A Transformative Edge

Knowledge, Inspiration and Experiences for Educators of Adults
# The Contributors

<table>
<thead>
<tr>
<th>Editors &amp; Authors</th>
<th>Authors</th>
<th>Authors</th>
<th>Authors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ursel Biester</td>
<td>Manuela Bosch</td>
<td>Jutta Goldammer</td>
<td>Dror Noy</td>
</tr>
<tr>
<td>Marilyn Mehlmann</td>
<td>Marcus Bussey</td>
<td>Griet Hellinckx</td>
<td>Bálint Öry</td>
</tr>
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<td></td>
<td>Martin Cadée</td>
<td>Manuela Hernández</td>
<td>Olena Pometun</td>
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<tr>
<td><strong>Artists</strong></td>
<td>Clinton Callahan</td>
<td>Thomas Herrmann</td>
<td>Friederike Riemer</td>
</tr>
<tr>
<td>Boris Goldammer</td>
<td>Nils I. Cornelissen</td>
<td>Lana Kristine Jelenjev</td>
<td>Elena Rodríguez Blanco</td>
</tr>
<tr>
<td>Suiko Betsy McCall</td>
<td>Hadas Fisher-Oren</td>
<td>Frans Lenglet</td>
<td>Anneke Schaardt</td>
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<td></td>
<td>Christian F. Freislben</td>
<td>Lawrence Kampf</td>
<td>Klaus Schenck</td>
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<td></td>
<td>Caitlin Frost</td>
<td>Neža Krek</td>
<td>Virág Suhajda</td>
</tr>
<tr>
<td></td>
<td>Diego Galafassi</td>
<td>Floor Martens</td>
<td>Zsuzsa Vastag</td>
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<td></td>
<td>Robert Gilman</td>
<td>Wilmer Meneses</td>
<td>Nikolaus von Stillfried</td>
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<td></td>
<td>Frauke Godat</td>
<td>Veronika Mercks</td>
<td>Daniel Christian Wahl</td>
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<td>Jasenka Gojšić</td>
<td>Irene Nolte</td>
<td>Lina Westermann</td>
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<td>Felix M. Wieduwilt</td>
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<td>Olena Zarichna</td>
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A Transformative Edge
Knowledge, Inspiration and Experiences for Educators of Adults

edited by Ursel Biester & Marilyn Mehlmann
designed & illustrated by Boris Goldammer & Suiko Betsy McCall
Transformative learning is a topic of critical importance to education in the “full world” of the Anthropocene. A Transformative Edge is a book for the Adult Education professional to dip into an unusual and inspiring mix of theory and praxis, of the professional and the personal, with perspectives supplied by 40 contributing authors.

Ernst-Ulrich von Weizsäcker

Across one’s career the request for a “come up to speed read” on change and transformation is common. “A Transformative Edge” can be recommended without knowing the previous knowledge of the asker. That’s pretty amazing. A broad range of experiences with leaders expressing them concisely is hard to find. There is little duplication and the different views on similar topics are highly instructive. Creative versus reactive, versus dynamic was one of my favourite frameworks. There were many competitors for that spot.

David Wilcox, CEO, ReachScale

An encyclopedia of alternative, authentic and human centred learning, bursting with comprehensive choice tools and methods to nurture social and emotional constructivism through emphasizing the inter-action of people, knowledge, beliefs, values and experiences.

Simon Kavanagh,
Director of KAOSPILOT learning design agency.

Bravo for this work, beautiful in spirit, rich in content and pleasing in presentation.

This anthology will be an inspiring companion to all who have understood that henceforth our world requires the transmission of knowledge and process of learning to be done in total consciousness.

Raphaël Souchier
Fondation Université de Bretagne Sud
Table of Contents

Preface: About this book .......................... 5
Introduction ..................................... 6

A. Competences .................................. 8

Competence Elements or Categories .............. 12
Experiences with Competences Frameworks .... 14
Bright Future Now ................................ 15
Possibility Management .......................... 16

B. Theories ....................................... 20

Overview ........................................ 21

Self-knowledge .................................. 22
Community of Inquiry Online ...................... 24
Rites of Passage .................................. 28
Critical Thinking .................................. 30
Transformation through Embodied Learning ... 34
Focusing .......................................... 38
Reactive vs. Creative .............................. 44

Working with People ......................... 49

Social, Transformative, and Collaborative Learning .... 50
Rogers’s Person-Centred Approach ............... 58
Habermas and Transformative Learning ........ 62
Process Work .................................... 68

Envisioning ...................................... 75

Kissed by the Muse Model ...................... 76

CLA: Unpacking the World – ..................... 84
Anticipation and Grace Hacks ..................... 88

Riding Complexity ................................ 93

Diffusion of Innovations ............................ 94
Symmathyse ....................................... 98
Systems Thinking .................................. 102
Learning for Change ................................ 110
Positive Deviance .................................. 113
A Learning Organisation ........................... 115
Action Research ..................................... 116
Complexity Theory ................................ 120
Peacebuilding and Non-Violence .................. 124
Warriors of the Heart .............................. 127

Flow .............................................. 131
Emergent Learning ................................ 132
Theory U .......................................... 136
Designing Regenerative Cultures .................. 140
The Transformative Learning ........................ 142
Theory of Jack Mezirow ............................ 142
Beyond a Single Event ............................ 148
Flow Theory ...................................... 152

Pedagogy ......................................... 159

Paulo Freire – Emancipatory Learning ............ 160
Education for Sustainable Development, ESD ...... 164

An Empowerment Spiral .......................... 168
Action Learning .................................... 172
Suggestopedia: .................................... 176

C. Methods ....................................... 184

Self-knowledge .................................. 187
The Work .......................................... 188
The Work That Connects (WTR), Deep Ecology .... 194
Life Design ........................................ 200
Deep Listening* and Parking ...................... 202
Community of Practice ............................ 206
Creativity and Transformation ..................... 210
The Hero’s Journey ................................ 216

Working with People ......................... 223

World Cafe ........................................ 224
Open Space Technology ........................... 230
Shared Value-Scaling ............................... 234
Non-Violent Communication ...................... 238

Envisioning ...................................... 243

The Future Game 2050 ........................... 244
Three Horizons .................................... 248
Backcasting ....................................... 252
Visualisation: Methods and Impact .............. 256
The Oasis Game ................................... 260

Satir Change Model ................................ 266
Enspirited Envisioning ............................. 270

Riding Complexity ................................ 275
Transformative Dance ............................. 276
Design Thinking ................................... 284
Social Presencing Theatre ......................... 286
The Theatre of the Oppressed .................... 290
Appreciative Inquiry ................................ 294
Living Knowledge .................................. 302
Genuine Contact* .................................. 306
Dragon Dreaming ................................... 310
Complexity & Habits of Mind ..................... 316

Flow .............................................. 323

Systemic Constellation Work in Organisations .... 324
Empowering Facilitation and Coaching .......... 330
Peer-to-Peer Coaching ............................. 336

Pedagogy ......................................... 341

Forest Bathing ...................................... 342
Applied Improvisation ............................ 346
Gamification ....................................... 350


Imagine you are sitting at your workplace and you are about to design an activity that involves engaging people in mutual learning. No matter whether it’s a workshop, conference, seminar, year-long course, speech, stakeholder engagement programme... Your ambition is that after participating in your event, participants might have gained new perspectives and changed their minds about some things.

How would you engage participants in such a journey?

This book is intended to be your companion while designing your events. It offers inspiration, references and an entry or continuation point to the world of transformative learning.

The book was written in a collaborative process engaging many co-authors. Contributors come from all walks of life, all active in the field of transformative learning. For instance, freelance adult educators, consultants using TL theories and methods for facilitating change in organisations, university staff introducing TL practices to higher education.

It is not intended to be exhaustive. Rather, it offers a compendium of models, theories and methods currently found to be useful by some of the leading practitioners in Europe (and a few from other parts of the world).

Beyond being a resource to be picked up when starting to design your TL event, this book is intended to facilitate connections between TL practitioners. Feel free to contact the contributing authors, for example via LinkedIn.
Introduction

What is Transformative Learning?

Mezirow describes transformative learning as “learning that transforms problematic frames of reference to make them more inclusive, discriminating, reflective, open, and emotionally able to change.”

We all change, all the time. The main differences between this commonplace change and a transformative change are:

• Ordinary change can be unconscious, or it can be planned and managed; whereas transformation is the outcome of a process that includes consciousness and a broadening of perspective.

• While ordinary change is reversible, transformation is not: it is not possible to ‘not see’ something that we have learned to see.

Transformative learning can from this perspective be seen as personal and collective empowerment, leading to new insights and greater action competence.

Transformative Learning:
from a Concept to a Body of Theory and Praxis

Transformative learning, first enunciated by Mezirow in the 1990s, accords a central role to the process of ‘meaning perspectives’ through which we make sense of everyday life (Mezirow, 2000). Transformative learning is a form of third order learning leading to “the experience of seeing our world-view rather than seeing with our world-view, so that we can be more open to and draw upon other views and possibilities”.

Both Mezirow and Freire have influenced the current understanding of transformative learning, which “(…) involves a deep structural shift in the basic premises of thought, feelings and actions. It is a shift of consciousness that dramatically and permanently alters our way of being in the world. Such a shift involves our understanding of ourselves and our self-location: our relationships with other humans and with the natural world. It also involves our understanding of power relations in interlocking structures of class, race and gender, our body awareness, our visions of alternative approaches to living, and our sense of possibilities for social justice, peace and personal joy”.

Why is this important?

We live in times of huge challenges and escalating, multidimensional crises, for us and our communities. Faced with complex issues central to the continuity of civilizations, we need many more people ready and able to step into an active role as well-informed and concerned citizens. The promotion of an active and informed citizenship is indeed also an explicit goal of the EU and its Lifelong Learning strategy.

Adding a transformative edge to adult education promotes those qualities of informed and engaged citizenship in participants/students and indeed also in the educators. We are all ’agents’, capable of shifting and capable of influencing our/each others’ lives and the wider community.

Reference

A. Competences

Why Defining Competences is Useful

‘Competence’ refers to a set of knowledge, skills, attitudes, aptitudes and dispositions that any professional practitioner should possess in order to successfully perform their functions and tasks.

In the sphere of education and learning, competences usually refer to those that students or learners should acquire or master at the end of a particular education or exercise. ‘Competences’ are therefore sometimes equated with ‘education learning outcomes’.

The TL facilitators to whom this competence framework is addressed could also be viewed as ‘students’ or ‘learners’, since in a transformative setting all teachers are always also learners. Therefore, the competences discussed here could be considered the outcome of participating in an exercise meant to enhance their TL competence: to ‘sharpen the transformative edge’ of their professional competence.

Competence can also be seen as the standard against which the performance of a practitioner can be assessed. The qualified professional is the person with the competence that the peer group, or wider society, or the law have defined as the standard for evaluating professional competence.

The different elements that make up a competence are interconnected. Behaviour or performance is influenced, motivated and made possible by the way in which knowledge, skills, attitudes, aptitudes and dispositions interact. They have their effect in combination, not separately.

Our Competences Framework

We conducted a survey in the form of structured interviews with a selected group of experienced educators, as described in a separate document, the “Transformative Learning Competences Framework”. The results represent a snapshot of their concerns. We found two overarching dimensions:

- The aspirations
- The foundation

We found six major areas of competence:

1. Self-knowledge
2. Working with people
3. Envisioning
4. Riding complexity
5. Balancing humility and ‘pushing’
6. Pedagogy

Other competence frameworks have a longer history and often a more specific context - for instance, for Education for Sustainable Development. In our open context of bringing a transformative edge to existing educational offerings, the key is to use existing frameworks as a starting point to enable each participant to identify and explore her or his own needs and potential.
The Aspirations and the Foundation

As educators for transformation, we are aware that we are working on a profound consciousness shift. This aspiration guides the direction of our work.

At the foundation of it there are the spiritual, emotional and material needs of the educator. How to stay motivated and energized? How to prevent burnout? How to make a living while making a difference? How to deal with failures, discouragement, lack of community support? This base makes it possible to apply the competences in the real world.

The 6 Competences

The six key competences revealed by the interviews and subsequent analysis correlate well with other relevant educational competence frameworks. We have grouped them in two dimensions, the personal and the professional, and in three contexts: people skills; dealing with a society in transition; and education - see Table 1. Table 2 summarizes their attributes, which are described in more detail in the Competences Framework.

<table>
<thead>
<tr>
<th>Competence Archetype</th>
<th>What I know</th>
<th>What I can do</th>
<th>My attitude</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Self-knowledge</td>
<td>The Sage</td>
<td>I know myself</td>
<td>I am able to change</td>
<td>I want to better myself</td>
</tr>
<tr>
<td>Working with people</td>
<td>The Seismograph</td>
<td>I know about group dynamics and facilitated processes</td>
<td>I can manage groups</td>
<td>I am compassionate</td>
</tr>
<tr>
<td>Envisioning</td>
<td>The Visionary</td>
<td>We all know much more than we know</td>
<td>I can bring out hidden hopes and fears</td>
<td>I accept that the student’s vision may not be aligned with mine</td>
</tr>
<tr>
<td>Riding complexity</td>
<td>The Buddha</td>
<td>The world is complex</td>
<td>I can ride the waves of complexity</td>
<td>I am willing to work with the unknown</td>
</tr>
<tr>
<td>Flow</td>
<td>The Supercoach</td>
<td>People can change in a safe way – also through discomfort</td>
<td>I can focus on the needs of others</td>
<td>I want to serve</td>
</tr>
<tr>
<td>Pedagogy</td>
<td>The Expert</td>
<td>I have large theoretical knowledge</td>
<td>I can apply that knowledge</td>
<td>I am more than my tools</td>
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Table 1
Table 2. Summary of the six TL competences and their attributes
Skills refer to the practical and manual, emotional and intellectual skills for managing, manipulating and modifying physical and social reality, from the simplest to the most complex conditions. They are related to day-to-day tasks and survival (e.g. writing with a pen, self-discipline, showing empathy), to professional performance (e.g. in education, engineering, agriculture or coding), to scientific analysis, and to meeting a variety of challenges (e.g. establishing trust, reducing CO2 emissions or finding a cure for cancer).

Attitudes cover the social-psychological ‘states’ or ‘orientations’ of an individual or group. They refer to the manners, dispositions, feelings and position regarding a person, group, entity, condition, situation or task. An attitude can be held in a more or less conscious manner. Attitudes can influence behaviour and performance. They provide (part of) the argumentation for behaving in a certain way. But behaviour and performance can also shape attitudes: they become the justification for behaviour. ‘Attitude’ is often used to describe a ‘tendency’ or ‘orientation’, especially of the mind. Therefore, ‘attitude’ is often equated with ‘mindset’ or even ‘perspective’.

A person’s aptitude is their innate or acquired ability to do something, to undertake action and to make effective use of knowledge and skills. When ‘aptitude’ is equated with ‘talent’ it is seen as an innate characteristic (e.g. an aptitude or special talent for mathematics). However, through experience and practice aptitude can also be acquired. More generally, aptitude can denote a readiness or quickness in learning; which is usually seen as a sign of intelligence.

Disposition is closely related to attitude, but it also overlaps with aptitude. It is the predominant or prevailing tendency of one’s spirit. It is an individual’s ‘natural’ mental state and emotional outlook or mood. Disposition can be seen as a state of mind regarding something or an inclination towards a certain form of action or behaviour (e.g. a disposition to do good; a disposition to take risks).
As a learning consultant within an innovation project on teaching and learning inside a large state university in Germany (PerLe – Projekt erfolgreiches Lehren und Lernen, project for successful teaching and learning) at Kiel University), I have worked with the CSCT (CSCT = Curriculum, Sustainable development, Competences, Teacher training) competences framework to develop workshop formats for our teaching staff. With the assumption that personal reflection processes on the professional practice lead to a professionalization in teaching, I have developed a half-day workshop for our teaching staff working with problem-based learning formats such as Service Learning, Education for Sustainable Development, and Social Entrepreneurship Education in their seminars.

The workshop is based on a tool frequently used in organisational and human resource development. The tool is called a competency profile. We combined the profile with the CSCT framework. Participants are encouraged to reflect on their professional practice as teachers and compile personal experiences in a learning portfolio. This portfolio is being developed in the workshop and participating teaching staff are encouraged to share their reflections with each other. After the workshop participants have an idea of where they want to develop their practice further. Further workshops in their learning field or a personal learning coach can be provided afterwards.

In essence, the competences framework in this case is used as a tool for self-assessment, self-directed learning-goal formulation, and ultimately for the design of teaching formats for the students in class. In my experience, the workshop and personal reflection empowers teaching staff to be co-learners and co-creators of transformative learning in a traditional higher education institution.

Robert Gilman writes: “We've found this particularly good for people who are:

• More interested in building the new culture than fighting the old
• Ready to combine personal, interpersonal and project-oriented skill-building and growth
• Interested in connecting and collaborating with others from all kinds of backgrounds who also look toward the future with a sense of possibilities.

Because the work is so foundational, it works well for a wide variety of people. Among our more than 200 graduates from 28 countries, we have entrepreneurs, educators, organisational leaders, ecovillagers, lawyers, students, visual storytellers, programmers, parents, artists, activists, consultants, writers, engineers and more.”
Since the 1970s, a committed and growing community has been working to bring to life an ever-evolving collection of practices and perspectives called Possibility Management. In Possibility Management, our ways of relating to thinking, feeling and doing are transformed; this is a process we call ‘upgrading human thoughtware’.

With new thoughtware, you can create completely new life results without changing the circumstances. This unleashes huge human potential. Realizing this potential was what, in 1975, set me on a development path that has unfolded into the global, ever-evolving community of practice now called Possibility Management.

At its core are the twin assertions: “What is, is,” and “Something completely different from this is possible right now.”

Possibility Management is used in numerous applications, such as:
- Transformational personal development (Possibility Psychology)
- Initiations into adulthood and archetypal domains
- Emotional healing processes
- Relationship skills
- Communication, conflict resolution, and decision-making processes for circular meetings
- Remembering how to live without the crutches of modern technology

The Context: Radical Responsibility

Possibility Management is context-centred. Its context begins with radical responsibility. The point at which a culture takes responsibility can be easily determined. For example, if you ask the question, “When a small child makes a mess, who cleans it up?” the obvious answer is, “The parents.” Modern culture is making huge unconscionable messes with no intention of ever cleaning them up. Modern culture is firmly centred on child-level responsibility. Where are the adults? Adults are made by other adults.

Every project, every community, every company, every culture, every government, every religion, makes a choice about the context out of which their rules of engagement and traditional practices emerge. That context determines to what degree responsibility is made conscious, which awareness forms the basis of interactions with children, women, men, with animals, with economics, with materials, with Gaia. It is possible to assess your existing choices and make new conscious choices immediately, even if you have been following your current unconscious choices for decades.
Possibility is an unlimited non-material resource that is one of the most precious on Earth, yet it is freely available to any initiated human being. The objects or circumstances in our lives are not the most precious to us. It is the possibilities these objects or circumstances provide that are precious. Possibility as a resource cannot be owned, so it cannot be commodified. One person with Possibility can change the world. Gaining the skills to create and manage Possibility empowers you to serve your destiny at a high level, co-creating next culture.

Where it’s Going

Resources within the Possibility Management movement continue to diversify, and in ways I never anticipated. In fact, it’s a source of great satisfaction that since 2010 I’ve been able to step back and replace myself with the many qualified colleagues around the world.

So much human potential is squashed in standard school systems and hierarchical organisations. Possibility Management is helping bring these potentials to life to fruitfully engage the daunting conditions overwhelming humanity in the 21st Century.

This is why it is so useful to understand Possibility.

Possibility: The measurable number of options an individual or organisation has available to choose from at any given moment.

Resources

Main website http://possibilitymanagement.org.

Many Possibility Trainers have created their own websites for projects or countries at http://possibilitymanagers.org.

Matrix building multidimensional learning platform StartOver.xyz with over 350 websites.

Callahan, Clinton (2020), Building Love That Lasts
Callahan, Clinton (2014), Goodnight Feelings
Callahan, Clinton (2010), Directing the Power of Conscious Feelings
Numerous publications in German, including
Nagel, Nicola & Patrizia Servidio (2015), Edgeworker: Leadership war gestern
B. Theories Related to Transformative Learning

This section comprises a brief introduction to some of the theories that the Transformative Learning project group has found most useful as a context for the work of an educator. Our favourite theories and models are by no means all in the field of pedagogy but also for instance in such areas as theories of change (personal, collective, societal), empowerment, systems thinking, pattern recognition and complexity research, peacebuilding, human progress, philosophy, sociology, psychology, anthropology, and more.

In other words, there is not yet a unifying theory even though more and more papers are published under the heading of transformative learning, or similar. Our ambition with this section is modest: to give a flavour of some of the theories and models that we and our interviewees have found most helpful; and hopefully to inspire all of us to be open to new impulses from perhaps unexpected sources.

One reason for the complexity is that both personal and collective transformation can be either triggered or supported at every level of being: physical, intellectual, emotional, spiritual. Physically, body changes and bodywork can influence personal transformation while physical experiences e.g. of pollution can influence collective transformation. Intellectually we can ‘suddenly’ gain new perspectives e.g. through Critical Thinking, while a new paradigm explaining us to ourselves can cause a collective shift; as an example, the first images and reports of the earth from space are claimed to have brought about a shift in global consciousness. Similarly, emotional and spiritual experiences can trigger or support transformative change; one area where this is often cited is an experience of and in ‘nature’. The interplay between the individual and the collective is in itself a complex element. It can be said that no collective transformation is possible without individual transformation of many or most of the people who are members of the community. On the other hand, it can also be said that collective transformation provides a framework enabling the individual transformation of many members. Indeed, both are correct: there seems to be an iterative process whereby transformation may cascade back and forth. See, for instance, Diffusion of Innovations below. This multiplicity of paths is well illustrated in both the theories and the methods presented here. In this section we also include some models: depictions of reality that may not have been the subject of peer-reviewed research, but that have proved useful in developing or understanding some of the methods and tools described in Section C.

Most theories and models are relevant to several of the competences; they are referenced under what appears to be the most appropriate competence. For cross-references, see the additional competence icons displayed for each entry.
Self-knowledge

“It’s easy to agree that self-knowledge is a good thing. But what is it, and how may it be acquired? Some paths to self-knowledge are thousands of years old, rooted in spiritual traditions, whereas others, more related to psychology, are relatively new and still rapidly changing and expanding. It seems likely that the psychological approach has developed in response to new psychosocial traumas that were (are) unknown in pre-industrial societies. The two paths are potentially complementary: a spiritually ‘advanced’ person may lack even basic insights into their own psychological make-up, and vice versa. For each of us, the journey towards self-knowledge begins or continues with the question: what in my life am I dissatisfied with? This is thus a potent question for transformative educators and is emphasized in many theories and models as well as in the corresponding methods.

