am thankful that we were all thinking along the same lines whilst deciding on data collection methods and during the analysis sessions. But, perhaps this should not be a surprise: I doubt that it is a happy coincidence and suspect that it is a further consequence of the Group’s longevity, our knowing of each other and our becoming.