At the root of several powerful models of personal development is the concept of a quest for balance. The balance is of necessity temporary: when it is disrupted, a new quest begins. This model in turn presupposes a reality that is only partially understood. The balance is a functioning view of both inner and outer reality. Any experience that goes counter to that view can disrupt, upset the balance, trigger a new quest. Warren Ziegler thus contended that ‘Change is not something you plan. It’s something that happens when there is a reasonable balance between dissatisfaction and hope’. In the work of Robert Kegan, the individual intermit-tently seeks new levels of meaning that are expressed in terms of balance between the self and its context. One dimension of reality is con-cerned with agency, or empowerment: to what extent the indi-vidual experiences her-/himself as capable of making effective decisions, as opposed to experiencing life - like the weather - as something that just happens.

The essence of being human is, in many spiritual traditions, to discover and fulfill our deep innate potential. And the essence of human innate potential is variously described as for exam-ple a capacity for happiness, a living experience of connection to the divine, the attainment of exquisitely differentiating states of consciousness, a capacity to empathize with all beings.
Lana Jelenjev

The Community of Inquiry (COI) has emerged in the past two decades as one of the most widely cited models for both course development and teaching research in online education. It is an instructional design model for e-learning developed by Randy Garrison and Terry Anderson et al, which is grounded in the work of John Dewey and C.S. Pierce concerning the nature of knowledge formation and the process of scientific inquiry.

Community of Inquiry Online is defined as any group of individuals involved in a process of empirical or conceptual inquiry into problematical situations. It is a dynamic process model designed to define, describe, and measure elements supporting the development of online learning communities. The theoretical framework represents the process of creating deep and meaningful (collaborative-constructivist) learning experiences through the development of three interdependent dimensions of presence: social, teaching, and cognitive.

1 Social Presence

is "the ability of participants to identify with the community (e.g., course of study), communicate purposefully in a trusting environment, and develop interpersonal relationships by way of projecting their individual personalities" (Garrison, 2009). Social presence involves three categories: open communication, group cohesion, and affective expression.

Open Communication - Learners build and sustain a sense of group commitment. It encourages critical reflection and discourse through a process of recognizing, complementing, and responding to the questions and contributions of others.

Group Cohesion - Learners interact around common intellectual activities and tasks. It is achieved when students identify with the group and perceive themselves as a part of the community of inquiry.

2 Cognitive Presence

is the extent to which learners are able to construct and confirm meaning through sustained reflection and discourse (Garrison, Anderson, & Archer, 2001). Cognitive Presence has four phases. This is based on The Guide for Identifying and Eliciting Cognitive Presence.

1. Triggering event: Learners recognize a problem and have a sense of puzzlement concerning the given question or task.
2. Exploration: Learners use different sources and discuss with others to resolve ambiguities.
3. Integration: Learners reflect on the task, link ideas, and try to come up with solutions.
4. Resolution: Learners apply the new knowledge to new situations; they test or offer solutions.

3 Teaching Presence

is the design, facilitation, and direction of cognitive and social processes for the purpose of realizing personally meaningful and educationally worthwhile learning outcomes (Anderson, Rourke, Garrison, & Archer, 2001). It is the key element that facilitates the establishment and growth of social and cognitive presences.

The Community of Inquiry model emphasizes creating an effective learning environment where students feel connected with other learners and with the instructor. It is based on providing engaging, collaborative and well-designed learning activities. How learning unfolds in Communities of Inquiry is based on the interaction of social, cognitive, and teaching presence.
The three presences offer critically important insights into the process of selecting, designing and facilitating learning activities. Activities that can be done to improve on the different dimensions are as follows:

a. Social Presence

The main task is to seek the most effective practices that will set the climate and support the community in building shared understanding. According to a study by Rovai (2007) activities that can help in promoting social presence are:

- Addressing the person by name
- Allowing for sharing of personal and professional experiences
- Encouraging participation

Other strategies to employ are:

- Facilitating and modeling discussions, comments, sharing of opinions
- Personal anecdotes
- Encouraging personal reflections

b. Cognitive Presence

To encourage high levels of cognitive presence, one needs to include purposeful design of the discussion prompts. Discussion prompts are very important strategies to use in promoting cognitive presence. They provide the structure and direct the activity of the learners. There are three different types of discussion prompts:

- Problem-based prompts: typically focus on a problem that is related to the content area and invite learners to discuss and work together to formulate solutions.
- Project-based prompts: similar to problem-based prompts, project-based learning has learners develop solutions to problems.
- Debate prompts: help learners challenge what they know, form arguments, advance arguments, and work through conflicts in concepts and assumptions. Engaging in a debate requires learners to examine, compare, and contrast other solutions, exposing the advantages and disadvantages of the positions. Through debate prompts, learners also acquire experience of persuasion and the art of respectful disagreement.

Skilful implementation of facilitation strategies – the presence of the facilitator is not the only important aspect in cognitive presence. The quality and effectiveness of the facilitation strategies also need emphasis. Questioning and assuming a challenging stance were both identified as effective facilitation strategies.

Questioning is considered the best facilitation strategy. It guides learners in the cognitive process and helps prompt learners to dive deeper into the materials presented.

A challenging stance involves prompting learners to consider different viewpoints by presenting various perspectives. It also helps learners to defend their position by providing evidence and credence to their position.

c. Teaching Presence

is the backbone of the online learning community. Some of the activities that highlight teaching presence are:

- Promptness in giving feedback
- Providing multifaceted feedback – i.e. text, audio or video feedback
- Providing opportunities for peer facilitation

References


Rites of Passage

Function of a Rite of Passage

In its essence, the rite of passage process is meant to facilitate a process of death and rebirth. It's a ceremonial way to foster profound transformation, the symbolic death to the old life and a rebirth into the new. The process with its three phases - severance, ordeal/liminal space and return - is often compared to (and in some cultures for sure has been inspired by) the metamorphosis of a caterpillar into a butterfly via the cocoon-phase. Rites of passage show us an archetypal pattern of how deep transformation takes place. In modern society we often look at transformation as somehow letting go of the old and then moving directly into the new, without putting much attention to the 'in between' phase. In rites of passage the 'in between' phase is at the core of the process and it's in this phase that the deep transformation happens. In their original intention and form, rites of passage have been designed to foster access to intuition, to the sacred, to ways of knowing beyond the everyday practical in this liminal phase. The 3 phase archetypal pattern can be very instructive and instrumental in designing transformative learning experiences, also if they're not meant to be full on rites of passage. Each of the phases comes with specific approaches and questions that help the person moving through the process deeply engage with that phase. For example:

Severance - focus on what's dying and creating space to be able to listen with new ears.
• what is emerging?
• what wants to be born?
• who are the people I/we are called to serve?
• what is emerging?
• who are the people I/we are called to serve?

Liminal / Ordeal - focus on deep listening. Space in between - the old is not there anymore, the new hasn't yet arrived.
• what wants to be born?
• what is emerging?
• who are the people I/we are called to serve?

Return - focus on living into the new story.
• Which gifts are brought back from the journey?
• How can I / we embody these gifts to be of service in a new way?

Note: It's important to sensitize oneself to the aspect of and sensitivities around cultural appropriation when applying wisdom from rites of passage in programmes. Youth Passageways offers a protocol that is very helpful in navigating this terrain: https://youthpassageways.org/ccp/

References


‘Soulcraft’ by Bill Plotkin (2010) offers a profound perspective on the rite of passage from adolescence into authentic adulthood.

‘Working with Rites’ within Knowmads Business School (Amsterdam, The Netherlands) we’ve been offering nature quests for years. Nature quest in this context is a 9 day programme in nature based on the rite of passage archetypal form. At its core is a 3 day and night solo time, where the participants each go out alone to a place in nature, fasting from food, company, shelter and distractions. Each participant prepares for this solo time asking themselves deeply what it is they’re ready to let go of and what is their intention to focus on during the solo time.

Time and again we’ve seen that participants came out of this experience with a profound sense of new aliveness and purpose. Consistently it has been one of the defining experiences of the students in their Knowmads year.

Martin Cadée
For thousands of years, cultures around the world had - and some still have - ceremonial ways to help their people move through significant life transitions (e.g. from adolescence into adulthood). In their essence, most of these processes follow a similar pattern: first a severance from the old ways of being and relating, then a liminal period of ordeal and learning, followed by, when deemed ready, a return to the community with new insights about self and the world, taking on a new role and identity. Arnold van Gennep was the first western anthropologist to study, describe and name this pattern in his book 'The Rites of Passage' (1909). An intact rite of passage is an integrated process in an earth based, healthy, intergenerational community. Our modern society doesn’t offer that context, and hence true rites of passage do not exist in our part of the world, as far as I know. That being said, there are a lot of places where the pattern and elements of rites of passage are a source of inspiration for creating transformative programmes, helping people to step more fully into their lives and find authentic ways to be of service in their communities and the world. Many examples can be found e.g. in the Youth Passage-ways network (www.youthpassageways.org) and in networks of people guiding wilderness solo programmes1.

1 e.g. www.wildernessguidescouncil.org and www.visionsuche.net

Working with Rites

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Critical Thinking

Olena Zarichna

Critical thinking is the ability to think clearly and rationally about what to do or what to believe. It includes the ability to engage in reflective and independent thinking, and to understand the logical connections between ideas. But, more than that, it allows us to make reasoned decisions about everything around us, from what we see in the media to politics to ethics. Instead of blindly following our own or others’ “dogma,” we are able to see more clearly when we think critically (Beth Burgess, Psychotherapist).

Perhaps one of the most important aspects of critical thinking is that it allows you to reflect on yourself, your individual values and beliefs, and make decisions accordingly. People who are able to do this have the most meaningful and fulfilling lives.

Critical Thinking is a route to triggering or supporting transformative learning through the intellect: enabling a change in learners’ frames of reference by critically reflecting on their assumptions and beliefs, and consciously making and implementing plans that bring about new ways of defining their worlds. This process is fundamentally rational and analytical [4].

Christopher Penfield, Assistant Professor of Philosophy at Sweet Briar College considered that “If it is important for thought to be capable of changing both thinker and world, then critical thinking is important; for in its critical vocation, thought calls into question our assumptions about what is possible (with respect to the world, ourselves, our relations with others, etc.) and thereby opens the space for creative transformation”.

In other words, critique is that which makes reflected, intentional change possible; and this is true in whatever domain critical thinking takes place, from art and science to ethics and politics. It is important in all facets of life from work to relationships. Solid critical thinking skills help us to prepare to face a future that can look very different from our present.

Critical thinkers are also people who are most likely to change the world or community around them for the better: to trigger collective transformation.

Many educators realize that engaged teaching and active learning are desirable. Teaching that encourages learners to ask questions and look for answers, to apply what they have learned in order to solve problems, to listen to each other and debate ideas politely and constructively - this is teaching that people can use in their lives. This is teaching to think critically.

In adult education it can be truly transformative. For instance, in my country, Ukraine, it is clear from recent presidential and parliamentary elections that a very large number of voters have not thought through the consequences of their votes. A well-functioning democracy must build upon a foundation of critical thinking by the electorate. It is also clear that in business demand for this skill is increasing.

Critical thinking refers to the ability to analyse information objectively and make a reasoned judgment. It involves the evaluation of sources, such as data, facts, observable phenomena, and research findings [2]. It is a hugely important skill to have today in a world of “fake” news, made-up “facts,” and technological sleight-of-hand. Good critical thinkers can draw reasonable conclusions from a set of information, and discriminate between useful and less useful details to solve problems or make decisions.
Critical thinking develops on the basis of a careful evaluation of not only assumptions but also of facts, using sound logical processes [1]. It is social thinking.

**Top Critical Thinking Skills:**

- **Analysis** - the ability to carefully examine something, whether it is a problem, a set of data, or a text; to examine information, understand what it means, and properly explain its implications. Includes asking thoughtful questions, data analysis, research, interpretation, judgment, questioning evidence, recognizing patterns, scepticism.

- **Communication** - the ability to communicate with others and share ideas effectively; to engage critical thinking in a group to figure out solutions to complex problems. The main skill in communication is active listening. In addition, it includes assessment, collaboration, explanation, teamwork etc.

- **Creativity** - the ability to innovate; to recognize patterns in information or come up with a new solution. This involves flexibility, conceptualization, curiosity, imagination, drawing connections, inferring, predicting, synthesizing, vision.

- **Open-Mindedness** - the ability to put aside all assumptions or judgments and merely analyse information, evaluating ideas without bias. Most important: diversity, fairness, humility, inclusiveness, objectivity, observation, reflection.

- **Problem Solving** - analysing a problem, generating and implementing a solution, and assessing the success of the plan. This skill requires: attention to detail, clarification, decision making, evaluation, groundedness, identifying patterns, innovation [3]. This isn’t about taking more time to make a decision but about saving time later by making the right reasoned decision.

There are more critical thinking skills, such as adaptability, compliance, emotional intelligence, restructuring, optimization, integration, ongoing improvement consumer behaviour and others which are also important in the context of transformative shifts of perception.

**Critique vs Criticism**

For me, one of the key elements of critical thinking has been to differentiate critique from criticism. Criticism is personal, destructive and vague, whereas critique is impersonal, constructive and specific. I still encounter people who confuse the two. For example, a project manager at a recent Futures Workshop who instructed that participants should ‘mercilessly criticize’ each other’s suggestions during the Critique phase. In such circumstances it is easy to recognize the value of critical thinking skills.

**References**


https://philosophy.hku.hk › think › critical

https://upjourney.com/why-is-critical-thinking-important


https://www.criticalthinking.expert
Virág Suhajda

Cogito ergo sum – I think therefore I am, said Descartes. Although this statement is not really clear about the role of our body in our thinking, still Descartes is regarded as the father of “Cartesian” dualist thinking, splitting the body and the mind (see description in the Internet Encyclopedia of Philosophy, IEP, referenced below), and discarding the body’s role in thinking and learning.

However cognitive and neuroscientific research has already disproved the Cartesian theory. “The body keeps the score” says van der Kolk, famous trauma-researcher and therapist. Our emotions, cognition, and bodily functions make up a complete system where everything is influenced by everything else.

Therefore what happens with our body equals what happens to us and vice versa. Research already shows that already intrauterine (within womb) development does have an impact on the later emotional and cognitive responses of the person; for example if the mother was stressed, then the baby got a lot of stress hormones, making him/her more anxious later (Coussons-Read, 2013).

Learning is Adaptation

Our nervous system as well as our endocrine (hormonal) system are developed in adaptation to our environment (Johnson and Taylor, 2011). Learning is adaptation: we learn how to survive and develop in the environment that is given to us. Through this adaptation we develop different hormonal systems, cognitions and emotional systems, and that is how we develop into very different adults. No two people have the exact same environment. Even twins in the womb have different environments – one of them has the sibling on his/her left side, the other on the right side. Different movement opportunities in the womb, different interactions in later life.

When it comes to the nature or nurture debate about which is more important: our genes or our environment, there are interesting findings which suggest it is much more than “both”. What happens with us does change the way our genes operate, and therefore our genetics which will be inherited. This is called epigenetics, and it is not only one of the basic drives behind evolution, but is partly also a basic factor for transgenerational inheritance if we look at shorter time periods. For example the famine in Netherlands during World War II has affected not only the children of mothers who starved but also and their grandchildren: they show a greater incidence of obesity. The body learned that all calories must be utilized, and this “knowledge” was also stored in the genes (Ravelli, Stein, Suss, 1976).

When it comes to emotional development and well-being, the role of the environment is also crucial. We not only learn but internalize behaviour-templates from our environment. When we grow up in an abusive family, our body’s hormonal system will adapt to stress. In better (still tragic) cases the child’s response is the “fight or flight” reaction: increased heart rate and blood pressure, allowing running away or fighting. In even worse cases, when there is a high level of aggression and no way to escape, the reaction might be giving up, which is “freeze”: dissociation, weakness, dumbness, depression. The child’s body is thus calibrated by the environment, as well as her/his mind, cognition, emotions. The same can happen in adult life, but with a lower toll: recalibration is more simple than with childhood trauma (Johnson and Taylor, 2011).

Transformation through Embodied Learning

Cognitive or intellectual development is also rooted in the bodily experiences of the child. In the early ages the infant uses its sensorimotor abilities to gain and process information through interactions with the environment – just think of babies touching and tasting objects around them. Piaget (1936), a prominent researcher of cognitive development argued that sensorimotor abilities are essential aspects of learning. Although the debate is ongoing about the extent to which bodily experiences affect higher cognitive functions, evidence suggest that the connection exists: as shown by a longitudinal study (Dove, 2016), infants who had a higher level of motor-exploratory competence such as movement or balance had higher scores on intellectual and academic measures at the ages of 4, 10, and 14.
We have seen so far that the development of a child is always embodied (it happens within the body) and embedded (in its environment). But development doesn’t stop there – even though most of our mental and emotional patterns are established in childhood and adolescence, the ability to continually adapt to the changing environment and differentiate in the already existing “knowledge” is present in adulthood (Johnson and Taylor, 2011). We never stop learning. Yet it is often seen that people use the emotional and behavioural patterns that were adequate at one point in their life but seem to be unhelpful in their present (Perry, 2006).

• An infant who learns early in life that his/her needs are not met by the primary caregiver is learning not to trust others, and can become an adult who feels uncomfortable in intimate relationships; s/he becomes lonely while having a strong belief that other people are not “right”.

My PhD in cognitive science was about the system theory of learning, an approach that integrates the bodily and the environmental nature of learning. I have read and written a lot about this issue but it was not until I started to experience body-based practices (such as dance therapy or Body-Mind Centring) that I truly understood how our way of experiencing the world is deeply rooted in our bodies. Understanding an issue mentally and actually feeling it in my own body are completely different experiences - both are relevant and important in their own right. This is why I studied to become a Psychodynamic Dance and Movement Therapist and integrate body-based exercises in all my own trainings.

No matter whether we want to correct maladaptive patterns from our past or to reach a more and more complex understanding of the world, I believe we always have to take into account the embodied nature of learning. Failing to do so can hinder our efforts, as focusing on the development of only one aspect (most often it’s either the emotional or the cognitive) of the organism can have only limited effect. Considering all domains (physical and social environment, emotions, body and mind) on the other hand can lead to transformation – a substantial change in how we feel, understand and think about the world. Connecting to the body (through methods such as bodywork, authentic movement or focusing for instance), understanding what it has stored and how to release what needs to be released, can help us to see more clearly in our emotional and mental world as well. Being connected to the entirety of us helps us to live an authentic life.

References, further reading

About Descartes and the question of mind-body dualism: https://www.iep.utm.edu/descmind/


There is a remarkable gap in the literature regarding the role the body plays in transformative learning (TL). Jack Mezirow’s famous early definition of TL was centred around the notions of ‘habits of the mind’, and ‘frame of reference’. This definition has since been justly criticized by many for being too cognitive. One of the critics was Illeris Knud who in fact proposed a new definition: “The concept of transformative learning comprises all learning which implies changes in the identity of the learner.” (Illeris 2014 p.577)

In his paper he concludes that ‘identity’ is a suitable keyword for a new definition of TL because it “includes all dimensions of mental activity” (ibid. p.584).

Peculiarly, this reasoning goes precisely against the inclusion of the body in discussing TL, as the “mental” is historically inherently disembodied. Thus ironically, this definition by Knud fails to be substantially less cognitive than that of Mezirow’s.

Furthermore, in the recent second edition of the comprehensive book Contemporary Theories of Learning there is only a single page dedicated explicitly to the role of the body in learning in a subsection ‘Embodied or somatic knowing’, and only one chapter addresses the issue of affectivity (Illeris et al. 2019). There are a couple more studies discussing the role of the body in adult education, yet these works only marginally deal specifically with TL (Horst 2008, Lawrence 2012). To my knowledge, there is only one short study that addresses this exact topic (Schlatter 1994).

The situation becomes even more striking if we consider that the experience of transformative learning comprises all learning which implies changes in the identity of the learner.” (Inderis 2014 p.577)

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There is a long tradition in phenomenology - a philosophical school meticulously describing the structure of experience - that argues that our perceiving the world and indeed our very sense of self is fundamentally bodily (Merleau-Ponty 1945/2012). This is to say that our sense of self consists of bodily feelings and sensations which together constitute our experienced world, our reality.

Now, if we combine the proposal by Knud that transformative learning involves some change in the identity on the one hand, and the phenomenological insight on the other hand – that our identity, our sense of self is primarily bodily self - then we can start to describe the process of transformative learning in terms of changes in our primordial bodily affectivity: the ever changing ways we experience ourselves in our body and, with it, how the world appears to us.

One of the benefits of this proposed approach is the following. To me, and probably also to others, the idea of changing identity can seem like a daunting process. It can thus lead to intellectualizing the problem, thereby missing the whole point. However, when working with bodily feelings and sensations, we can break down the gradually unfolding process of TL into tiny steps of tangible affective changes and pinpoint the experiential microstructure of the transformation on this immediate bodily level. Thus the daunting process becomes a journey that is lived and affectively experienced step by step. I maintain that such micro shifts in bodily feelings and sensations, when put together, result in a change of identity, a shift in frame of reference, a transformative learning experience.

This process I am describing is called focusing. It is a well developed and elaborated phenomenologically influenced somato-psychotherapeutic method, proposed by psychotherapist and philosopher Eugene Gendlin (1981). Focusing is thus a method that can be used either in therapy or, once the necessary skills are acquired, in any situation in everyday life. It stems from the conviction that there is implicit knowledge in the body. A certain type of bodily sensations or bodily affectivity, Gendlin calls a ‘felt sense’.

Implications

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Let us take an example. When you think of someone in your life, your body responds to your thoughts. Say it’s your boss; there may be a certain sense of tension in the stomach, a sense of feeling small, yet at the same time a sense of excitement, a slight speeding up of the breathing. All these together are a felt sense, the body’s way of recalling knowledge and past experience. Cognitively, it would be hard to list it all, but the body knows it all, and Gendlin assures us we can trust this knowledge.

You can also try it: choose two people in your life who are close to you. Think of one for a minute, and just be with whatever feeling comes. Then switch and focus on the other person. The difference between the two experiences is the difference between your relationship with each of them.

Gendlin maintains that with all of our relationships, our felt senses change and can be changed, be it with a person, a memory, a situation, anything. In fact, once you name a felt sense, it changes in that very instant. It can be as simple as asking yourself how you are right now. You might start looking for words, tired, sleepy, down, sad, disappointed? None of them feels quite right. Melancholic? Yes, this is it, this feels correct. When you find the right word, you know you did. There is a certain sense of ease that comes with it. Gendlin calls it the bodily shift. What happens there? You check the words against a background, a background of your body knowing what there is. Once you find it, once you find the word that describes whatever calls for your attention in your body, that felt sense carries forward, it is no longer the same. You have changed, your bodily feeling has shifted, in other words, your relationship with that situation, person, or memory has changed.

Although I am not aware that the connection between transformative learning and the technique of focusing has been explicitly made, I am convinced that the approach of focusing provides a technique, a language that helps to unfold the fine-grained structure of a transformative learning process. In my view, any TL experience always involves changes in the bodily felt sense. Gendlin says he did not invent the process of focusing—wise people have always used it. All he did was to write down its steps so that it can now be explicitly taught. Focusing thus gives us a tool that helps to reveal the microstructure of a transformative experience.

Focusing is now used in a wide variety of practices, such as in so-called focusing-oriented psychotherapy, as well as any kind of therapy, workshop, or educational format that utilizes the knowledge of the body. In fact, any practice that works with feelings, verbalizing or symbolizing feelings is in one way or another focusing. However, learning the language of the focusing technique provides a more reflective and thus more efficient way of working with these processes. For in itself, gaining a better understanding of our bodily feelings does indeed transform us and change our identity.
While I am in no way a certified Focusing practitioner, working with teenagers as a tutor and teacher, I do consciously use some of the focusing steps Gendlin describes, and more importantly, the quality of attention or awareness focusing requires when being with others.

For instance, answering the apparently simple yet not obviously easy question 'how do you feel?' is at the core of focusing.

When teaching a notoriously feared and hated subject to teenagers – yes, maths – we work with two pens of different colours. A regular black or blue one that is used for the exercises – solve the equations, draw the triangles, so doing the maths. The other one, however, with a nice colour of their choice, serves a special purpose: to write down the feelings that they have next to the actual line where they feel it. The result is a purple 'feeling lost' next to an empty coordinate system, a purple 'anxious' next to a question 'In how many different ways can you arrange 8 figurines on a shelf?', or a purple 'relief' next to '−6+2k (k∈Z)'.

With this method, I find that the blurry and general 'I hate maths. I’m terrible at maths' turns into a more refined relationship with maths, precisely because the students develop a skill of recognising and individuating feelings towards specific parts of maths by connecting with their body while studying it.

In short, they learn about themselves through these exercises. By practising it they might find out that there are certain parts of maths they actually like. Or an unarticulated, hazy anxiety towards maths in general might transform into a self-reflective exercise where they go 'Okay, this is the part where I usually feel lost and start choking, I am familiar with this, I know I can be with this feeling.' Once someone can get to such a statement, these felt senses, the feeling lost or the heaviness in the chest to the point of choking, carry forward, and with them their relationship with the system changes. It will no longer elicit a feeling of disgust; after many incremental steps eventually their entire relationship with maths can alter: they will be able to sleep the night before an exam, they will be able to do their homework without a horrible stomach ache, and they might leave behind their identity 'I am terrible in maths' altogether. I call such a process transformative learning.

References

The International Focusing Institution: https://focusing.org/
There are tons of great tools and interventions out there for transformations and transformative learning, but the success of them depend - in my experience - on the mental state of the person applying these tools and the mental states of the relevant stakeholders. And even though we are all endlessly complex - to (over-) simplify things we can reduce our inner states to two poles: reactive versus creative.

Even though others might use different words, there are many people who have subsumed inner states into two poles. The Arbinger Institute (2009) talks about “being in the box” and “being outside the box” (Leadership from Within), Carol Dweck (2008) differentiates a Growth from a Fixed mindset, Argyris (2004) talked about learning versus protection. Part of being in a creative state also means feeling connected to others, being in touch with one’s own emotions, often taking oneself and life not too seriously. In this state we can focus on creating new transformative and creative solutions and we take ownership of our actions and feel accountable for our feelings. In a creative state we accept the past and current state of affairs as is, which does not mean we say “yes” to everything, it simply means acceptance in a psychological sense, meaning we accept that we cannot change things that have already happened. This actually gets us more into a solution-oriented mindset than staying in resistance to what is. A growth mindset also is part of the creative state, meaning we believe people can adapt and develop. There is a sense of mastery and flow combined with an awareness and consciousness of who and how we are.

The reactive state is one in which we might feel defensive, protective, often we have a tunnel-vision, feel fear or anger, we see ourselves as a victim or we feel like attacking others. Also, it is a state in which we can shut off mentally and no longer listen, nor do we feel connected with those around us.

On the other hand, the reactive state is one in which we might feel defensive, protective, often we have a tunnel-vision, feel fear or anger, we see ourselves as a victim or we feel like attacking others. Also, it is a state in which we can shut off mentally and no longer listen, nor do we feel connected with those around us.

The reactive state has a neurobiological correspondence: If we feel threatened, the amygdala - a part of our brain - triggers a fight, flight or freeze response which enables fast responses but often knee-jerk responses (Goleman, 1998). Often when we are in a reactive state, we do not realize that we are in one, our resistance kicks in and protects our egos.

**REACTIVE**
- Judgement, resistance, self-righteousness (“I know better”, “everyone else is an idiot”)
- Protection, fear, doubt (“I fear the worst”)
- Rage, anger, attack (“I will show you why you are wrong”)
- Problem orientation, tunnel vision, control, blaming attitude (“whose fault is it”)  
- Isolation and retreat, victim mindset (“no one understands me”)

**CREATIVE**
- Learning, openness, curiosity, observation (“learners mind”, “I do not take myself too seriously”)
- Acceptance, appreciation, (self-) confidence (“it will work out”)
- Understanding, compassion, liveliness, collaboration (“let me understand”)
- Solution-orientation, broad perspective, accountability (“what can I change to improve”)
- Connection with others, accountability, mastery, vulnerability (“I am part of a bigger whole”)
So what do we do with these two states? The point here is not that we aim to never again get into a reactive state. It happens many times a day no matter what we do. The point is to become more aware of our inner state, realize sooner that we are in a reactive state. And also get faster out of a reactive state into a creative state.

Being in a reactive state does not necessarily mean being nasty, nor does being in a creative state equate with being nice. Quite the opposite for harmony-addicted people - like myself. Through working with the two states and reflecting on them and various therapies I have learned to become more honest - even if this means I create conflict. But I do this from a creative state (and I try to stay in the creative state even when others get into a reactive state).

I believe that for any TL facilitator it is helpful (maybe even imperative) to become aware of one’s own state and either stay in a creative state or get quickly back into it even in a challenging environment. In a creative state so-called “difficult” learners or “difficult” situations become fascinating learning opportunities for facilitators.

This awareness not only helps the TL facilitator, it might also be helpful for the Learner to become aware of their own state while learning because we are only able to learn while we are in a creative state. So, in transformative workshops I often do a 45 minute session in which I co-create on two flipcharts what a reactive and then what a creative state is with participants, and then reflect on what they can do to stay in a creative state or get faster back into one. This makes participants more aware and helps to keep them longer in a creative learning state.

One of my favourite stories about the reactive versus creative state happened in a transformation workshop with the senior leadership team of one of the biggest Dutch companies. The most senior leader in the room, a CFO with his team, was very proud of being a very rational and logical and smart person. I had suggested that in the workshop we do a session on inner states (as described above) but the CFO said they had too little time for that nonsense and we should dive right into the content.

However, part of the workshop was designed for his team members to give each other (including the CFO) feedback on their behaviour, one-on-one. Besides some appreciative comments, the CFO also heard quite a bit of criticism which was new to him. This led him to get into a reactive state and later during the workshop he exploded when I used the word “emotion” in such a “rational” team and he screamed at the top of his lungs loudly “Nils, we are not an emotional company!!!”. Afterwards, there was silence in the room for what felt like minutes - even though it was probably only seconds. Then, the CFO became aware of what had happened and he said slightly embarrassed, slightly trying to smile “mmh, guess that was quite emotional” and in the following coffee break he asked me whether I could support him in working on his states, emotions and whether in the next workshop we could work on emotions in leadership. That was quite transformational ;-). I learned from that that sometimes I can trust the process more and do not have to push topics that are important to me (e.g. “emotions”) down my participants’ throats.

Dynamic

My own Transformative Edge

References


You can also freely download some graphics (also in German) from www.kulturwandel-in-organisationen.de


The other side of the ‘self-knowledge’ coin is the collective and professional skill of working with groups to support their transformation.

One aspect is philosophical: what values drive our work with individuals and groups? What is the worldview that drives us? When working for transformation, certain elements can be identified, rooted in the concept of the facilitator whose role is akin to that of a midwife: helping to birth that which is waiting to be born. The transformative process, to avoid the pitfalls of manipulation, needs to be deeply democratic.

A key subset of relevant theory is thus concerned with group empowerment or agency. Another aspect is instrumental, addressing the mechanism of societal transformation.
Well-structured social and collaborative learning allows stakeholders to identify pathways to common decision-making in situations of great uncertainty, complexity, anxiety, ambiguity, ethics and moral dilemmas, and to arrive at actions and behaviours effectuating the decisions. Through systematic processes of observation, exploration, experimentation, reflection and reflexivity the learners actively examine the assumptions, mind-sets and the mental and economic mechanisms that perpetuate or worsen unsustainable behavioural patterns and unsustainable societal arrangements. At the same time, the learning processes allow participants to create alternative or new behavioural patterns and societal arrangements that open perspectives to greater environmental, social and economic justice. Thus, social and collaborative learning can be individually and collectively transformative, i.e. supporting learners to become capable and empowered actors in change and transformation processes.

In one sense, all learning is social: “(…) all meaningful learning is inter-relational (with others, including other species, with place, and indeed with oneself) and requires some level of reflexivity by mirroring the significance of one's encounters with the inner sediments (frames, values, perspectives and worldviews) of prior experiences. The result tends to be a process of further solidification (freezing) or a loosening (unfreezing) or a modification (re-framing) or even the parallel occurrence of all three” (Wals, 2012).

In this sense, also transformative learning can be described as social learning. It happens in interaction with oneself and with others. It places a premium on reflection and reflexivity vis-à-vis assumptions and experiences underlying one's own behaviour and the behaviour of others. And, it results in transformation: the active opening to and the embracing of new perspectives and inputs, and therefore new behaviour(s).

While all learning in any context, whether home, school, work place or life in general, is social or interrelational, social learning as a theoretical concept and not as a mere descriptor is more specific. Social learning proper is central to at least two distinct traditions or domains:
(a) the domain of learning theory and developmental psychology, and
(b) the domain of natural resource management and environmental or sustainability education.
In developmental psychology it is understood that a growing child is continuously learning about its surrounding material, social and cultural world, using all its senses. For the child or learner, social learning is the continuous reciprocal interaction between cognitive, behavioural and environmental influences. According to Bandura (1977), the child’s (or learner’s) aural, visual and even olfactory observation of the actual behaviour of significant others (the ‘models’), whether parents, caregivers, teachers or peers, is the major source of developmental learning. By processing this observation, the learner learns new behaviour. Social learning happens through active appropriating of what is being observed. This includes assimilation, resistance, adaptation and modification. Social learning does not happen as the mere response to reinforcing stimuli, as the behaviourists theorized (e.g. Skinner, 1965).

There are at least three connections between this notion of social learning and the notion of transformative learning. First, both concepts are attempting to do the same. They help describing and understanding what happens in and as the result of a learning process. Bandura based his social learning on the ‘active modelling’ by the learners (children and adolescents). Mezirow based his theory on the transformative learning moment experienced by female adult learners who were preparing for re-entering the job market, when challenged to examine assumptions about their own behaviour. In both instances, the resulting (transformed) behaviour emanates from an active process of observation and reflection.

The second connection between the two concepts is the connection of chronological or evolutionary succession: transformative learning comes after social learning. Mezirow’s adults were challenged to take a critical look at their behaviour that to a large extent was shaped by the social learning in their younger years. The third connection is formed by the emphasis placed on the agency of the learners, i.e. their capability of making choices. Because younger people and adults have different ages, belong to different times and live in different contexts, they are likely to differ in the nature and scope of their agency, and therefore in the extent to which they can identify pathways for further (personal) development that deviate from or even transgress established patterns of behaviour and thinking.

In the early 2000s, theories in the domain of environment and ecology started to conceptualize social learning as a process of social change in which people learn from each other in ways that can benefit wider social-ecological systems. Originating from concepts of organisational learning (Agyris and Schön, 1978), this school of thought is informed by social theories of learning, which define learning as active social participation in the practices of a community (Wenger, 1998). They emphasize the dynamic interaction between people and the environment in the construction of meaning and identity (Muro and Jeffrey, 2008).

In line with this tradition, environmental education and education for sustainable development (ESD) have adopted social learning both as a tool and an outcome of a process of learning in the context of the environment and sustainability. Wals et al (2009) suggest that “social learning is a process in which people are stimulated to reflect upon implicit assumptions and frames of reference, in order to engage in a creative quest for answers to questions for which no ready-made solutions are available.” The absence of ready-made solutions is particularly obvious in the case of ‘sustainability’ issues such as climate change, resource depletion, and social and economic injustice. By their nature these are so complex (or ‘wicked’) that they defy easy, straightforward and simply technical solutions. (For a further take on ‘wicked problems’, see the section on collaborative learning below).

Echoing the essence of Mezirow’s transformative learning, Wals et al (2009) suggest that “social learning is a process in which various backgrounds and with different values, perspectives, knowledge and experiences, both from inside and outside the group or organisation, in order to engage in a creative quest for answers to questions for which no ready-made solutions are available.” The absence of ready-made solutions is particularly obvious in the case of ‘sustainability’ issues such as climate change, resource depletion, and social and economic injustice. By their nature these are so complex (or ‘wicked’) that they defy easy, straightforward and simply technical solutions. (For a further take on ‘wicked problems’, see the section on collaborative learning below).

In terms of outlook and in terms of method, social learning has much in common with transformative social learning. This is illustrated by the following list of social learning’s most important characteristics (Wals et al, 2009):

- It is about learning from each other, together
- It is assumed that we can learn more from each other if we do not all think alike or act alike, in other words: we learn more in heterogeneous groups than we do in homogeneous groups
- It is about creating trust and social cohesion, precisely in order to become more accepting and to make use of the different ways in which people view the world
- It is about creating ‘ownership’ with respect to both the learning process and the solutions that are found, which increases the chance that things will actually take place
- It is about collective meaning making and sense making.
When faced with ‘wicked’ social, economic and environmental issues, collaborative learning or deliberative social learning “allow(s) the various parties and stakeholders involved to recognize the facts of a complex situation, to appreciate the sense and meaning that the different parties attach to these facts in their complexity, and, to allow commonalities and, therefore, potentially common approaches and possible solutions as the issues at hand emerge” (Wals & Lenglet, 2015).

Collaborative learning extends social and experiential learning into the realm of societal organization. By explicitly bringing together a diversity of stakeholders, often with opposing interests and agendas, it is immediately linked to socio-political structures, behavioural patterns and dynamics on the ground. By examining and questioning assumptions underlying the behaviour and opinions of the different groups, it is likely to disrupt the status quo. Collaborative learning allows ‘new’ knowledge and understanding to emerge and become actionable in and through actual interaction, competition, struggle and collaboration. In this sense, collaborative learning fits in with the traditions and perspectives of ‘pedagogy of the oppressed’ (Freire, 1970) and ‘deliberative dialogue’ (Habermas, 1984).

For collaborative learning to be successful, some of the following conditions need to be met:

• All participating stakeholders are ready and willing to engage in a conversation about an issue, problem or problématique that is of common concern, to explore what it is and what it means, and how it can be addressed.
• It is valued by the participants. They expect their investment in the process – in terms of time, money, effort, political capital, etc. – to produce beneficial experiences and outcomes, especially in the longer term. They recognize the legitimacy of the convener and facilitator.
• It is structured in such a way that it offers a safe space, both physically and socially; participants can express themselves without attribution or retribution, and learn to do so in a non-adversarial and non-confrontational manner.
• It encourages participants to actively learn about, listen, explore and understand the diversity of their opinions, interests and concerns. They range widely outside their own familiar territory and frameworks.

Social learning, transformative learning and collaborative learning are branches and offshoots of the same ‘learning tree’. The three concepts, each in their own way, share the notion that individual and collective learning and associated behaviour happen in a context of time, place and interaction. They recognize that observation, experience, reflection and reflexivity are central to the learning process. Change and transformation in behaviour or action, whether individual or collective, inevitably emerge from the learning process.
In 2010-11, a multi-stakeholder collaborative and social learning exercise took place in the city of Ahmedabad. A well-regarded NGO invited a diversity of stakeholder representatives to address the sustainability issue of improving and managing the many deteriorating lakes spread around the city.

A conventional approach could have been to restrict the growth of precarious dwellings next to the lake, and even remove the inhabitants of such dwellings, to clean the lake and to create a city park. Instead, an unconventional process was started to arrive at a legitimate and longer-lasting solution that would do justice to planet (ecosystem services, water management and water quality), people (social inclusion and the quality of habitat and health) and prosperity (improved livelihoods).

After a first round of appreciation of the perspectives and interpretations that the various parties - including representatives of city planners, NGOs and a university - brought to the table, the newly formed multi-stakeholder team defined the main question guiding their inquiry: “Working together, how can we improve quality of life in informal settlements around water bodies and ponds in Ahmedabad?”

Next, during a 12-month period, the team participated in a series of local and international meetings and workshops (which were not without controversy and conflict) to agree on a common conceptual plan. The significant outcome was a decision that informal settlers would not be evicted even though the lakes would be physically restored. In fact, the proposal was for surrounding communities to be included in the maintenance of the area, thereby creating a sense of ownership of the lake and its surroundings, and developing livelihood opportunities. The relevant local government made budgetary provisions for the redevelopment, and tenders were issued in respect of the restoration of the water body.

–Based on research by Bharti and Bansal, 2012

References


American humanistic psychotherapist Carl Rogers was the founder of the person-centered approach in the helping professions. He believed in people’s own actualizing tendency, that is, an organic and inherent motivation to grow as a person. He developed his approach in therapeutic settings, but it has been found wide use in other spheres involving human relations - for instance in education.

Famously, Rogers pinpointed three conditions that, if all are met in the therapist’s attitude, create a so-called growth-promoting environment in which the client can safely develop into what he calls a fully-functioning person (Rogers 1979, 1989 chapter 9).

1. Genuineness or congruence. It is the alignment of behaviour and feelings, a truthfulness towards ourselves, a transparency of the person.
2. Unconditional positive regard. Rogers’s Person-Centred Approach
3. Empathic listening. The third might sound like the most mundane—everybody listens!—yet if there is one word that is associated with Roger’s legacy, it would probably be empathy (Rogers 1975). It was essentially he who introduced this kind of active, deep and meaningful listening to psychotherapy. Empathic listening, or empathic understanding for that matter, requires a special quality of attention from the therapist that is open and highly sensitive. Rogers maintains that if these conditions are present in a therapist, it brings about a growth-promoting environment in which the client feels safe enough to blossom and accept themselves. These conditions apply not only to the therapist-client relationship, but to any human relationship, be it facilitator and group, parent and child, teacher and student. Indeed, Rogers himself applied his person-centered approach in educational settings, taking this attitude into the classroom (Rogers & Freiberg 1994). In fact—and I believe this is especially important in this volume—he specifically said that the main aims of education and psychotherapy are one and the same: to facilitate people to accept and find themselves and help them become fully-functioning persons. It is in this spirit that he talks about significant learning, the cornerstone moments in both therapy and education. Significant learning is that “which makes a difference—in the individual’s behavior, in the course of action he chooses in the future, in his attitudes and in his personality.” (Rogers 1989) He says that in both therapy and education, significant learning takes place only with an additional condition to the above three. This is the condition if the client or learner perceives themselves as faced by a serious and meaningful problem, if the learner is personally involved, if the problem is relevant for them.

Is Rogers’s concept of significant learning similar to the concept of transformative learning? Illeris gives an affirmative answer to this question, specifically comparing it to Mezirow’s concept of TL (Illeris, 2014). He even notes, referring to Rogers’s significant learning, that “it is interesting that the first academic initiative in the field was explicitly defined by the use of ‘the self’” (ibid, page 576), as according to him, Rogers at one point defines significant learning as the changes in the organisation of the self, which wasn’t the case with Mezirow’s proposal of TL. Where I find that the two concepts differ is that while Mezirow and Kegan talk about grandiose epistemological shifts during TL, Rogers’s approach sounds more permissive, more inclusive in a way that even a fleeting moment during a discussion when one is being empathically understood by another—or by oneself for that matter—can have the power of changing the organisation of the self. In other words, significant learning may happen in small increments rather than in one big moment of realisation and transformation. The fine details of what happens in the experience in such a moment are discussed in this volume in the chapter Focusing.
One day a woman called me to tutor her 15-year-old son in English as a second language and added that he had already worked with several English tutors, all of them failing to make any progress. I took up the challenge suspecting this was not going to be about teaching him English at all, but something deeper, more personal. On our first meeting after his mother had left, the boy, barely looking into my eyes, opened the conversation. On the verge of being extremely firm and aggressively defensive, he plainly stated in our mother tongue, Hungarian, ‘You will not be able to teach me a word of English and I will not say a word in English.’ As he was saying it, his face went rather vicious and dark, a kind of darkness that comes from somewhere incredibly deep within him. He must have expected resistance. This is what he was used to. Indeed, he seemed quite familiar in the situation, he was in control—I was thinking of all the other ‘failed tutors’, who might have insisted on teaching him English after such an initial encounter. After a moment of feeling a slight rush of panic, I could sense how the situation turned upside-down in me. So going in the opposite direction of what I imagined his expectations might have been, I agreed with him: no English whatsoever! And accepted him with his hatred and deep disgust of the English language. He was taken aback by this and I could tell my reaction put him in unfamiliar territory. I started asking him, in Hungarian, about why he is here and how he would like to spend our time together, trying to genuinely understand his answers. At one point I said I would not take back the control about studying or not, the power that he had immediately grabbed in the beginning. By the end of our first meeting, we had established a verbal agreement according to which I would never ever initiate, let alone insist on, anything related to studying English in our meetings. It took us almost two hours to arrive at understanding both the freedom our agreement had given him and—maybe more importantly—the responsibility that came with it. I offered him no surface to resist against, which beautifully opened up the door for me to be able to access him without becoming defensive. At the next couple of meetings he showed no intention to learn English. I think he was experiencing his newly acquired freedom, in which we could develop trust in each other and he could free himself. We were talking in Hungarian about whatever topic he would bring. He clearly enjoyed these sessions and my company. Only, I continued to ask him at each session why he was there, in order to stay reflective about his decision both of coming to me and of not studying English with me. Why does he not spend these afternoons with his peers, or wandering about the city, or anything else? After three months he asked me to give him an English writing exercise, and after another three months he said his first sentence in English as if this was the most natural and habitual thing in the world between us. That dark, vicious face the English language had elicited in him was long gone. His English might not have improved much, but his attitude towards English had indeed greatly changed. He does not despise English anymore, in fact, he would enthusiastically send me links to TED talks in English that he wanted to talk about. And importantly, he has always liked coming to our classes where he found acceptance and empathy towards him regardless of what he was doing or saying. I can confidently call this boy’s journey a transformative learning experience, which in fact was facilitated by applying the values of the person-centred approach.

References
Over a long and productive period of more than 70 years, Jürgen Habermas (born 1929) has formulated and re-formulated his ideas about communicative action, deliberative democracy, discourse and dialogue. His concepts and arguments have served as support, counterpoint, background and echo for authors theorizing about transformative learning and learning for change. Mezirow (2015) has acknowledged Habermas’ influence on his own thinking, while also recognizing his debt to Paolo Freire (1972). But he does not make an explicit connection between the two. There are, however, strong similarities between Habermas’s and Freire’s notions and arguments. They “share crucial views on science, society, critical social psychology, and educational praxis that are mutually illuminating and offer a new point of departure for a critical theory of education” (Morrow & Torres, 2002).

Fleming (2014), who has expanded Mezirow’s understanding of transformative learning, recognizes Habermas’ critical theory as one of transformative learning’s foundations, next to the humanistic tradition, which, by the way, is also strongly represented in Freirean thought. Habermas’s categories and frameworks retain their pertinence for understanding the nature of ‘communicative action’ required for dealing with existential crises and ‘wicked problems’. A recent article about how Habermas’ concepts can inform climate action is an illustration thereof (Prattico, 2019).

In his book The Theory of Communicative Action, Habermas (1985) explored the concept of ‘communicative rationality’. It allows people to achieve mutual understanding by engaging in dialogue without being controlled by violence or oppression. Consensus formation – overcoming differences and conflicting ideas and opinions – emerges from communication that is free from coercion and domination. For consensus to appear, the persons engaged must establish intersubjectivity. They need to at least suspend if not entirely put in question or abandon their own prejudices and preconceived ideas, while ‘recognizing’ each other. In Habermas’ (2004) own words: “[…] moral discourse allows all those concerned and affected an equal say and expects each participant to adopt the perspectives of the others when deliberating what is in the equal interest of all. In this way, the parties to the discourse learn to mutually incorporate the interpretations others have of their self and of their world into their own, expanded self- and world-understanding.”

In this perspective, deliberative communication and dialogue are necessarily transformational, both individually and socially, i.e. relationships with other individuals and groups. It should be noted that ‘recognition’ and ‘reciprocity’ are also central to the work of Axel Honneth (2007), who is Habermas’s successor at the University of Frankfurt.
As part of his theory of communicative action, Habermas examines the ways in which people shape their social relations. Different types of ‘discourse’ and ‘reason’ determine how society, and particularly democracy, function. While speech and language are essential in the exchange of ideas or dialogue, they are necessarily accompanied, complemented and reinforced by deep learning (critical reflection) and ‘acting on the world’.

For this to happen “people need some sense of success and supportive community to engage in processes of social action”, according to Cain (2007), referring to Shor & Freire (1987). Therefore, “an adequate theory of transformative learning in social movements will address the external or social, economic, and political contexts in which people learn about social injustices and how the power relations of those contexts shape learning. Additionally, an adequate theory will include the ways in which the context of social movement organisations themselves can support transformative learning and participation in movements for social change, or thwart such learning and participation” (Cain, 2007:75).

Further, as argued by Schugurensky (2002: 62), in the absence of a supportive social environment or a social reality that is susceptible of transformation or a sense of community, ‘critical reflection alone is not only unlikely to lead to transformative social action, but in some cases it may even lead to the opposite situation, which is cynicism, paralysis, and a general feeling of helplessness.”

Social Relations in Context

Deliberative Communication and Appreciative Inquiry

The concept and practice of dialogue as a method of transformative learning is central not only for Habermas but also for the Appreciative Inquiry (AI) approach: see the chapter on AI. AI and Habermas accept that social systems or relationships are changed or transformed in the actual act of inquiry, dialogue, learning and communication, at the individual and at the collective level.

Fifty years ago I was a student of communications, especially mass media communications. I then read Habermas’s book Strukturwandel der Öffentlichkeit, in English The Structural Transformation of the Public Sphere: An Inquiry into a Category of Bourgeois Society (Habermas, 1989). It provided (and still provides) a fascinating historical analysis of the evolution of political and societal discourse from the late 17th century until the arrival and dominance of privately-owned media such as newspapers, radio and television. Habermas shows that a ‘public opinion’ emerged from a free and open public space (both physically and symbolically). This allowed society (primarily but not exclusively defined as ‘the bourgeoisie’) to arrive at ‘self-enlightenment’ and ‘self-understanding’. The media, such as pamphlets and newspapers, were the means in this transformation. Later developments in the ownership and technology of these media allowed the concepts and practices of ‘gatekeepers’, ‘opinion leaders’ and ‘public relations’ to take hold.

Over the years, Habermas’s historical perspective and categories have served me well. When and where confronted with conditions that call for change and transformation, it is essential to recall that individuals and groups of people are not just victims of their circumstances but also reflexive agents who affect and transform these circumstances, and therefore their ‘destiny’. As a corollary, society, i.e. the social, economic, political and cultural arrangements governing human interactions, is never stagnant. It is a continuous work in progress. Given their different and opposing interests (and associated self-understanding), this work in progress can be viewed as a continuous dialogue or discourse between individuals and collectivities. For the dialogue to be eventually productive it must be based on attitudes and behaviour of mutual recognition and reciprocity.
These notions have strongly influenced my orientation and approach when working with different groups of people in different contexts: illiterate adults in TV-based out-of-school education in Cote d’Ivoire (1970s); small farmers in Zambia’s Training & Visit scheme (1970s and 1980s); school principals and educational administrators in Botswana (1980s); managers and instructors of African management education institutions (1990s); labour & employment training with representatives of governments, trade unions and employers worldwide (1990s and 2000s); operationalizing and expanding education for sustainable development with policy makers, practitioners and researchers in a variety of countries (2000s and 2010s); and ‘citizens assemblies’ for a sustainable future in Uppsala (2020s).

My orientation and approach can be summarized as: respect for each person’s agency; recognition of each person’s individual and collective history and self-understanding; while creating conditions for a real dialogue to occur and consensus to emerge.

Different Contexts

References


See also the chapters on Appreciative Inquiry and on Social Learning and Transformative Learning in this book.
Process Work

Elena Rodriguez Blanco and Beatriz Gallego

Seeing conflict as an opportunity for change, Process Oriented Psychology, or Process Work, was developed by Arnold and Amy Mindell and their colleagues. They saw the need for a holistic approach to psychology. Process Work is used for understanding and influencing interhuman relationships for example at eco-villages like Findhorn to manage people, relationships, co-living and a training lab. It is used by coaches, psychologists, facilitators, professors, businesses, HR, marketing, entrepreneurs, and more.

Process Work is a combination of Jungian Psychology, Systems and Physics Theory, Communication/Roles/Field Dynamics, Taoism and Shamanism. It is designed for diverse processes dealing with social, environmental and political issues, conflict resolution, violence prevention and community building. It works by developing facilitation skills of the participants through a comprehensive theory and method to work with individuals, relationships, organisations and communities.

Three Layers

Process Work builds on an understanding of three different layers, or levels of reality:

Consensual Reality: includes measurable “agreed-on” concepts, roles and responsibilities and ranks and power.

Dreaming Level: includes underlying information, double signals, ghost roles, levels of communication, subtle feelings, dream field of unconscious and marginalised information.

Essence Level: looks at inspiration and passion, underpinning motivational levels, a sense of unity and oneness and Earth intelligence.

This method supports the awareness of oneself and others. Such awareness helps in the development of intro, inter and systemic levels of interaction. Arnold Mindell developed a framework for encouraging participants to identify with unconscious experience through a process he called ‘unfolding’, a deconstruction of the experiences that relies on communication as well as movement, deep somatic experience, interpersonal relationship, and social context.
Transformative Edge

Every person, relationship, team or organisation struggles with conflict due to our personal experiences, primary processes and marginalised aspects of ourselves, society, and the environment. Embracing our personal and systemic diversity is needed for building collaboration, deep democracy and resilience at all levels.

Neglected conflict goes underground in every process or situation and pops up in such forms as revenge, violence, oppression, jealousy, apathy, depression…

The basic methodology involves different learnings and, for the facilitator, the practice of:

- The development of the self as a participant-facilitator of all processes in a multi level from the inner self and relationships to group and system dynamics.
- The use of dual awareness: the first awareness focuses on the group and its self-organizing tendencies and a second focuses on a deeper, more personal experience, sensations, atmospheres, ghosts, body signals…

An attitude of inclusiveness to co-create group cohesion where diversity matters for a Deep Democracy level (system-level) of participation and awareness.

Experimenting with roles and archetypes, switching roles and ghost roles; e.g. leader, teacher, artist, jester/fool, big king, big mother, warrior, hunter.

Facilitating hotspots (moments of high energy) and cool spots (moments of temporary resolutions).

Sensing and preventing situations of conflict through communication channels and signals.

Working with meta abilities of your own personal style of facilitation.

The “Edge” in Process Work

Dr Stephen Schuitevoerder writes:

“The place where one transitions from a familiar experience into a less familiar experience is called the edge. The edge divides our experience into separate identities. The more familiar identity is called the primary identity, and the less familiar and potentially emerging identity is called the secondary identity. The edge is the barrier between these two identities.”

“At the edge reside many beliefs, values and judgements which act in support of the primary identity, preventing a fluid transition into new and unknown experiences. These attributes are called the edge figures and are responsible for limiting our range of expression and holding us in states from which it is difficult to emerge. Following the flow of expression from moment to moment requires the ability to be fluid between those states which are primary and those which are secondary for us.”
“One thing I love about Process Work is that it helps to bring forth the unspoken. Many times I have felt intuitive mistrust of someone, when what is really happening is that the person is sending double signals: their body language and facial expressions are communicating one thing and their language and voice are saying another. This at the subconscious level creates an “alert” that someone is perhaps not telling the truth, and through process work I was able to understand that it is a misalignment and through several questions to find alignment and understand what in the message was unclear.

Working through all the roles in different facets of life, and the “rank” of power and leadership that are assigned to each, enables resolution of a different kind of ambiguity. The more power, the higher the level of service; and the greater the consciousness, the higher the level of service.

So for example in a conflict the person with the responsibility to bring it up is the one with the highest rank. However this refers not only to consensual reality, but also to the psychological and essence levels. Let’s say an employee has a discussion with the boss and there is a conflict. The boss might have the higher rank in consensual reality; but if the employee has a higher rank in their emotional intelligence and essential reality, it is they who need to bring up the conflict. That was super interesting for me to find and to work through understanding the responsibilities.

Process Work also helped me manage Communication and interaction styles at all levels: consensus reality level, psychological/dream level and essence level. This work is crucial for understanding systems and how they interact with each other. While there might in the consensual reality exist a specific “power play”, the dream and essence levels use other levers to mobilise the system. In a facilitation in Tuzla, Bosnia, I was able to facilitate war survivors through the pain, back to their essence level, to recover the power of surviving and mobilising their story from one of victims to one of heroes. This was done with a group of high school teachers who in turn have gone on to similarly inspire students.

My experience can be summarized in four themes:

- Learning how the group works as a field. How we play different roles in different fields, observing the ghost roles of the field, practicing role switching to understand other points of view.
- Being aware of my position in the aspects of privilege, rank and power. Observing the signals and double signals of rank, attitudes and effects. Getting insights into blind areas; considering what is that I don’t recognize as my privilege? What is my power? How do I use my power?
- Sharing and going deeper into feelings, emotions, body signals and meta communication through the different levels: measurable reality, dreamland, personal psychology and experiences, non dual essence of awareness.
- Deep Democracy – concepts and practice of the connection brought by deep democracy processes where all voices, feelings and roles are welcomed. The team and organisation will achieve a bigger understanding of processes and systems dynamics for sustainability.

A characteristic of Process Work is its ability to create a peaceful and active listening space deeply facilitated. In Spain we have used this feature of Deep Democracy to give voices to different “conflicts” around the immigration and refugee “crisis”. It allowed participants to listen to different opinions and thoughts without the need to defend, support, or feel attacked.
Envisioning

The ability to envision one or more desired futures is an essential component of transformative learning. Various models assist the disentanglement of hopes from fears, expectations, and assumptions.
About 20 years ago, my husband Boris and I were full of idealism and ambition to contribute to a more humane, loving and sustainable society. We met many people who could tell us what goes wrong in the world and what they didn’t want, but we were shocked that most of them didn’t know what they wanted instead and how little imagination they had about what a better future could look like. We decided to create a space where we can nurture this imagination and help materialize it, Visionautik Akademie. Since then we have facilitated many social entrepreneurs, visionaries and innovation teams in their process of bringing their visions to life.

Our own longing and vision of a Visionautik culture gave us the motivation and stamina and willingness to learn and develop in order to bring this academy to life despite all obstacles and setbacks. I can tell from my own career that envisioning is one of the most powerful core competences to boost transformative processes.

Kissed by the Muse Model
How to Find One’s own Path towards an Emerging Future

Jutta Goldammer
The Power of Desirable Futures

Visionautik is the art of envisioning and navigating towards a desirable future. Navigation means for me a high competence in orientation skills. There are two ways to navigate somewhere:

One way is to follow clear instructions, recipe style. Someone who knows the way tells you which path to follow, when to turn left and when to cross a bridge. The problem with this approach is that you can only get to places where someone else has already been. In our times of social, ecological, economic and spiritual challenges that call for new solutions, treading the same old paths someone has laid out for us is no longer enough.

This is where the second way to navigate comes into play. It is about understanding principles of travelling. This means you learn how to read a map, understand a compass, steer a vehicle, and know how to distinguish and deal with different landscape types. There is so much to explore when you are not condemned to stay on motorways or to clutch official tourist guides. This allows you to follow your own path, take your own decisions and discover new areas where no-one has been before.

As I am so excited about the joy and aliveness I feel myself when I explore unknown territory, I see it as my mission as a facilitator to empower people to use their own maps and follow their own ways. This is what I also want to encourage in this article. Instead of showing you directions of a known path I have travelled – a certain method which you can follow – I’d like to introduce some basic principles that help you create your own facilitation methods, your own vehicles or your travel routes which are customized for the groups of adventurers you are facilitating.
Steering Planes towards an Emerging Future

I love Otto Scharmer’s image that we need to “build landing strips for the future”. Thus we allow a non-determined future to emerge and create solutions for our current challenges on a different level than where they were caused. I know that we Berliners have lost any trustworthiness regarding building airports or landing strips, so I’d better focus on the flight itself: How to navigate groups to bring a desired future into the present. I invite you to an imaginary flight. And of course I will not show you the flight route you have to take, but instead I will give you some insights into the cockpit of an ideation airplane with its most important navigation tools, buttons and switches. At the end of this article you will know how to navigate your own ideation airplane and safely land your envisioned future, using existing facilitation methods or those you developed yourself.

First of all I’ll show you an archetypal flight path of an ideation process. Already in the 1920s the social psychologist Graham Wallace put together a systematic theory of the creative thinking process based on observations of creative people. In its essence it is a model with four phases: Preparation, Incubation, Illumination, and Verification.

Preparation
Understanding the situation, defining the challenge, gathering information, posing a core question.

Incubation
The term originally describes the process of sitting on eggs to hatch them. From the outside nothing seems to happen. The bird apparently passively sits on the egg and the egg looks just the same as before. But the inside of the egg is buzzing with activity and transformation. In a materialistic society’s mindset it is a special challenge to hold that tension between the anticipation of something new about to emerge and the absence of any visible signs of success. Incubation from a goal oriented perspective often does not feel very comfortable. The challenge of this phase as a facilitator is spreading confidence and believing in the moment of the idea ‘hatching’ in time - be it in minutes, days, years or decades. This helps to savour the process itself, with playfulness and experimental spirit.

Illumination
Sometimes it is described as a Eureka-moment or epiphany. This comes suddenly and unpredictably, often in relaxation, but also in conversations with other people. Illumination spreads some kind of magic. Nevertheless it often does not show up with great fanfare, but can pull together many tiny Aha-moments as described by Steven Johnson, who calls this phenomenon “the slow hunch”.

Verification
Prototyping and testing the idea, finding out if the new idea fulfils its requirements, solves the initial problem and serves its purpose.

There are three basic flight rules you need to know:

- You all know the first rule: Fasten seatbelts. No matter if you facilitate an innovation team, a group of activists or a company in a change process, individuals engage themselves more deeply when they feel safe. Make sure every passenger you take on your ideation journey feels safe and welcome as a person and that also all their ideas are welcome. Then the ideas can take off.
- Separate the phases. You need to consider different things when you are taxiing or taking off or flying or landing. One thing that might be absolutely essential in one phase can be a death blow for your idea or for the creativity of your team in the next phase. So especially separating generating ideas from evaluating the ideas is really important, so the ideas can come to life before they have to be killed again.
- Record your ideas. Make sure you get them out of your heads, so you don’t need to worry about forgetting them. Use post-its, paper, flipchart, napkins or whatever is available. Draw pictures, journal, just get the ideas out of your head. Also this helps you in the communication process, if you do your ideation in collaboration with others.
The Switches in the Cockpit of the Innovation Airplane

Let’s go into the cockpit and I will show you some important switches:

- Opening - Closing
- Searching - Being found for an idea
- Order - Chaos
- Scarcity - Abundance

Opening and Closing

Often it is also called divergent and convergent thinking. Divergent thinking is about opening up, generating lots of ideas. In this phase you welcome whatever comes up, it's quantity before quality. Typical methods for this phase are all kinds of brainstorming, automatic writing, and association exercises. Then convergent thinking is about focusing, narrowing down, evaluating and selecting valuable ideas. Typical tools to support convergent thinking are all kinds of prioritising systems and matrices, but also systemic constellation or prototyping or rituals to let go of old ideas.

Searching for an Idea or Being Found by an Idea

How do you see your role as a creator in this process? Are you someone who actively searches for the idea and “makes” the idea? Or are you like a channel, like a well-tuned radio, that crystallizes the ideas from the ether and makes them visible and tangible for other people? There are helpful tools for both approaches.

The “searching for the idea” approach is more active during the ideation process itself, more extrovert, more cognitive and systematic, such as lateral thinking which is actively searching for blind spots.

The “being found by an idea” approach focuses more on the preparation and the basic attitude, is more introvert and more intuitive. Tools that support this approach are of a more meditative quality, often not so visible and tangible but still powerful like meditation, Zajonc’s cognitive breathing, Presencing Tools from theory U, Gendlin’s Focusing or Perspective Carousel.

Order and Chaos

Get inspired by Immanuel Kant who had an immensely structured and predictable lifestyle which allowed him to concentrate his full attention on his thinking and writing instead of wasting mental capacities for mundane decisions. Especially if you feel they are caught up in routines, turning in circles and bringing up again and again the same kind of old and known stuff, it can be helpful to shake the group up a little and bring in some interventions of disorder or surprise. Invite disturbances in that phase, change known procedures, challenge their expectations.

Some chaos can be highly productive, too. It depends on the team and where they are in the process. Especially if you feel they are caught up in routines, turning in circles and bringing up again and again the same kind of old and known stuff, it can be helpful to shake the group up a little and bring in some interventions of disorder or surprise. Invite disturbances in that phase, change known procedures, challenge their expectations.

Scarcity and Abundance

It is a joy to work in a full workshop of prototyping tools and beautiful materials. Use sensual and attractive materials to fuel your innovation processes and relish the abundance. Nevertheless, “the more the better” is not always true. Sometimes restriction can be still more productive, let’s say you have just 5 minutes for a certain task or only an A4 sheet of paper a piece of string and a bit of sellotape. Restriction might bring you to ideas you wouldn’t have been able to come up with, if there was an over-abundance.
Use Your Freedom

You now know what it takes to steer your ideation plane through this process. Many sets of methods have been developed to assist that process. Approaches like Design Thinking or Theory U or Future Workshop⁷ are systems with pre-set switches for each phase that narrow the choice of tools and thus make it easier, just like a recommended travel route. Use those routes as long as they serve you. Beyond those you now know how to steer your innovation airplane beyond the pre-set routes by setting the switches according to what your group needs. Use that freedom and enjoy the fresh air that touches your nose being an independent pilot of your own facilitation processes. Happy journey!

References
Causal Layered Analysis (CLA) is the brainchild of futurist Sohail Inayatullah (2004, 2015). In developing this method of unpacking reality, Inayatullah drew on his knowledge and experience of the Western philosophical tradition of post-structuralism which understands reality as constructed from discourse. In short, we are narrative beings who sense make, and reality make, through the telling and enacting of stories. Inayatullah also drew on Eastern Tantric philosophy which describes consciousness as layered and experiential. This is essentially a pragmatic stand in which we enact our consciousness across a layered reality that moves from the material to the subtle. CLA therefore offers four mutually supporting categories that help facilitators and work-shoppers reflect on their world and the layered nature of their sense making.

**Litany**

Litany is the surface layer and relates to the day to day ‘noise’ we inhabit. News headlines, the rhetoric of fears and hopes, conversations between partners, employees, bosses and the shop assistant fall into this category. So too do material objects like cars that constitute traffic, populations, migratory birds (or refugees), droughts, fires and floods; drones and ballistic missiles. Cultural elements such as the crucifix, the hijab, mosques, synagogues, turbans and bikinis. This list can be endless and yet all these elements reference other layers of the CLA process. Beneath litany sits **System**.

System relates to the social systems in place to manage and facilitate social action. It is different from systems thinking, which relates to using a systems perspective (a worldview) to view a situation that could encompass all four layers. This layer involves the social structures that coordinate what may probably occur at the litany level. According to Inayatullah, the social, technological, environmental, economic and political (STEEP) systems delineate key factors that should be taken into consideration at this layer. The development of understanding relating to the systemic layer enables one to question how the social structures in place strive to manage the litany. They also reveal the worldviews that provide the logic to system level action, and the kind of solutions systems generate.

**A worldview** is a coherent set of ideas that coalesce to form an internally consistent opinion of the world. The dominant worldview of Western society is that the world is made up of distinct entities and that a flourishing economy is of highest priority. Such a perspective of the world influences the social structures at the systemic and litany layers. At this level, comparison can be brought to bear between the dominant individualistic worldview of late Capitalism with more holistic perspectives, such as those associated with Indigenous philosophies such as Ubuntu and shamanism, that prioritise the value of collaboration and interconnectedness. Worldviews are powerful. They draw their energy from commitments of those who hold them to deep seated – often unconscious – assumptions about reality. These are the myth and metaphor of the fourth layer of CLA.

The deepest layer in CLA is the **myth/metaphor**, which, as noted above, is the generative foundation of the elements that comprise the worldview. George Lakoff defines metaphors as a ‘cross domain mapping in the conceptual system’ (1992, p. 1). A metaphor is formed when two aspects of the world become connected in a meaningful way. So, the image of the factory links with the perception of efficiency, order and productivity to produce a generative metaphor for capital production and modernity. This metaphor is mythic in that it offers a half truth that is compelling and hegemonic. When we access the myth/metaphors that underpin our realities we discover a creative freedom to re-enchant our world. Shifting myths and metaphors brings about deep and lasting changes in both individual lives and civilisations.
Putting CLA to Work

In November 2015 I ran a workshop with futurist Shermon Cruz in Laoag, Philippines. One step of the workshop involved colleagues gathering at tables to explore their working context by constructing a CLA of a pressing issue. A group of town planners, all women, sat at their table and decided to look at the problem of traffic and congestion in the old city. They drew up their categories and started populating them as follows:

<table>
<thead>
<tr>
<th>Litany</th>
<th>System</th>
<th>Worldview</th>
<th>Myth/Metaphor</th>
<th>Fortress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cars, buses, motorbikes, pedestrians, narrow streets, traffic police, angry drivers, lost time</td>
<td>Laws, infrastructure, not enough parking, not enough public transport, traffic rules (disobeyed), traffic police powerless, planning</td>
<td>Philippines is chaotic, individualism, value the past, modern city is..., authoritarian government, strongman tactics, citizen and community values</td>
<td>City of God</td>
<td>Car to care!</td>
</tr>
</tbody>
</table>

CLA of Traffic Congestion issue Laoag, Nov 2015

They started at the litany level which is usual for people who have just been introduced to the method and quickly populated the litany, system and worldview and when they got to myth/metaphor they had the key images of the City of God (good Catholic image) and the city as Fortress. However, they wanted to transform these static images to something more dynamic. But were momentarily stuck. It was when they presented their CLA to the group that they suddenly came to the new myth/metaphor that could seed a different logic (narrative frame) for what they wanted to achieve. They wanted to move from ‘Cars to Care’!

Reflection

The CLA process is deceptively simple. Don’t be fooled. The more you use it the more it challenges us to understand our world as process oriented (Bussey 2014). We discover the power of narrative and also the excitement people feel when they can engage with narrative transformation as evidenced in the re-framing from Cars to Care in the Laoag example. One thing that usually occurs is that participants in CLA construction come to see that each layer has its own logic and its own actors. They also quickly notice that there are often deep contradictions in each layer. For instance, in the worldview level above we see the tension between citizens and community values and authoritarianism which is characteristic of the Philippines’ context. Similarly, we have the tension at the system level between laws and law enforcement and the organic chaos of Philippine traffic.

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Anticipation and Grace Hacks

Marcus Bussey

Anticipation is a key evolutionary driver in life. Even microbes anticipate. This is so because anticipatory systems are built into the DNA of all living things (Bussey, 2017a, p.2). As humans evolved into cultural beings, whilst retaining (but taming a little) their instinctual beingness, anticipation became an increasingly cognitive, intuitive and emotional dimension of human processes. Culture can be understood as an anticipatory system. It has evolved to keep us safe and to provide a context for identity formation. Cultural beings anticipate through the use of memory, foresight, voice, optimism and yearning.

Each of these processes are sense-making tools and help individuals and groups manage the world and create anticipatory responses to emergent contexts. The nature of culture, however, is that it is constructed in patterns of sense making that often inhibit effective or timely anticipation. Culture manages change by trying to slow it down! Sometimes however, the need for change is pressing. At such times (to avoid a revolution of collapse) it is important to have mechanisms such as futures thinking and practice to strategically initiate cultural changes that promote preferred futures.

The rise of Anticipation in (educational) futures discourse and practice has been rapid. Its mix of systems science, critical possibility and evolutionary explanatory potential has attracted many to explore it as a category of relevance in rethinking dominant social and personal processes and their alternatives. Roberto Poli held the UNESCO Chair of Anticipatory Systems 2014-2017. In 2010 he teamed up with Riel Miller, now Head of Foresight at UNESCO in Paris, to lead a special issue of the journal foresight themed: 'Understanding Anticipatory Systems'. In 2017 Poli edited the massive Springer Handbook of Anticipation. In 2018 Riel Miller also published Transforming the future: anticipation in the 21st century. Another important foray into anticipatory foresight is the 2017 special issue in Futures on ‘critical anticipation’ led by Sarah Amsler and Keri Facer following the 2015 First International Conference on Anticipation’.

This special issue, entitled Learning the Future Otherwise: Emerging Approaches to Critical Anticipation in Education offers a solid introductory map of critical anticipation’s capacity to generate alternative approaches and “disrupt [the] instrumental framing of education as servant of a predictable future” (Amsler & Facer, 2017, p. 1).

For educators, scholars and practitioners the discipline of anticipation is generating powerful new narratives with the capacity to produce shifts in practice and the consciousness that underpins this. This is so because anticipatory systems are learning systems.

Futures Senses

These senses are by and large natural to us. We remember and we anticipate (memory and foresight). We act as if we were for the most part free agents (voice). We cherish hopes for the future (optimism) and we yearn for greater meaning, greater fulfillment, more belonging or simply more (yearning).

This yearning lies at the heart of the human process, and if we wish to walk on very thin ice: progress. These senses also connect us to others. We remember and anticipate as communities. We act as co-creators. We share our hopes and fears with others, and we yearn together for wonder and connection. The relational nature of these senses and the anticipatory aesthetic they underpin suggests a new modality for being human.

(Bussey, 2017b, p.50).
I developed the futures senses approach as an aesthetic response to the need to transform culture. Aesthetics involves embodied responses to stimuli that feel ‘right’, induce a sense of pleasure and the ‘good’. Anticipatory aesthetics explores memory, foresight, voice, optimism and yearning through this lens. I use play, dance, poetry, critical reflection, improvisation, emergence/immanence, drawing, dialogue and role play amongst other processes to trigger disruptive moments that invite ‘reality-quakes’.

Such quakes reveal the realities inhabited by communities, organisations and individuals as remarkable, unstable and fleeting. I have argued that they are hacks on the cultural programming that inhibits change (Bussey, 2017c). The most powerful of which are ‘grace-hacks’: those processes that “peel back conditioned being and habit revealing what a remarkable, magical deeply connected world we inhabit.” They frequently rupture “the given and insert a new expansive awareness into the fabric of our being. On such occasions time might stand still, slow down, fold or spread out” (Bussey, 2020, forthcoming).

In workshops grace hacks can emerge from many quarters. The indication one has occurred is the energy shift. There is an upbeat feeling, high energy and an expanded sense of optimism and positive anticipation. For instance, I ran a workshop recently at the Federal University of Paraíba, João Pessoa, Brazil which began with a standard PowerPoint presentation followed by an Interplay session to illustrate the power of the anticipatory aesthetic process. For 45 minutes we moved, played, danced, improvised and dialogued. There were about 30 students and faculty involved. The circle reflection at the end was very rich in feedback that focused on personal insights that had emerged for participants involving their personal choices, hopes and values.

What is interesting about this session is that it was not shaped by a specific anticipatory inquiry or strategy goal – it was open ended rather than intentional. I was simply offering participants a taste of the ‘hack’ process. The relational and safe space this process generated was a significant element to its ‘effect’ on all of us. The reality-quake moved everyone to consider the future from the standpoint of their aspirations. In this context memory was submerged in a foresight context that emphasised agency (voice), optimism and yearning. Grace hacks are anticipatory by nature as they disrupt conditioning and habits that essentialise reality. The futures senses can be stimulated to reconfigure our sense making to reveal the world we live in as open and ready to respond to us as co-creative beings.

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Riding Complexity

Complexity is often confused with complications. In fact it is both simpler and more difficult: a complication can often be resolved, while complexity demands flexibility and - often - that broadening of perspective that is characteristic of transformative learning.
Diffusion of Innovations

Marilyn Mehlmann

In any process of social transformation the question arises: how best to reach large numbers of people.

The research on this topic originally addressed the question of why agricultural research was put to so little practical use. The resulting research into social diffusion became highly successful in changing the habits of American and other farmers - with highly unfortunate results, since the agricultural research pointed only to the advantages of large-scale monoculture, not to the associated risks. The success of this campaign did however prove the effectiveness of the ‘diffusion’ research, which has been and still is frequently used, for instance in marketing, to bring about unconscious change by consumers, professional groups, or citizens in general. The same research can be used to support the diffusion of conscious, transformative change.

This is not to say that no effort is involved. In fact, the initial effort may be as much or more than that required for a conventional ‘information’ or ‘nudge’ campaign. The benefits are long-term. There is an analogy to farming. A conventional approach to behaviour change is like growing vegetables under glass: it can work very well as long as there is a constant feed of energy, water and nutrients. With an ecological or permaculture approach, on the other hand, effort is needed to establish the plants; but once they are established, the necessary input is minimal.

Shifting Norms

How new behaviour spreads through a population is often referred to as ‘social diffusion’ or ‘diffusion of innovations’. From this research has emerged, among other things, the concept of the ‘change agent’.

A basic premise is that innovators are by definition not ‘one of us’, and are therefore not listened to by most people. A change agent is someone who is ‘one of us’ yet has the ability to hear and interpret what the innovator is saying. The change agent is sometimes referred to as a ‘first follower’: the critical person for an innovation to begin to spread.

The next stage is for the innovation to be picked up by ‘early adopters’. In marketing terms this may translate into invitations for the public to ‘join a Beta test group’ or otherwise distinguish themselves as pioneers.

Amoeba Modell, adapted from Alan AtKisson, Believing Casandra (1999)
Roger Everett lists five principles that determine whether the innovation will make the next leap, to the ‘early majority’.

1. **Relative Advantage** – Is the innovation better than the status quo? Will people perceive it as better? If not, the innovation will not spread quickly, if at all.

2. **Compatibility** – How does the innovation fit with people’s past experiences and present needs? If it doesn’t fit both well, it won’t spread well. Does it require a change in existing values? If members of the culture feel as though they have to become very different people to adopt the innovation, they will be more resistant to it.

3. **Complexity** – How difficult is the innovation to understand and apply? The more difficult, the slower the adoption process.

4. **Trialability** – Can people “try out” the innovation first? Or must they commit to it all at once? If the latter, people will be far more cautious about adopting it.

5. **Observability** – How visible are the results of using it? If people adopt it, can the difference be discerned by others? If not, the innovation will spread more slowly.

The second principle is particularly challenging for agents of transformation since - as it indicates - a change is much easier when it isn’t transformational.

The main bridging function here is that of the change agent: the person or group that has understood the potential benefits and is able to communicate them to others.

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**From Early Adopters to Early Majority**

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**Practical Experience**

Working with environmental groups in the 1980s was hard work. We often seemed to be banging our heads against a brick wall. But playing the ‘social diffusion game’ (a method developed by Alan AtKisson) made many things clear. In particular: we too often allowed ourselves to be lured into fruitless debates with ‘laggards’: those people least likely to adopt the behaviours we felt were desirable.

Today the parallel might be with climate change. How many would-be transformers of society are spending most of their time and energy in useless debates with ‘deniers’? In many countries the same could be said of immigration issues, or bank ethics, or... pick your challenge!

Once we redirected our energy to focus on change agents and early adopters, we began to achieve much greater results. Part of our learning was how to formulate invitational text to attract the next population segment - without extensive research to find out who they were, since the text itself attracts appropriate people.

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Symmathesy

Ursel Biester

Symmathesy is a term proposed by Nora Bateson. She suggests we need another word for “system”: one that captures the interconnectedness in learning that living organisms are always engaged in, simply by being alive.

A possible dictionary entry could look like this (source: Nora Bateson’s blog):

**Symmathesy (Noun):** An entity composed by contextual mutual learning through interaction. This process of interaction and mutual learning takes place in living entities at larger or smaller scales of symmathesy.

**Symmathesy (Verb):** to interact within multiple variables to produce a mutual learning context.

If we conceptualize ourselves not as separate beings but as organisms within a context of other organisms, we quickly see and feel that we are not the independent subjects we thought we were. This is not to deny that we have our own agency - of course we do; but it is influenced and restricted by our context far more than we might want to believe. If you have ever been in places where you were able to think certain thoughts and later came back to your original surroundings and those thoughts seemed to have vanished, you know what I am talking about. We are highly influenced by the context we inhabit, even in the thoughts we are able to think. So what would you need to do to change your thoughts?

Gregory Bateson (Nora’s father) said: “The evolution is in the context.” You can also say: transformation is in the context. This implies that transformation can only happen in collaboration, as living organisms within a context interact and symmathesy. Learn together.

From Nora Bateson’s blog:

In our research with the IBI (International Bateson Institute) we have engaged in a research process that has as its mission a search for relational data, or what we call “Warm Data.” The IBI aims to devise and design research methodologies that use multiple descriptions to illustrate how interactions in complex systems interlink. These multiple descriptions increase our ability to take into account the integrity of multi-layered living systems, to think about multi-layered “interactions”, and to engage change at a contextual level. Revealing the inter-weavings of complex systems requires a research method that can encompass the many contexts in which the system forms interdependency. Therefore these studies are also transcontextual.

The complexity of this sort of inquiry is daunting. If we are to study, for example, the way in which food impacts our lives, a multi-faceted study of ecology, culture, agriculture, economy, cross-generational communication, media and more must be brought to our study in a linking of interfaces that together provide a rigorous beginning place from which we may better understand what is on our plates. From that beginning position our inquiry into eating disorders, poverty and hunger, and the dangers of GMOs, can be approached in another fashion altogether. How do these contexts interface with one another?
Inclusion is Central
When we work from this consciousness of not only interconnection and community, we quickly understand how important each and every organism is when it comes to transformation. None can be left out, each and every one influences.

For ease of understanding, let’s focus on people as living organisms. People are themselves a symmathesy of cells, bacteria, microbes, however small or big a context you want to look at. People symmathesy with other people, forming for example a class of university students. The quality of that class emerges from that interaction and each symmathesy (=person) in it is influenced and restricted by the context, while influencing and restricting it at the same time.

This is relevant for transformative learning because when wanting to raise the quality of our classes, it directs our focus away from the facilitator, even away from only the interaction between participants, and focuses on the emergent process of mutual learning. This can inform our design and our actions in the classroom. It can change our attitude and humble us, by awakening our awe for the big web of life we are participating in. It can inform our actions and trigger us to interact with our learners and ourselves with endless curiosity.

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A New Approach to Statistics: Warm Data
Since symmathesy is a new way of understanding the system(s) we are and we live in, we also need a different way of gathering data about them; one that reflects this understanding of relatedness. Traditionally science tried to cut things into pieces and understand each of them and how they work together. However this reductionist approach cannot capture the implications that arise from understanding things as symmathesis. For this reason, the International Bateson Institute is developing and teaching the concept of Warm Data.

Letting Go
For me this way of understanding reality is helpful because it takes away a pressure I sometimes feel for “transforming” my learners. Of course I know this is not possible, but my old way of looking at learning contexts still sometimes takes over. Picturing myself as a symmathesy in symmathesy with other symmathesies quickly gets me out of that pressure. I realize that I indeed play a role in their learning and transformation process, and I am glad for it, but I no longer feel constrained by a responsibility which in fact I cannot fulfil.

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Klaus Schenck

Systems Thinking (“ST”) is not any one “thing”, not one single, clearly defined concept or method. Rather, ST is itself a set of interconnected, partially overlapping, partially complementary, partially contradictory aspects and theories, being developed since the 1940s, and mutating in time and across schools of thought.

The non-linear dynamics of “complex adaptive systems” (CAS) is hard to grasp for our rational minds. Sometimes only some wild or weird sense of humour helps to cope with its irrational and counter-intuitive effects. Terry Pratchett’s “Science of Discworld” is a fun example.

On the other hand, “leverage points” for “butterfly effects” (large effects from small initial causes) can be identified and utilized directly. The world climate is a perfect example of a major CAS with its own, non-linear dynamics in search of a new balance (Booth Sweeney et al, 2011).

ST nourishes the hope that it might still be possible to find those small interventions that escalate to the big, transformative effects that we urgently need in our efforts to save our world, and our kids …

Donella Meadows (2009) wrote:

“I don’t think the systems way of seeing is better than the reductionist way of thinking. I think it’s complementary, and therefore revealing. You can see some things through the lens of the human eye, other things through the lens of a microscope, others through the lens of a telescope, and still others through the lens of systems theory [which Joel de Rosnay calls a “macroscope”]. Everything seen through each kind of lens is actually there. Each way of seeing allows our knowledge of the wondrous world in which we live to become a little more complete.
Complex Adaptive Systems “surf the edge of chaos”. In a CAS, linear causes for observed effects are hard to isolate from all other influences, and the final effects of our well-intentioned interventions are hard to predict. Or for short: in CAS, “intentional interventions are (all but) impossible.”

Still, we need to learn about and to manage the CAS around us, from our kids to our planet, as best as we can. How do we do that? ST might help.

The “fractality” of CAS’ – the similarity of patterns across orders of magnitude – allows us to learn about the behaviour of interacting agents on one system level from better understood patterns on other system levels, or other systems. For example, conceptualizing employees in teams in organisations as cells in organs in organisms helps us see different options compared to conceptualizing them as cogs in a gear in a machine (Morgan, 1986). Even emotions can be conceptualized as being part of some “fractal affect logic” (Ciompi, 1997).

Small daily practices like the following may help to apply ST and better understand its transformative potential:

- Notice the multiple systems (in and) around you
- Play with multiple perspectives and multiple questions
- Notice timing (speed, delays, …) of life’s processes
- Sketch out one causal-loop diagram a day.

My Journey with ST

Being a “teaching level certified systemic consultant”, I have been searching for a long time for a convincing and concise definition of “systemic”. I only found partially contradictory ones. The same is true for my attempts to define ST.

My first contacts with the ideas of ST were the Club of Rome’s report “The Limits to Growth”, Vester’s “Urban Systems in Crisis”, and “stocks and flows” of de Rosnay’s “The Macroscope” in the late 1970s. They all came out of a tradition of “system dynamics” as developed at the MIT by Jay Forrester and his co-workers. 30 years later, Donella Meadows updated her ideas from those days in her very readable book “Thinking in Systems” (2009).

Later I learned that the scientific fields of “cybernetics” and of CAS are closely linked to ST. Important roots had been developed in the series of the surprisingly interdisciplinary “Macy Conferences” on cybernetics between 1945 and 1953. Norbert Wiener, Gregory Bateson, John von Neumann, Warren McCulloch and Margaret Mead were just a few of their many prominent participants.

CAS, later also studied by the Santa Fe Institute, Peter Senge and his “Society for Organisational Learning” or, for example, the Human System Dynamics Institute, offered insights into the order in their (non-linear) “chaos”, of “butterfly effects”, and “fractals”, to name but a few. Still later, the “Cynefin Framework” (Snowden and Boone, 2007) helped me to further understand “chaos” and “complexity”, as opposed to “simple” and “complicated”, as separate “domains” of our world.
Systems have been described by various authors as consisting of, or emerging from:

- Elements and relations between them (with Gregory Bateson, in “An ecology of mind”, claiming that “the world consists not of elements but of relationships!”)
- Parts and wholes (and “mereology” being the science of parts and wholes)
- Linear and circular connections or influences (“causes” and “loops” – and butterfly effects resulting from their escalating feedbacks)
- Logical levels and scale non-variance (“fractality”)
- Non-linear dynamics (as described in system dynamics and synergetics)
- One single operation (according to Maturana, Luhmann)
- Interdependencies and “accounts of justice” (called “invisible loyalties” by Boszormenyi-Nagy)

In attempting to combine all these aspects into one model, CORFU (Schenck, 2006), I identified eight clusters of system theories:

1. System dynamics: interconnected entities involving multiple “feedback loops” (Jay Forrester, Frederic Vester).
3. Academic management models: hopes of feasibility on the edge of system dynamics and self organisation (University of St. Gallen, Dietrich Dörner).
6. Systemic family therapy and consulting: from California to Milan to Heidelberg (Virginia Satir, Gregory Bateson, Mara Selvini-Palazzoli, Helm Sterlin)
8. Language focus: from philosophy to therapies like “solution focused brief therapy” or “clean language (from Wittgenstein and Erickson to e.g. de Shazer and Grove).

What are those ‘systems’ in ST anyway?

Some of the ST “flavours” and ideas have deeply influenced my understanding of the world – and have very practically helped to improve my work. “Systemic therapy” and “solution focus” have deeply shaped my way of coaching and organisational development consulting. And “Critical Chain” (project management application of Eli Goldratt’s “Theory of Constraints”) has, after having been an intellectual “hobby” for almost ten years, suddenly turned into my major source of income since 2015 — the practical experience of a “butterfly effect”, with very tangible consequences. More recently, ideas from self-organisation like “agile”, “lean”, and “kanban” followed a similar pattern.
PS
Whatever else you may take away from ST, please stay curious! And never end your explorations into further aspects of systems of all kinds.

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Learning for Change

Marilyn Mehlmann

There is a widespread misconception that the best ways to learn from experience are either to study others' success stories ('good practice') or to learn from one's own mistakes.

A faster and more creative way is to focus on positive aspects of one's own experience while considering what could be (further) improved. This is the basis for the Learning for Change model developed and delivered to participants from more than 40 countries, over a decade of action research and practical experience.

The source of the model was to be found in frustration:
- Why did it seem that every project for sustainable, transformative change either started from zero or attempted to replicate a previous project?
- Why were huge challenges - for instance, global climate change - often met with puny ambitions, which though inadequate were seldom fully met?

In brief, we asked ourselves: is there a way to become much, much more effective at learning from experience? The question was posed by Nadia McLaren and me in 2003. An international, unfunded work group formed spontaneously to explore and experiment. By 2009 there was a coherent methodology and a workshop format.

Since then the model has been continuously updated, and used to teach people from more than 40 countries, with facilitators trained in Europe, Africa and Asia. It provides support in particular for competences 2, 4 and 6. The workshops are entirely experiential: participants are supported through a set of generic steps enabling them to learn not only from their own but also from each other's specific, case-study based experiences.

The theoretical underpinnings of this empirical model for collective transformative change come from different sources, and indeed the methodology introduces no new methods but rather represents an innovative way of linking existing methods. Part of the innovation is in the nuances: apparently insignificant shifts in pedagogy that have powerful cumulative results, transforming the educator into an empowering facilitator and coach.
1. Preparation: participants are given a template to describe in advance, on half a page, the personal experience from which they wish to learn during the workshop.

2. Sharing case studies in a small group, where the first step is ‘boasting’. Nominal Group Technique (described in Benaim & Mehlmann) is used to identify challenges. This step is an empowering alternative to a SWOT analysis.

3. Exploring challenges/learning opportunities: a set of exercises using Deep Listening and deep questioning, or 'YYY'.

4. Peer support: a set of exercises building the competence of each participant to support others, and to receive peer support, while drawing learnings from case studies in small groups. Methods include feedback techniques (how to ask for, give, and receive feedback) and a highly effective method for organizing meetings, Fleck’s Synergy Method.

5. Set intentions for change in line with the harvest of learnings. Methods may include collaborative prioritization, Devil’s Advocate, risk analysis, personal or group planning, described in the Learning for Change book.

**Positive Deviance**

“Positive deviance (PD) is an approach to behavioural and social change based on the observation that in any community there are people whose uncommon but successful behaviours or strategies enable them to find better solutions to a problem than their peers, despite facing similar challenges and having no extra resources or knowledge.” - Wikipedia

When faced with a challenge, it’s easy to fall into the trap of believing that those ‘good practice’ examples “would never work here”. Instead we can ask why it works there. Usually the answer is not obvious. Not least, it may be found in a lateral process not initially regarded as relevant. For instance, in one poor-district school with outstanding results and relations, it was found that the key was the behaviour of the school janitor. He knew every pupil by name, and greeted them each morning. In other words, the positive deviance was due not to differences in the core activity (class-room education) but to a lateral phenomenon.
Theories and Models
Some seminal sources have been:
- Pattern Language
- Action Research
- An empowerment spiral (behaviour change)
- Empowering Coaching
- Psychosynthesis, particularly as it affects action competence, intention, and motivation
- Social diffusion mechanisms

You will find information on all of these in this book, except for psychosynthesis (ref Sørensen).

Some Documented Outcomes
Workshop outcomes have when possible been followed up with surveys and interviews. Some outcomes are unequivocal and quantitative. For instance, over 90% of surveyed workshop participants report that they have made changes in their way of working. We also checked the use of the individual methods, separately from the whole methodology: the most popular is Fleck's Synergy Method, closely followed by some of the methods for peer support.

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See also chapters
- The Empowering Facilitator and Coach

A ‘Learning Organisation’?
Some decades ago, the concept of ‘learning organisation’ became a buzzword in organisation theory. Sadly, it appeared to be an unattainable ambition: people learn, and when they leave an organisation they take their learning and experience with them.

It therefore came as a big surprise to find that Learning for Change actually carries the potential to create a learning organisation. We discovered this almost by accident, when colleagues began to use the methodology consistently within their organisations. In particular it has been used as a project tool: at the beginning, to help set ambitions and priorities; mid-term, to follow up and adjust; and at the end, to evaluate and forward learnings for the next project. What happened astonished us. The team became super-effective, constantly raising ambitions - and surpassing them.

This is so far relatively unexplored territory, certainly worthy of longitudinal research.

A Learning Organisation in Ukraine
ESDA - Education for Sustainable Development in Action - was a highly ambitious 7-year project to establish ESD in schools in Ukraine. Each year the project management set higher ambitions, and each year surpassed their goals. It became a world leader at disseminating ESD in state schools: over a quarter million pupils taking part and 5,000+ teachers trained.

We adopted consistent use of Learning for Change with a participatory approach. First, an annual review-and-planning meeting used the L4C methodology. The core team invited a total of 25-30 people, and when they leave an organisation they take their learning and experience with them.

The clearest effect was the consistent raising of ambitions, and a track record of meeting and usually surpassing all quantitative goals. The primary funder was not only delighted but also surprised: they declared it ‘one of [their] best investments ever’.

– Prof Olena Pometun, project director
Action Research

Marilyn Mehlmann

“There are many types of action research that can be grouped according to their different aims, interests and perspectives. For education, critical (Carr & Kemmis), participatory (Kemmis & McTaggart) and emancipatory (McKernan; ZuberSkerritt) action research approaches are the most relevant, as they share a common goal of empowerment of individuals and groups to engage in actions for personal, institutional, and societal change.”

Timothy Bedford (personal communication)

We are today confronted with the urgent need for transformation: for a paradigm shift, in the sense originally delineated by Kuhn. Such a shift, which pre-supposes the ability to ‘catch sight of’ one’s assumptions, cannot be dependent on classical research methods, because they are too slow and too compartmentalized.

Another reason is that most (though not all) of the scientific and technical problems already have more or less adequate solutions. The key question is not how to make the science work, but how to make it work in practice, on a wide scale: it is a political and behavioural problem of how to change mind-sets, attitudes, values and behaviours. In such areas, classical research methods are of limited use.

One of the areas most often mentioned in connection with action research is education. There seems at times to be some fuzziness between Action Research and Action Learning (see chapter on Action Learning). A useful distinction is that Action Learning is something you do for yourself: I learn through action/experience, and through seeing the results of my actions.

Action Research, on the other hand, is also concerned with learning for the benefit of others. The experience and results must be replicable and transferable (offered, taught) to others not part of the original practitioner population.

Action Research is not a single phenomenon but rather a range of methods and approaches. What they have in common is the convergence of researcher and practitioner: researchers participate – in some measure – in the activity being studied, while practitioners contribute – in some measure – to the research.

In other words, the intention of an action researcher is not only to observe, study and describe but also to influence, change the course of events – and observe and record the results. Similarly, the intention of a practitioner in an action research project is not only to engage in an effective change process but also to learn from the process – and to contribute to an analysis that will permit others to learn from the process, too. To a greater or lesser extent, the ‘object’ of the research becomes a ‘subject’ (a methodological shift somewhat analogous to that demanded by Heisenberg’s uncertainty principle for research into subatomic physics).

One may imagine the scope of Action Research on a scale from R(researcher)-dominated on the left to S(subject)-dominated on the right, where some of the stations might be:

- R offers observations and analysis
- R responds to direct questions
- R intervenes proposes criteria
- S develops evaluation
- S engages in continuous self-assessment
- S formulates research questions/hypotheses

Action Research in Education

Researchers Participation/Practitioner Research
Is it Possible to Research without Influencing?

In the classical view of research, the ideal researcher is purely objective and has no relation or interaction with the object. Classical scientific methods intend to isolate single questions, pare away contextual influences and minimize potential subjectivity of the researcher to the greatest extent possible. It may be questioned, however, whether such a pure approach is possible in any situation where the ‘object’ is a person (morally a peer) or a number of people; at the very least the researcher needs to be sensitive to her/his potential influence.

Dual Perspective

A general characteristic of action research is the need for the researcher to hold a dual perspective. S/he is at one and the same time an active participant and an observer and analyst. This may or may not also be true of the practitioners/subjects, depending on the approach chosen, but is of necessity true of the researcher. Thus, the practitioner/subject/learner may in principle take full responsibility for evaluating the course of events, including formulating research questions and criteria for success; but the researcher always retains overall responsibility for the broader analysis.

The initiative may come from either ‘side’ identifying an opportunity: practitioners may identify research questions to which they seek answers, or researchers may identify a planned or existing piece of work as an opportunity to explore existing hypotheses. Indeed, researchers may use an opportunity such as development funding to initiate a project as a basis for action research.

Personal Experience

Since the 1990s, I have come to regard all projects as an opportunity for Action Research, embedding principles of continuous self-assessment by and with all participants as well as paying careful attention to evaluation criteria. The benefits have been outstanding, resulting for example in some of the work documented in this book - see below, references.

Perhaps the most effective outcome has been the development of successively ‘higher’ orders of educational materials, for example from kindergarten to university to parents to general population to training for teachers and coaches - and further, to training and certification for national trainers of teachers and coaches.

To take one example: the Learning for Change methodology (see chapter Learning for Change) was developed through Action Research, building i.a. on Pattern Language and Deep Listening as powerful action research tools. In turn, Learning for Change (which should perhaps have been called Learning for Transformation) is itself a vehicle for effective Action Research within an organisation.

References

A German social psychologist, Kurt Lewin (1890-1947) is often credited with ‘inventing’ Action Research. He is quoted as saying that “In order to understand a social system one must change it,” and “No research without action, no action without research.”

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Zuber-Skerritt 1996

See also chapters

Learning for Change
Pattern Language
Deep Listening
Empowering coaching and facilitation
Empowerment spiral
According to chaos and complexity theory, the environment is made up of an infinite number of systems and subsystems which are in a constant state of disequilibrium or change (Kauffman, 1993). As we move from ideas to action, a critical issue that arises is the gap between the world’s complexity and our abilities to manage such complexity (Kegan & Lahey, 2009). To meet the challenges of the future, we must move toward more complex levels and embrace the chaos.

Complexity and chaos theories provide an underlying framework for transformative learning theory and reduce the tendency toward linear and reductionist thinking, since they open the mind to the uncontrollable interconnectedness of all being. The study of complexity theory originates from the Sante Fe Institute in New Mexico, and was spearheaded by George A. Cowan, head of research at the Los Alamos nuclear laboratory. One of complexity theory’s leading proponents is Stuart Kauffman, author of At Home in the Universe: The Search for the Laws of Self-Organisation and Complexity.

“Life exists at the edge of chaos. I suspect that the fate of all complex adapting systems in the biosphere—from single cells to economies—is to evolve to a natural state between order and chaos, a grand compromise between structure and surprise.” - Stuart Kauffman

Complexity theory is defined as “an approach to the modelling of highly complicated and interconnected systems using techniques derived from the physical sciences, with a focus on self-organisation, emergence and non-linearity.” A complex system has the following properties:

1. Complex systems are adaptive
   - Spontaneous self-organisation occurs when agents/individuals constantly adapt to each other in ways that benefit them. Complex systems require a considerable amount of work to be done in order to “understand” them.
2. The number of possible reactions to any given change is infinite. We cannot predict the outcome of any given change to the system because of the intricate interactions that happen within a system, even when the external conditions are seemingly the same.
3. Competition and collaboration along with negative and positive feedback are always present. Negative feedback maintains equilibrium while positive feedback pushes a system toward the edge of chaos.
4. Complex systems cannot be easily described, and certainly not by simply listing their parts. There are underlying principles on the emergent traits that form based on the myriad of interactions within the system.

Insights from Practice

As the information environment becomes increasingly complex and challenging, more and more organisations worldwide are called upon to nurture transformative leaders capable of managing complex situations. Environments where there are high degrees of uncertainty, complexity, unpredictability and constant change require a greater capacity for understanding the different elements and situations surrounding such environments. This entails a great deal of sense making and learning at the edge of chaos. Mezirow stated, “To make ‘meaning’ means to make sense of an experience, we make an interpretation of it. When we subsequently use this interpretation to guide decision-making or action, then making ‘meaning’ becomes ‘learning’.”
Shift Mindset

In my experience as a facilitator and learning experience designer, the main application of complexity theory can be in shifting our mindset from a linear and reductionist perspective to perceiving a complex adaptive system, one that consists of interdependent, interacting elements that respond as an integrated whole to internal or environmental changes. A paradigm shift in our understanding and practice in education is needed if we are to cope with current challenges. Actions and behaviours will then change, based on this changed perspective.

Invite Inquisitiveness

Complex problems can only be understood and managed through complex frameworks. From this perspective, we need to constantly challenge our mental models of reality on how we understand the world. Transformative educators need to encourage sense-making as a crucial part of their programmes to allow for individuals to look at situations through different lenses, from different points of view, and to understand interdependencies.

Plan for Collaboration

In looking for solutions outside the current paradigm, different perspectives are crucial for generating new ideas and finding solutions. Effective facilitators of transformation understand that solving social complexity is a social process and thus engaging others is crucial.

Core reflective questions that I involve learners in are:
- What mindset do I have on this issue?
- What mindset do others have on this issue?
- What does this mean for me?
- What does this mean for others?
- Whose perspectives matter on this issue?
- How might I include other perspectives?

References


Peacebuilding and Non-Violence

Lina Westermann

Peacebuilding and Transformation
Our Human Capacity to Create a more Peaceful World

The preamble of the UNESCO charter states “war begins in the minds of men [sic]”. Therefore it is through changing our minds, our consciousness and our worldview, which are rooted in our culture, that we can transform the culture of war and violence into a culture of peace and non-violence (UNESCO). This preamble describes the dimension of peacebuilding and conflict transformation, the aim of which is to transform the cultural and structural conditions that cause deadly or destructive conflicts.

Peacebuilding has a large transformational component and can be distinguished from other related terms such as peacekeeping, peacemaking and conflict resolution. While peacekeeping involves stopping an ongoing conflict, peacebuilding starts even before a destructive conflict arises. In contrast to peacemaking, peacebuilding addresses the underlying causes of violence. The approaches of peacebuilding and conflict transformation are closely linked to systems thinking, as they involve engaging with and transforming the relationships, interests, discourses that support the continuation of violent conflict (Miall, 2004). In short, there is no peacebuilding without a transformational learning process.

Self-knowledge
In 2013, I started my Masters in Peace, Conflict and Development Studies at the Universitat Jaume I in Castellón de la Plana, Spain. The experiences, relationships and theories all contributed to a deeper personal process. It gave me more words to label my world, new lenses to see through, and a deeper understanding of human relations. The critical as well as the constructivist approach in Peace Studies raised many questions and awareness for power relations. It encouraged me to take more responsibility for my own learning processes.

Some History
Peace Studies have a wide range of frameworks to offer. In the last 30 years peace research has increasingly evolved towards more holistic approaches. Several authors have revised the epistemological status of the discipline (Galtung, 1996; Martínez Guzmán, 2001) and have given voice to a broader and more inclusive focus. The first person to broaden the peace concept was the Norwegian scholar Johan Galtung. From the negative definition that peace is the absence of direct violence and wars, Galtung completed the violence concept with the terms of structural and cultural violence and challenged the reductionist notion of peace. Structural violence is defined as anything that prevents people from meeting their basic needs.

According to Galtung, any discourse that legitimises or justifies structural or physical violence can be understood as cultural violence (Galtung, 1990). Peace Studies, with its interdisciplinary and intercultural character, convulses and undermines the idea of science, which was inherited by western modernity (Martínez Guzmán, 2001). It opens our perspectives to the multiple ways we can unlearn wars, violence and discrimination, and consequently learn to make peaces (Martínez Guzmán, 2000: 51). The term “peaces” in plural refers to the idea that peace can be thought of, understood, and experienced in a multitude of ways.
Riding Complexity

The systemic concept of peace derives from the transdisciplinary study of systems theory and draws on this integral view of life. Moving away from the reductionist understanding of peace as the absence of violence, several peace scholars support an integral view of life (Dietrich, Lederach, Goodman i.a.). Nonetheless, there is no exact consensus on how the field should be approached. Lederach uses the metaphor of a spider’s web to describe that every living thing functions within a system that is dependent on other living beings. In his book *The Moral Imagination* (2005), “nothing in the universe exists as an isolated or independent entity. Everything takes the form of relationships, be it subatomic particles sharing energy or ecosystems sharing food. In the web of life, no living lives alone” (Lederach, 2005: 34).

Lederach argues that the entire system of human relations needs to be changed, if we want to overcome cycles of violent patterns. Hence he also argues that building peace requires a shift in our worldview. Lederach states that moral imagination requires: […] the capacity to imagine ourselves in a web of relationships that includes our enemies; the ability to sustain a paradoxical curiosity that embraces complexity without reliance on dualistic polarity; the fundamental belief in and pursuit of the creative act; and the acceptance of the inherent risk of stepping into the mystery of the unknown that lies beyond the far too familiar landscape of violence (Lederach, 2005: 5).

Warriors of the Heart

Marilyn Mehlmann

Danaan Parry was a highly regarded international conflict mediator working in such (then) hot-spots as Northern Ireland, Pakistan, Afghanistan and Vietnam, until his untimely death in 1996. From his experiences, and based partly on the wisdom of the Hopis, he distilled a set of principles into a book, which he then also related to the ancient wisdom of the Essenes.

The Warriors principles are highly complementary to other approaches, such as Non-Violent Communication, because where NVC is based on behaviour, Warriors is based on personal, inner qualities and attitudes. Indeed, Danaan Parry and Marshall Rosenberg did succeed in holding a joint workshop shortly before Parry died.

Starting point

The first of Parry’s principles is very simple: Conflict is. It’s a given. Neither positive nor negative, it simply is: as soon as you have two people in the same room, the potential for conflict is present. Speaking as a psychosynthesis practitioner, I’d add that most times it’s enough to have one person present: most of us, when truly present, can identify any number of inner conflicts.
Transformation

Transformation is a crucial term in Peace Studies. Lederach describes it as a "comprehensive orientation or framework that ultimately may require a fundamental change in our way of thinking" (Lederach, 2003: 5). The concept of transformation recognizes that conflict is not always bad but often a constructive element of a dynamic society. For Lederach and other constructivist scholars, conflict is considered a natural occurrence between human beings who are involved in relationships. Social conflict is a "natural, common experience present in all relationships and cultures" (Lederach, 2005: 55). Hence this approach supports a belief in the creative, constructive and nonviolent capacities of our human society (Lederach, 2003: 4).

Peacebuilding, from this perspective, is seen as an ongoing process rather than a product. From this point of view, there is no society without significant elements of peaceableness (Boulding, 2000: 89).

Learning

Creating a culture of peace requires a fundamental change in knowledge, attitudes, behaviours, and worldviews, which enables people to take action for a more peaceful world. Thus a fundamental tool for transformation is changing the way we learn. According to Boulding, a culture of peace requires that we grow in our humanity. Most of all we need a kind of grounding in what it means to be human on this planet. We should ask ourselves the following questions:

What is our relationship with all living things?

How do we grow to our full potential?

How can we grow in our humanity?

It all depends on what we can do in ourselves, as much as on what we can do in the world around us (Boulding, 2000: 59).

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Flow

Sometimes a change goes on underground, before it reaches the light of individual or collective consciousness. Honouring all moments and celebrating and supporting their specific character is one of the biggest challenges and opportunities for facilitators of transformation.
Emergent Learning

Christian F. Freisleben

Emergence means: complex systems and patterns arise out of a multiplicity of relatively simple interactions. Rooted in the work of learning theorists like Dewey, Piaget, and Vygotsky, emergent learning is defined as a process where teachers plan activities and projects based on the specific group of learners they are working with, taking into account their skills, needs, and interests. Emergent learning is always contextual, collaborative, and goes beyond the norms of intended learning: the curriculum is continually changing, developing and growing. Learners are motivated and supported to take ownership of the learning process; they don’t wait for new instructions, they also develop them, both alone and in intense peer learning.

Emergent learning also describes the effect of co-creating: ideas, concepts, prototypes, materials emerge in an ongoing process of learning. It is not possible or necessary to say exactly who is the “author” of these artefacts, they emerge in a collaborative way, where everybody is involved in a very intense way. Emergent learning is often perceived and described as an approach used for very young children and focuses on using games. In the last decade it has become clear that the concept lends itself to far more methodical approaches and that it can also have significant positive impact in the field of higher education and in organisational learning, also in co-operative settings or in urban development. Another area where emergent learning could or should be happening is online: for instance, Massive Open Online Courses (MOOCS) bring learners to work together in a very intense and agile way.

Emergent learning is characterized by:

• An intensity of interaction and collaboration, using and evolving networks with peers, experts and people all over the world
• Relationships are a crucial part of the content, rather than an add-on; learners are co-creating sustainable democratic processes
• Learners work in many modes of independence and self-reliance also regarding their individual learning paths – there is not only one possible solution to a given problem, and the problems themselves can be defined, outlined and evolved by learners
• An atmosphere of trust and mutual confidence, in which it is not only “allowed” to make mistakes but they are seen as an integrative part of every learning process; consequently, heavy use of experimental formats and approaches (of course, learners are still supported and also it is possible that they ignore this guidance)
• Learners are supported to come up with topics that are relevant to their own life, to the community, to important current topics in the world
• Unanticipated outcomes are anticipated... serendipitously - chaos is a crucial part of growth and learning
• There are boundaries, and clarity concerning them, especially if there is a risk that someone could get hurt
• It is not only the learners who are on a path of intense learning; also the teachers and the system in which they are embedded are learning from and with them
The Setting, the Tools

The setting for emergent learning needs a lot of preparation: The room used is as flexible as possible, filled with a great variety of possibilities to do research, to plan, to code, to visualize, to play, to write, to present, to give feedback to each other. Teachers act as facilitators and use many different, also well-prepared methods that support emergent thinking and acting. One key aspect is providing ongoing opportunities for play-based exploration. In such a setting, digital tools are a self-evident part; learners are supported to use these tools. One important role of facilitators is to support documentation in various ways. Importantly, it is not only written materials that emerge – a variety of materials may emerge, using audio, video, visualizations, recordings of theatrical methods and descriptions or recordings of games.

A part of the setting also involves a constant tap into current news all over the world: Emergent learning is not only transformative within an existing mindset, but also seeks possibilities to change mindsets, to evolve framework conditions in every part of society. Therefore, it has important connections in the practice and the pool of methods of civic education.

An important aspect of emergent learning is fostering and using tacit knowledge, which is connected with the ongoing collective experience. This builds a shared awareness that delivers impulses also for the organizational framework of e.g. a school or any learning environment, which also could be an enterprise or an organisation.

Those Seminal Moments

I have been teaching and facilitating for over 30 years. And I have been part of or perceived a lot of moments of emergent learning.

It is no problem to prevent moments of emergence by very rigid requirements, no room for dialogue and the complete exclusion of thinking out of the box. And it is possible, together with participants, to co-create settings that foster emergent learning. It is important to reflect together concerning the moments of emergent learning that occurred and what helped or hindered them. Based on that, everybody can bring in new impulses to evolve emergent learning.

References

Theory U
The Social Technology of Presencing

Griet Hellinckx

“Theory U” is a framework and a change method developed and described by Claus Otto Scharmer. He points out that collectively we tend to keep creating results that nobody wants. We live in a time of institutional malfunctioning and imminent collapse, which mainly becomes visible in the ecological, the social, and the spiritual-cultural divides. We are depleting the earth’s resources and destroying its natural balance. Nearly half of the world’s population lives in poverty and many people are out of touch with their own potential and inner Self. These symptoms are like the tip of an iceberg. Underneath there are structures and mental concepts that keep these systemic imbalances in place.

Based on a series of interviews with pioneers in different fields, Scharmer started discerning the steps these people took in creating something authentically new, as well as describing their inner attitude that had allowed them to be informed and guided by the potential they perceived.

To refer to the inner cultivation of the relationship with a deeper source of learning and knowing that is connected with the potential of a possible or emerging future, Scharmer created the word presencing. It refers both to the state of being present and the attitude of sensing.

The reason for the discrepancy between what is actually created and what would be life-sustaining is the lack of awareness of the inner place from which attention and intention originate. Presencing helps us to cross the spiritual divide and connect with our authentic Self, which is the deepest available source of inspiration and knowing. It helps us to get in touch with a future that is desireable and possible. When we start creating and leading from this place of potential, new approaches and solutions that are not based on separation and habitual thinking & taking action become possible. Scharmer describes the need for a shift from ego-awareness to what he calls eco-awareness. This implies that individual & collective mindfulness is the most relevant factor for transformational learning and change. It calls for the expansion of our perception and our thinking.

Scharmer’s work is inspired by Gandhi’s approach to nonviolent conflict transformation as well as Buddhism, Confucianism and Daoism. His thinking was also strongly informed by organizational development experts and German philosophers, in the first place by Rudolf Steiner.

In 2006 the Presencing Institute was founded in the USA to create an action research platform and to start applying Theory U and presencing as a tool for innovation in different fields. Since then a global network of projects, programmes and partners has been developed. In 2015 the u.lab was launched as a free Massive Open Online Course (MOOC) offered through MITx on edX. As of today it has reached over 100,000 people in 185 countries. They apply what they have learned in very different settings.
Open Mind, Open Heart, Open Will

As the inner awareness of the learner or change maker is crucial, the ability to observe one’s own thoughts, feelings and reactions has to be trained. Self-knowledge is thus essential. The process of presencing is based on what Scharmer calls the open mind, the open heart and the open will. This implies that one has to confront the inner voices of judgment/criticism, cynicism and fear.

The application of Theory U within a group setting consists of five steps.

1. First it is about uncovering a shared intention. For instance people working in a hospital might feel an increasing discomfort with their way of operating. They might find out that they all long for a system where there is more focus on supporting the patient in dealing with his or her illness in a responsible way.

2. In a next phase exercises can be offered that help everyone involved to see the reality of the group or the system from an unfamiliar perspective. The doctors might e.g. become patients for one day; the nurses could talk with the cleaning employees; the receptionists could interview the relatives of the patients that are discharged.

3. The central step that comes next is about connecting with the highest future potential for the issue at stake. In our example, it might be the vision of the responsible patient who feels supported, informed and respectfully treated by a professional team.

4. As soon as this has been touched upon, a new approach or form can crystallize and a prototype can be developed. This means that on a small scale a new approach is tested. Maybe the patient becomes the one who keeps the files or is the one to be informed first about the timing for the next treatment.

5. From the experiences that are thus being made an innovative eco-system can be developed and put in place on a larger scale. In our example it might have become clear that not every patient is interested in or healthy enough for such an approach. There might e.g. be a need for different options that can be chosen by each patient individually.

Otto Scharmer's work and projects keep inspiring me, because they connect personal awareness and development with system change.

Over the past 8 years I have been involved in monthly meetings where we practice presencing in a small group and thus "train our muscles" and deepen our understanding of this human faculty. Presencing needs training, but at the same time even the smallest steps are valuable and rewarding.

When we start shifting the field of our attention, so much more becomes possible. Especially paying attention to the four different levels of listening and speaking is helpful in any setting.

When we just download and repeat what corresponds with our habitual thinking, nothing new will emerge.

When we focus our attention on facts, we tend to compare them with what we already know. Such factual listening is a prerequisite in many areas of life, but has its limits.

Empathic listening takes our awareness a step further and is linked to the intelligence of the heart.

The fourth level of awareness can be called generative, as it generates new ideas, insights and approaches. It is based on an inner connection with what can be called the “Source”. It is where possibility and potential can be noticed.

In a module for future Steiner/Waldorf teachers (2011) I compared the process of creating art with the steps described in Theory U. This inspiring exploration was documented in a short film: https://www.youtube.com/watch?v=6YN5oz4HNGc (in German). Enjoy it!

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Daniel Christian Wahl

We all have the power to change the world. As a matter of fact we all do, every day, with everything we do, a little bit!

All our actions and inactions contribute to what kind of world we bring forth together. Our actions and inactions are guided by our dominant worldview and value systems. They affect our real and perceived needs and through that define the why, what and how we design solutions or consider dilemma resolution pathways.

When focussing on culture change and the transition towards a regenerative human impact on Earth at the upstream end, i.e. with the intention to unfold the potential of people and places rather than solve problems, I believe we need to change our culture’s guiding story. It is time to divest the gift of our attention away from the narrative of separation and competitive advantage.

Regenerative practice is activated by a narrative of interbeing and co-evolving mutuality with the place and wholeness we participate in. Regeneration and its healing of relationships between people and between people and place is about optimizing collaborative advantage.

Engaging with the people at your workplace or in your local community and bioregion in a process of exploring the more than 250 questions in my book ‘Designing Regenerative Cultures’ would certainly be a pathway towards having a positive impact.

I initially thought about calling the book ‘living the questions together’ as I did not feel I had definitive answers and solutions to share. I actually don’t think they exist. Life’s one constant is change.

To practice regeneration is to work on our individual and collective capacity to keep reinventing and transforming ourselves and our communities in response to the inevitable change and transformation of the systems we are embedded in. To do so more effectively we should pay more attention to what questions we ask and hold answers and solutions more lightly.

The way towards a future of diverse regenerative cultures everywhere is for people in place to live the questions together. To keep exploring how they can place-source more appropriate solutions that serve people and place, solutions that heal the planet, community by community, bioregion by bioregion.

Be wary of anyone offering you the gospel of regeneration. Regenerative pathways will emerge through your own participation in your community and your own contribution to helping to heal the Earth and her people in the bioregion you inhabit.

At the heart of it all, we need to ask ourselves:

1. How can I love myself, my community, and life as a planetary process more deeply and fully?
2. How can I best serve this interconnected miracle of life and my immediate community?
3. How can I contribute to healing the Earth and her people, and in the process heal myself and all my relationships?

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The Transformative Learning Theory of Jack Mezirow

Anneke Schaardt

Transformative learning refers to the process by which we transform our taken-for-granted frames of references (meaning perspectives, habits of mind, mind-sets) to make them more inclusive, discriminating, open, emotionally capable of change, and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action.

Mezirow 2012: 76

Jack Mezirow, born in the United States of America, worked as a professor of adult education. He introduced his theory of transformative learning in 1978. Since then the theory has been criticised, revised and further elaborated (see for example Illeris 2014, Merriam 2008 as well as Mezirow's own later work). To date, Mezirow is probably the best known author in the context of transformative learning. While, Taylor (2017) states that Mezirow's theory is only one of many views of transformative learning, it is still dominant in the field.

Making meaning about our experiences and interpretations of the world through critical reflection, and becoming aware of deeper values and assumptions, is central within Mezirow's transformative learning theory (Dirkx 1998). Mezirow describes transformative learning as the "process by which we transform our taken-for-granted frames of references". These frames of references can be viewed as lenses through which we see the world and through which we construct meaning from our experiences. They consist of values, norms and assumptions that we have about the world. Many frames of references are formed unintentionally within our childhood. They are assimilated from the culture we live in or derived from the personal perspectives of primary caregivers.

We are generally more likely to accept new information if it fits within our pre-existing frames of reference. Opinions that question these frames are often not taken seriously and rejected or even considered as "crazy". However, with changing circumstances some assumptions or norms might no longer be proper to guide action and it becomes necessary to transform them. For this process of transformation, Mezirow formulated ten necessary steps:

1. A disorienting dilemma
2. Self-examination with feelings of fear, anger, guilt, or shame
3. A critical assessment of assumptions
4. Recognition that one's discontent and the process of transformation are shared
5. Exploration of options for new roles, relationships, and actions
6. Planning a course of action
7. Acquiring knowledge and skills for implementing one's plans
8. Provisional trying of new roles
9. Building competence and self-confidence in new roles and relationships
10. A reintegration into one's life on the basis of conditions dictated by one's new perspective

Mezirow's ten steps have been tested in several empirical studies, and many confirmed that transformative learning often includes these phases, sometimes with a slight variation.
Transformative learning can be a very challenging process. This becomes evident when looking at step 2: “Self-examination with feelings of fear, anger, guilt, or shame”. Our frames of reference form part of our identity. “Who we are and what we value are closely related”. Accordingly, questioning one’s values can be seen as a personal attack.

In order to understand how transformative learning can be initiated in educational settings, Taylor (2000) reviewed 23 empirical studies about transformative learning in classrooms. He formulated six points which are relevant for promoting transformative learning:

- Fostering group ownership and individual agency
- Providing intense shared experiential activities
- Developing an awareness of personal and social contextual influences
- Promoting value laden course content
- Recognizing the interrelationship of critical reflection and affective learning
- The need for time

All in all, Mezirow’s theory, as well as Taylor’s study about transformative learning in classrooms, helped me to understand the complexity of these learning processes. I used this knowledge for revising my own seminar setup. Taking into account the ten steps, I roughly evaluated the students’ position within the transformative learning process in order to design the seminar in a way that supports them best in their learning. At some seminars it was important to start a transformative learning process by introducing a disorienting dilemma. However, sometimes I experienced that students had passed the first steps already and needed to explore new options of roles and actions in order to find possibilities to deal with a prior disorienting dilemma. So they were already in the middle of their transformative learning process.

For example, in the changemaker curriculum at the Kiel School of Sustainability, students plan and implement their own change projects, which address local social or environmental issues. More information in German about the changemaker curriculum can be found at yooowoedoo.org. We start the course by investigating social and environmental issues in Kiel. This can lead to a disorienting dilemma. However, the motivation of most students was rather to learn new skills and to be able to plan a course of action in order to deal with a disorienting dilemma which they had experienced beforehand. Therefore many were in the middle of the transformation process. The following quote comes from a student who took part in the changemaker curriculum:

“The change project course definitely gave me the confidence to feel that I can implement a change project pretty much anywhere in the world. I feel much more inspired to address any societal problems that I see, and I now think...
that it is possible; whereas before, maybe I would have felt overwhelmed by a problem and dreamt about a solution, but wouldn't have actually tried to carry it out. I feel that the course has sparked a creativity inside of me that had gone dormant in adulthood. And it feels nice! I think that it has opened my mind to more possibilities for my future.”

In this context the student changed from “feeling overwhelmed by a problem” to being inspired to address societal problems. Accordingly, their self-efficacy and feeling of being able to make a difference has transformed.

Concluding, Jack Mezirow’s theory of transformative learning is probably the best known theory in this field. It can help to understand the very complex learning process of transforming values and beliefs that form our way of viewing and interpreting the world and also ourselves and our actions. Mezirow describes the learning process as a very cognitive one. Other views on transformative learning focus more on, for example, emotional aspects. Further, Mezirow’s view is about individual transformation and does not emphasize social change. On this, other authors such as Paulo Freire can give further insights.

References


Beyond a Single Event
Creating Spaces for Community Transformation

Diego Galafassi

Researchers are not just knowledge makers or more conservatively, knowledge holders, and educators are not just knowledge transmitters (dominant paradigm in Western knowledge systems); we are all transformation makers and facilitators, and hence consciously or not, changing our own roles, identities and values in the process.

Research on Transformative Spaces in the Making

I was part of a team of 15 researchers who analysed nine case studies, all examples of cutting-edge action-oriented research on transformations from the Global South. The aim was to explore how to create spaces for developing initiatives and approaches that can contribute to large-scale, systemic transformations that strengthen the relationship between people and planet. This includes challenging the status quo to help address social and power inequalities. Indeed, these are issues that are arguably central to any social–ecological change process, and are particularly salient to the conditions of transformation.

We conclude that transformative spaces, through designing the engagement and dialogues in ways that involve and consider emotions and allowing for empathy, further contribute to humanizing the solutions. We argue this is a distinguishing feature of the co-created outcomes of transformative spaces, that they are immediately socially relevant, and neither impersonal nor apolitical. In other words, we can help create or support the seeds for transformation when these seeds are weak or completely lacking.

Transformative spaces allow for a reflection on the broadening and shifting roles of researchers in both North and South research communities. Another insight has been that creating transformative spaces is not about a single event or workshop. Rather it is a continued process of engagement through designed and facilitated interactions that often involve a series of workshops or programmes that requires planning, organisation and curation.

This work was a first attempt to synthesise some of the many learnings that a cross-case comparison can elucidate, whilst holding true to the individuality of the studies and recognising that these findings are not universal. With that caveat, we distilled five key phases from the nine cases.

In a first author workshop we developed a design framework based on the five phases, summarized in Table next page.

Personal Experience

My colleagues and I all have extensive experience working with such intentionally transformative projects, so our recommendations are based not only on case study research but also on hands-on experience. We urge anyone engaging in or designing research in transformative spaces to stay mindful of these five points:

• There are ethical dilemmas associated with creating a transformative space in a system
• It is important to assess the readiness of the system for change before engaging in it
• There is a need to balance between ‘safe’ and ‘safe-enough’ spaces for transformation
• Convening a transformative space requires an assemblage of diverse methodological frameworks and tools
• Transformative spaces can act as a starting point for institutionalising transformative change.

Figure 1. Five phases for the design of transformative spaces that iteratively feed into each other and are dynamic into the future (i.e., there is no determined end-point). (after Pereira et al. 2019).
**Central concepts:**

**Reflection Phase**
- Formative change
- Impacts of trans-

**Outcomes Phase:**
- Measuring
- Convening

**Operationalisation Phase:**
- Types of participants
- Quality of participation
- Issues to consider:
  - Power relations
  - Sectors perspectives
  - Incentives and ethics of engagement

**Tactical Phase:**
- Understanding change
- Measuring impact
- Experiential learning
- Appreciative enquiry
- Learning journeys
- Issues to consider:
  - Sensitive controversial topics

**Outcomes Phase:**
- Unpacking success
- Changes in behaviour, perceptions, mind-sets, values, beliefs
- Issues to consider:
  - Cross-level impacts
  - Uncertainties and unknowns

**Reflection Phase:**
- Contributions to the field
- Further research
- Issues to consider:
  - Socio-cultural and ecological dynamics and diversity

**Ethical Dilemmas**

First, all the cases raise some ethical dilemmas when creating a transformative space. Such spaces often start small, and so almost by definition, they are exclusive rather than inclusive. While they do not have to be organized as small “closed” spaces, the nature of the interpersonal interactions and engagement supports a more intimate design. Transformative spaces are designed to challenge the status quo, and hence change the systems conditions that created the problems. This carries a risk for participants, as actors in the system become nervous when power imbalances are explicitly identified. For some, risks could entail exclusion from their communities or even a fear for their own life (see Drimie et al. 2018). It is a question not only of ensuring the well-being of all participants but also of managing expectations of change.

**Readiness of the System for Change**

It is important to avoid initiating change processes too early, with a higher risk of failure because the conveners (and possibly the participants) do not understand the system. Understanding the readiness of the system for change will allow transformative spaces’ outcomes to be more easily adopted or even institutionally embedded outside the group of participants (Westley et al. 2017).

**Guiding questions per phase**

**Problem Definition Phase**
- What are the purposes and goals of your project?
- What is the problem addressed?
- Why is it a problem?
- What are the conflicting issues or different perspectives of the problem?
- What change do you expect during the course of the convening process?

**Operationalisation Phase:**
- Who do you need to have in the space?
- What are the dynamics between these actors?
- How do you engage and motivate actors to participate in the process?

**Tactical Phase:**
- What were the specific facilitation tools you employed or created to enable the co-design process?
- Why were these employed? How did they help to address the types of issues raised?
- What conflicts/confidential issues/confusions emerged and how were these dealt with?
- What was the impact of the tools on the process?
- What tools did you use to evaluate the impact of the process?

**Outcomes Phase:**
- Where the expected outcomes met?
- What were the unexpected outcomes?
- What changed as a result of the project at the individual level, the collective level and at the systems level?
- How do changes at individual, collective and systems level interrelate?

**Reflection Phase:**
- What are the remaining unknowns?
- What worked? What didn’t work? What were you expecting to be able to change and what did you actually change?
- What is the role of power dynamics/representivity in transformation?
- Why would you call your project a transformation?
Do you know the feeling of being so completely absorbed by an activity that it seems as though nothing else matters? The creative zone, when it is clear what are the next steps you have to take, as if you didn't even need to think about them, as if they were the only logical next steps anyone could take? Well, this state is called flow - a highly focused mental state of concentration on the present experience.

Flow was first researched by Mihály Csíkszentmihályi, a Hungarian-American psychologist, one of the founders of positive psychology. He came to understand the significance of the flow state as a result of his long-standing interest in finding out what makes a happy life. As a child he had seen many adults around him who were struggling to get back on their feet in the aftermath of the second world war, being unable to find contentment in their lives. He was curious about what makes life worth living, so he turned to philosophy, religion and eventually psychology to find answers. His studies made it clear to him that happiness is an internal state of being, and it is a result of committed effort - people were enjoying themselves the most when they were immersed in the present experience.
What is Flow?

Csíkszentmihályi interviewed athletes, musicians, artists who often experienced this state of mind, regardless of the type of activity. Through this research he identified eight components of flow:

1. **A Challenging Activity that Requires Skill**
   For an activity to be potentially enjoyable, it needs to pose a reasonable challenge, so we don't get bored or apathetic and at the same time we need to have the proper skills, so we don't get frustrated and anxious. It's important to note that neither the activity nor the skill need to be physical - reading for example is a perfect example, as it needs concentration and one must know the rules of written language and how to manipulate symbolic information.

2. **The Merging of Action and Awareness**
   When we are using all our skills to cope with a challenging situation, our attention is completely absorbed by the activity - we are only focusing on the information the activity offers. Therefore we become so involved in that activity that we stop being aware of ourselves as a separate entity.

3. **Clear Goals and Feedback**
   The reason it is possible for complete involvement to occur is that the goals are clear and we get immediate feedback. Lacking them we might lose interest or get stressed, as we cannot be sure that we are doing the right things or that we are doing them in a good way.

4. **Concentration on the Task at Hand**
   When being in the flow, we forget about other aspects of our lives, including all unpleasant ones as well, as the level of concentration required leaves no room for unrelated thoughts. In our everyday life we are often prey to thoughts and worries that interfere with the smooth stream of psychic energy experienced in flow.

5. **The Paradox of Control**
   Flow is often described as a state of having control over the tasks at hand - this makes sense as the level of challenge and skills are balanced, so we feel we have a reasonable chance for success. Interestingly, some situations can become flow-inducing, even addictive, where the objective level of control is very low, such as gambling. But the sense of being part of a world where we are in control is one very basic element of an enjoyable activity.

6. **The Loss of Self-consciousness**
   In normal life we spend a lot of time thinking about ourselves, our own self, which consumes a lot of psychic energy, as we often feel vulnerable and need to bring the image of ourselves back into our awareness. But in flow, we can forget about ourselves as a separate entity, which can lead to a feeling of union with the environment, almost like a meditative state.

7. **The Transformation of Time**
   When being absorbed in the present experience, the normal flow of time seems to be distorted or rendered irrelevant, as our actions are governed by the inner rhythm of the activity as opposed to the objective references we normally use, such as night and day. Hours can pass as fast as minutes, creating a sense of timelessness.

8. **Autotelic Experience**
   Finally, the key element of an optimal experience is that it is an end in itself. It is intrinsically rewarding, so we don't need any external motivator to do it - we do it because we like it, because it makes us feel good. The flow experience is not necessarily good in itself - only in as much as it has the potential of making life more meaningful and enhancing the perceived complexity of the self.
Flow experiences lead to a more complex view of the self: the integration and the differentiation aspects of complexity are combined in this experience. Differentiation refers to a movement towards uniqueness while integration is about becoming more united with one's self, others and the environment. Flow offers both: by overcoming a challenging task, the person feels more skilled than before and at the same time in deep concentration consciousness becomes unusually well ordered, as thoughts, expectations, feelings and senses are focused on one goal. Flow makes our present moment more enjoyable - and at the same time it makes us feel more capable of making significant changes.

Creating the conditions where flow is more likely to occur can help your learners to experience this joy and personal growth, as well as create the motivation to act. This means i.a. decreasing the risk of interruptions, letting actions be voluntary, giving options to find the right match of challenge and skills. Flow often occurs as a happy accident - but we can make people more prone to these accidents.

It Makes Sense

I heard about flow theory already in my childhood, but I didn’t really think about it until I went to university. Studying psychology, we learned about several aspects of the human mind, behaviour, development and a lot about problems occurring during that development. That’s why when we reached the humanistic approach and especially positive psychology it was a relief to finally think about human existence in a positive light as opposed to the mechanistic or problem-based approaches (despite all their merits). Flow made complete sense to me: it was something I implicitly knew, had seen working in everyday life.

One occasion that comes to mind was when I was working with mentally handicapped people. I lived for a year on a farm, living together as a community with people with different mental issues. Anxiety was an everyday occurrence, as often it was difficult for some of these people to manage the mundane tasks of the household. But every once in a while there was a perfect match of task and person.

One evening a young man, often careless about the quality of what he was doing, was asked to wash up after dinner, including cleaning the greasy baking pan. He spent around 30 minutes scrubbing that pan, completely in the zone - he was very much able to do it, the goal was very clear and the results were immediately visible to him. He was able to get lost in that experience and the only thing that mattered was to make the pan spotless. Afterwards he was very proud of himself. This example demonstrated to me how the flow state is accessible to anyone, it doesn’t depend on any specific level of intelligence or type of activity. Regardless of culture, social class, age or gender, enjoyment is experienced in the same way.

The Transformative Edge

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References


Conventional pedagogy designed primarily for knowledge transfer is of limited use in a context of transformative learning, not least because it presupposes that there is an incontestable body of knowledge waiting to be transferred. This is of course still important; but for transformation to take place, the learners - both participant and facilitator - need to be engaged in co-creating the knowledge most relevant to the person/people, the time, and the place.
Paulo Freire was born in 1921 in Recife, in one of Brazil’s poorest regions at that time. From a young age, Freire was interested in educational processes. He started to work within education after resigning from Law, his original study focus. He worked i.a. with alphabetization projects in rural areas (Freire 2018). He believed that changes towards a more just and equal society “would come through education and not by means of an armed bloody revolution, which showed little respect for other people” (Freire 2018: xvi).

In his writing, Freire rarely used vocabulary that is associated with transformative learning (Taylor 2017: 21). However, he writes about transformation and how individuals can become active while liberating themselves from societal structures that oppress their way of thinking and being (Freire 2000)(eds. note: see chapter on Theater of the Oppressed). Accordingly, his view on transformative learning is also called emancipatory learning.

Other than most others, Freire does not see transformative learning as an exclusively adult learning process. Within his book Pedagogy of the Oppressed he strongly criticizes educational approaches in which school students are only seen as information receivers. He refers to it as a “banking concept of education” (Freire 2000: 72). Within this type of education the teacher is considered to know everything and is the narrator and the student knows nothing. Knowledge is seen as something fixed that can be transferred from one to another. The student is evaluated by how much of the narrated content s/he can memorize without taking into account whether this knowledge has actually been understood (Freire 2000). Freire reasons that this type of education ignores the fact that reality is constantly transforming and is being constructed within individuals. The new information is not combined with pre-existing knowledge, it is not being questioned and there is no reflection about it (Freire 2000: 72). Freire even calls such educational approaches “dehumanizing” (Freire 2000: 75) and argues that the effects on the learner are severe:

*The more students work at storing the deposits entrusted to them, the less they develop the critical consciousness which would result from their intervention in the world as transformers of that world. The more completely they accept the passive role imposed on them, the more they tend simply to adapt to the world as it is and to the fragmented view of reality deposited in them.*

Freire 2000: 73
B. Theories

— Pedagogy

— Paulo Freire – Emancipatory Learning

Within the transformative learning process according to Freire, the understanding of ‘self’ is transformed from an object to a subject. When people feel like an object, the world and societal structures are seen as realities. These have to be accepted and one has to adjust to them (Shaull 2000: 32; Novy 2007). When people start to ‘read’ the world, they analyse societal structures and recognize that society is a social construct, which is created by humans and accordingly can also be changed by humans (Novy 2007). The world in this case is not static and something that has to be accepted, “rather, it is a problem to be worked on and solved” (Shaull 2000: 32). When people take the opportunity to actively create society and to make a difference through acting, then they are ‘writing’ the world (Novy 2007: 39).

In summary: through becoming conscious of the structures of the world and the worldview and our assumptions and beliefs about it (interpersonal) and about ourselves (intrapersonal), we transform the picture of the world and the role that we are able to play within it (Novy 2007: 29).

From Object to Subject

Paulo Freire was a great inspiration for me as an educator as well as a person. For example, the view of knowledge as an “entrusted deposit”, as Freire puts it, had a large effect on how I see our educational system and how I see myself as an educator.

Many students come from an educational system where they had a very passive role. This has to be taken into account when creating learning processes. It might be necessary to transform their own understanding as a learning person from being passive towards actively engaging in knowledge creation. However, this is not always easy and might need some time. It might be necessary to inspire and to provide experiences where students see themselves as creators of the world again.

Freire also inspired me as a person: Especially in times like today it is easy to say that things are the way they are, because the system is like it is. BUT, we create our societal structures and accordingly they can also be changed by us.

A Transition for the Educator

References


The most important word is the smallest: ‘for’. Education for Sustainable Development. Since sustainable development is of necessity transformational, education for sustainable development must equip learners for transformation.

This has not always been recognized. ESD did not spring up overnight at the inception of the UN Decade of ESD (2005-2014); rather, in many countries, it evolved from a school subject called Environmental Education, where the initial emphasis was on teaching about the environment (= nature) rather than equipping learners to contribute to solutions to the escalating crises.

Now, however, it is widely acknowledged that ESD needs to address not only ‘environment’ but indeed every one of the 17 UN Sustainable Development Goals (ref); and to do so in ways that empower learners to co-create and implement new responses to rapidly shifting challenges, both global and – most importantly – local, and indeed personal.

A pedagogy for ESD is thus a pedagogy of empowerment (ref Mehlmann & Pometun); the competences required of educators closely mirror those described in this book, and so do the theories and methods.

‘Teacher knows best’

The transformative edge in ESD resides in the recognition and acceptance that the educator’s role is not to supply solutions: not to ‘know best’.

All transformative solutions need to be co-created with and by learners. Not only because it is empowering to craft one’s own solutions, but because quite literally no-one can know what a sustainable future might look like. Each situation, each challenge, calls for hand-crafted, collaborative visions, strategies and solutions. The single most important question in ESD is: ‘What kind of future do we want to live in?’
Behaviour Change

Beyond such existential questions there are, at least regionally, certain aspects of modern living that unequivocally need to change if human civilization is to continue. It has for example become a truism that ‘we’ in the affluent sectors of society should reduce our environmental footprints, notably by reducing energy use and food waste. How each person, in their given context, might achieve such reductions varies considerably, and may contain elements of technology and infrastructure; but at the heart of this particular challenge is the question of personal behaviour change.

Persuading or, better, empowering people to undertake long-term, sustainable behaviour change is indeed an exercise in transformation. The learner who consciously sets out on such a journey will gradually call into question multiple aspects of her or his lifestyle, and will gain in self-knowledge. On the other hand, it is often assumed that the requisite changes can be ‘induced’ in unaware citizens, by for example legislation, information campaigns, or other forms of nudging.

In the larger context of sustainable development, it is clear that, while nudging can play an interesting role, it is limited to those specific behaviour changes on which there is sufficient consensus. But such examples are few in relation to the overall need for societal transformation in an age when social structures as well as ecosystems are breaking down, and financial systems are so out of date that they promote this breakdown to the detriment of all but a tiny minority of humankind. The challenges of sustainable development can only be adequately met with a concomitant growth in conscious, transformative lifestyle changes.

Is it even possible?

It is frequently claimed that wide-scale behaviour change is impossible to bring about. ‘You can’t teach old dogs new tricks.’ This is however obviously untrue. Lifestyles in affluent societies have changed dramatically over the past few decades, to the benefit of convenience but to the detriment of natural resources (ref Planetary Boundaries), and of almost all other species (ref Extinction Crisis). This has been deliberately engineered by commercial interests and targeted legislation.

The question, then, is how to bring about conscious, sustainable behaviour change.

My own introduction to this seminal question came in 1989, when I met a group led by David Gershon, Bessie Schadee and Robert Gilman who were intent on developing a self-study programme for adults focused on sustainable lifestyles. Suffice it to say that 30 years later the programme we developed has reached millions of people worldwide and continues to evolve and disseminate. The stories and anecdotes of transformation are legion, and continue to inspire.

The model used, documented in the chapter Behaviour Change, is rooted in action research (qv). It could benefit from further research. For example, the most successful examples all include group (empowering) coaching. What is the optimal balance between different learning modes, and between different levels of coaching or facilitation? Experiments with 100% online programmes have not yet been very successful, but no doubt there is still a lot to learn for educators to become more effective.

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See also chapters:

B. Behaviour Change
B. Critical Thinking
C. Empowering Coaching
C. Empowerment Spiral (?)
An Empowerment Spiral

Marilyn Mehlmann

Building on the work of David Gershon and Gail Straub (ref), a global network of practitioners has since the 1980s been conducting action research to develop a descriptive model of how personal and group empowerment actually happens and leads to verified, long-term behaviour change.

The model has a spiral form, in contrast to a conventional linear behaviour-change model highly prevalent in many spheres from marketing to education:

In this linear model the behaviour change is expected to take place when new knowledge is acquired. It all seems very logical. But we also know that it’s a poor model of reality. We inform and inform, for example about the risks of smoking. If the linear model were an accurate picture of reality, there would hardly be a smoker left in the world today.

In practice almost the opposite seems to be true. Each of us is bombarded with gigantic amounts of information every day, maybe hundreds of thousands as much as we can actually absorb. Somehow, each of us decides what to hear and what to activate.
A Circular Relation

One way to understand what goes on is to view information and action as two elements in a circular or even spiral relationship. The third major element is attention, or caring. It works like this:

- I take in information about things I care about. If I decide to buy an electric bike, I see nothing but electric bikes where I saw none before.
- I care about things I believe I can affect by my own actions. Conversely, things I believe I can’t influence are things I care little about; therefore I take in little information about them.

Sometimes we allow ourselves to care about something despite believing there is nothing we can do about it. This is when we acquire a bad conscience: we take in information but because of our beliefs (whether correct or incorrect) are quite unable to activate it. For instance, many people feel they should use the car less (but then I’d never get all my work done…) or should send money to Amnesty (but there are so many other things I need the money for…) or should spend more time with their parents (but then I’d be neglecting the children…), and so on.

This is a really interesting condition. On the minus side, it takes a lot of time and energy to maintain a bad conscience. On the plus side, it opens up a possibility for change.

The model is widely used in the design of sustainable behaviour-change programmes, building on the observation or belief that a desire to live more sustainably is ‘locked into’ many people and can be liberated via individual and group empowerment. It thus forms a good starting point for developing empowering facilitation and coaching skills as well as forming the basis for a pedagogy for Education for Sustainable Development empowering students to take personal and collective action (refs).

The spiral model turns many conventional educational models on their heads. Not least, it indicates that one of the more successful entry points for transformation can be an invitation to experiment.

From kindergarten to university - and parents

ESDA - Education for Sustainable Development in Action - was a highly ambitious 6-year project to establish ESD in schools in Ukraine. Leading the project was an NGO hosted by the National Academy of Pedagogical Science. Each year it set higher ambitions, and each year it surpassed its goals. Finally, it became and still is a world leader when it comes to disseminating ESD in state schools, with over a quarter of a million pupils taking part and 5,000+ teachers trained. The course materials - from kindergarten to Grade 10, plus some additional material for university students and for teacher trainers - built upon and contributed to the spiral model of empowerment.

By popular demand, the school materials were complemented with a self-study book for adults, particularly parents, and a coach manual for group coaching.

The materials are available online in Ukrainian. For an infographic showing the results of an evaluation study by the National Academy of Pedagogical Science.

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See also chapters

B. Education for Sustainable Development

B. Empowering Coaching and Facilitation

Prof Olena Pometun
Action Learning

Ursel Biester

If you have ever given a learning group a practical challenge to solve, where they had to learn on the way how to do it, and afterwards you asked them to reflect upon their insights, then you have applied action learning.

Action learning is an approach to learning that builds upon problem solving. It is not purely theoretical: it involves taking action and reflecting upon the results. This helps improve the problem-solving process as well as simplify the solutions developed.

The theory of action learning was originally developed by Reg Revans, who applied the method to support organisational and business development and address problems more effectively. His methods have subsequently been applied not only to group learning but also to individual learning.

Revans proposes this formula: $L = P + Q$

where $L$ is learning, $P$ is programming (creating a programme where learning can happen, traditional instruction) and $Q$ is questioning to create insight into what people see, hear or feel.

The action learning process includes:

1. A real problem that is important, critical, and usually complex
2. A ‘problem owner’ - individual or group
3. A process that promotes curiosity, inquiry, and reflection
4. A requirement that talk be converted into action and, ultimately, a solution
5. A commitment to learning

In most forms of action learning, a facilitator is included and is responsible for promoting and facilitating learning, as well as encouraging the group to be self-managing.

To freely speak with Reg Revans: The organisation that continues to express only the ideas of the past is not learning, and education systems committed to conveying existing knowledge may do little more than make participants proficient in yesterday’s technique. Thus learning cannot be solely the acquisition of programmed knowledge, however important. When no-one can predict the needs of tomorrow’s world for knowledge and skills, no-one can tell what stock of programmed propositions is most relevant; educators can do no more than offer their own selections.

We can know only one thing with certainty: the future will not be like the present. We will all be caught up by the currents of change, and swept into new unknowns no previous generation has lived through and explored. Only active, situation-based learning can help us navigate those uncertainties.

Action Learning thus builds on some form of action research (see separate chapter), no matter how modest. “The distinctions drawn in academia between research, action, learning and communication are highly artificial, if not knowingly misconceived. There can be no effective action without learning, and no effective learning without action.” (Reg Revans, 2011)
A Positive Approach

The emphasis in Action Learning is on the positive: what is working well, and how it might be improved or might need to adapt to changing circumstances. This is consistent with the principles of positive psychology (Seligman and Csikszentmihalyi) and Appreciative Inquiry (Cooperrider and Whitney) by encouraging individuals and groups to build on strengths and learn from life’s challenges. There is no need to dwell on failures; the focus is on inventing better ways of acting and going forward.

In Action Learning, questions allow group members to “step out of the frame of the prevailing ideology” (Otto Rank), reflect on their assumptions and beliefs, and re-frame their choices. The process of “stepping out” of a frame, out of a form of knowing—a prevailing ideology—is analogous to the work of artists as they struggle to give birth to fresh ways of seeing the world, perspectives that allow them to see aspects of the world that no artists, including themselves, have ever seen before. This broadening of perspective is one of the key entry points to transformative learning.

Personal Experience

When I was working at a consultancy company we ran an internal education programme, teaching Design Thinking to employees. We always took care to make the homework relevant for their actual work. For example, one team had to go to a conference and present a product, so we challenged them to design this presentation in a way that captured the principles of Design Thinking. They came up with a game they played with the conference participants which not only demonstrated the product, but was also engaging and fun and fostered a good atmosphere among participants. Needless to say they were very proud, and they had learned about Design Thinking by doing.

I enjoy action learning programmes because they allow participants to engage with material they would be covering anyway, for their jobs or other aspects of their lives, but now approaching it with fresh eyes. It makes the learning relevant to their work, raising motivation to engage with the new material.

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Suggestopedia: The Theory and its Practical Implications

Lonny Gold

My encounter with Suggestopedia in 1977 was a momentous one. And it all began on an elevator. I had come to observe a Suggestopedic French class in a government training facility in Ottawa. The Canadian government was using the Suggestopedic method to teach French to English-speaking government employees. On the short ride from the ground floor up to the sixth floor I was able to witness two English-speaking civil servants from the western Prairies having an argument in French.

“I am a Louis XV dresser and my legs are much more beautiful than yours!” attacked the first man. “Yes,” replied the second, “but I am a Louis XIV four-poster bed and you can’t imagine what goes on, thanks to me, at night!” That did it. I hadn’t yet observed my first Suggestopedic class but I was already sold on the method!

What it is

Suggestopedia was originally created by psychotherapist Dr. Georgi Lozanov.

Based on his principles, a team of philologists, led by Aleko Novakov, created a methodology for foreign language teaching, wrote textbooks for this and ran Suggestopedic courses. The outcomes of the teaching process were reported to the Bulgarian government and a decision was made to launch a Scientific Research Centre of Suggestology in Sofia in 1966, which became the Scientific Research Institute of Suggestology in 1971. UNESCO recognized suggestopedia as a superior teaching method in 1978.

The aim of Suggestopedia has always been to activate the reserve capacities of the mind by creating a stimulating environment where students feel safe enough to let go and take risks without any fear of criticism or ridicule.

To my mind, there are four main principles that characterise Suggestopedia:

- No shame or guilt must be experienced by learners when errors are made
- Every piece of information must have emotional meaning and pertinence
- Important information should be largely hidden so that it is only perceived by students peripherally
- Assimilation must precede analysis
1. Fear, shame and guilt are instilled in students by teachers who are afraid of losing control. These have never helped anyone learn anything. In fact, they inhibit learning as fear results in the release of adrenaline and cortisol and these prevent blood from flowing to the neocortex. This mechanism is key to our survival. If a bus is coming at you, the important thing is to get out of the way, not to finish thinking through Einstein’s Theory of Relativity. Blood flow is needed to the legs, not to the brain. When people feel they are in danger, they stay on their guard in anticipation of the next threat to their safety; this state of alertness prevents them from relaxing enough to absorb new knowledge.

2. Long-term memory is receptive to feelings and emotions, typically joy, sadness, fear, anger and surprise. Powerful experiences will trigger these emotions and will be retained more easily than abstract information. A good teacher will therefore imbue important knowledge with positive and pleasurable meaning that learners will enjoy thinking back to. (Which do you remember more clearly: Your last summer holidays or the administrative work you did last Tuesday?)

3. More surprising is the fact that direct perception only makes it to short-term memory and this memory operates like the blackboard in a traditional classroom: as soon as one lesson ends, the new teacher erases what was on the board previously to make place for new information relevant to the new lesson. If I ask you what you were wearing yesterday or even three days ago, you will probably be able to remember. If I ask you about what you were wearing on 17 November, however, there is little chance that you can recall this. Short-term memory generally lasts for three and a half days and then, according to current neuro-scientific thinking, either gets repackaged by the hippocampus for long-term memory or begins to fade into oblivion. It is at this point that long-term memory kicks in and takes over. The implications for Suggestopedic teaching are twofold: A) Everything must be simultaneously taught for both direct and indirect perception (examples below), and B) The teacher must first organise what will figure in the lesson and then scrupulously hide it – usually by distracting students with other less essential material.

4. Analysing material students have not yet integrated emphasises how complex the material is and how difficult the task lying ahead is. This could well put a fear of failure and psychological block in place. Analysing things that have already been assimilated, on the other hand, gives students tangible proof of how intelligent they are – which is always gratifying and reaffirming. It is critically important to do things in the right order!
Most Suggestopedic classes use a text as their starting point and in language classes this text will probably take the form of a dialogue, with twelve or fourteen characters. Each student will be given the role of one of these characters. These personae will act as a symbolic mask for learners; those with negative self-image will allow themselves to succeed at something without this success disrupting their sense of who they are. Protected by their new fictitious identity, they feel free to succeed without betraying other people's negative expectations of them, and perhaps even losing them as friends. The new identities serve a further useful function: Each persona is designed to embody a sound which is typical of the target language, and this reduces the need for tedious pronunciation exercises. An example would be "Peter Reeves, of Thirteen Regent Street in Leeds," who just happens to be an "Engineer".

The page layout of a language text is special. On one half of the page you have the target language and on the other half, just opposite it, you have the mother-tongue translation. This is helpful for weaker learners and gives "official confirmation" to stronger ones.

The text is then recited to a recording of Classical or Romantic music, written between 1750 and 1850. As this style of music is a succession of different moods or feelings, the teacher is emotionally coding every utterance, thereby packaging information for long-term memory. The students, meanwhile, are following the text visually and this caters to the needs of short-term memory. In the hope of reinforcing this process, I personally have instituted the practice of having learners highlight words and expressions they find the most interesting, thus personalising their texts.

An Encoding Session then ensues. The teacher goes through the text giving explanations and weaving associations. For example "Monday" is the day of the Moon, "breakfast" is the meal when you break your fast, many words in English that begin with "s" are French words where the "é" has been replaced by an "s", etc. This segment should have the magical quality of telling children a bedtime story – and if well done, it should be as unforgettable and trigger a childlike sense of wonder.

About 70% of a Suggestopedic course will be a quick succession of activities involving games, sketches, music and the arts in general – and activities will range in intensity from the meditative to the boisterous. There will be lots of physical movement, and variations in sub-group sizes, giving the feeling of an ever-evolving organic process. There will also be preparation phases, where the most recent grammar and vocabulary are woven together into sketches and skits for the performers to take ownership of the new material and for classmates to enjoy.

The Relaxation concert is read to fairly complex, High Baroque music made up of three or four voices. As the rational mind cannot take in so much interwoven input, it lets go. This brings about a change in cerebral activity, with brain waves going from lower Beta waves (18 – 23 Hz), where people are productive, to Alpha waves (8 – 12 Hz), where they are receptive. This brings about a drop in body temperature, a reduction in heart and pulse rate and a slowdown in breathing. This is a state that precedes falling asleep, it can be accompanied by hyper-sensitivity and it is particularly conducive to deep learning.

Phase Encirclement is another notion central to Suggestopedia and it refers to the fact that in different physiological and emotional states, the same input will be experienced in different ways. But these states are in constant flux. And this is where Pavlov's theory of "paradoxical states" comes in. This theory claims that in certain states, strong stimuli can induce weak responses (through inhibition) and weak stimuli can spark strong reactions, (through amplification - particularly in states of hyper-sensitivity). This inversion is important to bear in mind in Suggestopedia, where material should be presented not only explicitly but also implicitly: where information comes to us peripherally, through the corner of the eye, in a barely noticeable way. In this way, a variety of future states have been planned for and teaching has directed material to different levels of consciousness.
Who is it for?

Out of some 3000 students that I have had over the past 42 years, it hasn't worked for two of them. One was a computer engineer who believed that success should only be a reward for hard and laborious work, and he felt that learning effortlessly was akin to cheating. He experienced my classes as an attack on his moral values. And then there was a very nervous lady who wore lots of bracelets on her arms and went into an absolute panic when asked to relax. The Baroque relaxation concerts were a real ordeal for her – and for everyone else – as she shook and trembled and sounded like a bus or street-car clanging away for everyone to get out of the way.

For me, Suggestopedia would have been a life-saver in my school days. As a kinaesthetic learner, I was in a constant dilemma: Should I keep my body in motion, stretching and squirming to the great irritation of everyone else? Or should I focus all my energy on sitting still, which required all my attention, and left me with no spare capacity to actually learn anything. One teacher complained about my never doing things the way everyone else did. "When I tell the class to scratch their left ears," he told my father, "everyone raises their left hands and scratches their left ears. Lonny raises his right hand and reaches over his head to grab hold of his left ear." Sadly this was 1952 and I was 5 years old. And I was unable to explain my need for cross-lateral body stimulation to harmonise the activity of my two brain hemispheres.

Later in my hapless student career, I would systematically lean back on my chair and rock back and forth on its two back legs. This was a sure fire recipe for driving any teacher mad. And they never understood that I was totally on their side! I was just trying to set in motion the fluids of my internal ear to stimulate my brain and help me learn faster.

Frontiers of Freedom

We could postulate that in this society, where every computer click is tracked and recorded, and where cameras trace our physical movements without our knowledge or consent, our freedom is actually severely limited and often just an illusion. If this is so, the last frontier of real freedom may well be the unconscious mind and the imaginative resources it can set into motion. It is on Suggestopedia and similar approaches that address the "whole person" that we should be placing our bets. The way forward can only be to develop learning systems that make life a truly exciting and fulfilling adventure and allow us to become what we were meant to be, in accordance with our deepest aspirations.

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C. METHODS

Many different methods and methodologies can be and are used for facilitating transformation in learners. This book is not a self-study course but an introduction and a necessarily incomplete overview. Perhaps you will find inspiration to experiment.

Each experienced facilitator develops her or his own version of a multi-purpose toolkit - a kind of ‘Swiss army knife’ for transformative learning, adapted to circumstances. One of the criteria used when selecting methods for inclusion is that it should be possible for an experienced facilitator to try them out without specialized training - though indeed for most of them, training is available.
Self-knowledge

Personal empowerment, including for instance Life Design, The Work and Deep Listening, is foundational to transformative learning.

Personal empowerment is not the same as psychotherapy, and a participant who signs up for a learning experience is not necessarily interested in or ready for therapy. The key for the facilitator is to respect at all times the need and the ability of each participant to frame their own needs, objectives, and paths. The facilitator has no a priori concept of what the outcomes should be for each of their participants; only a wish to support them to become more active and engaged citizens, in whatever way and to whatever extent they themselves choose.
Caitlin Frost
This is about transforming limiting beliefs using The Work of Byron Katie.

As a long-time global practitioner of collaborative and participatory work in community and organisations, and as a lifelong practitioner of personal transformation work, I have come to see the important connection between the two. As we step in to attempt to lead and participate in meaningful dialogue and co-creative work across our differences, we find ourselves in high levels of uncertainty and vulnerability that can quickly and unconsciously activate our fear-based, self-protective thinking, our assumptions and biases, and our attachment to control and being right. The amount of curiosity and ability to learn and change that we need to bring to these situations is high, and often our actual capacity to do so is dramatically lowered by the limitations of our own thinking and beliefs.

The Work (of Byron Katie) is a powerful and accessible tool for identifying and inquiring into the limiting beliefs and stressful thinking that can cause us to become reactive or stuck and shut down. It can be practiced with a peer-facilitator, a professional coach, or as a self-facilitated written exercise. This makes it very accessible.

By working with specific, real situations from our own experience, we can learn to identify and understand our own thinking and patterns more clearly, and to actually transform our own beliefs and the patterns of emotions and reactions they are connected to. This enables our system to access our deeper capacities for learning, connecting, and healing, as well as imagining and activating creative possibilities, even in situations that can seem intractable.

Applied to specific challenging situations, The Work can help us to access new perspectives (about ourselves and the situation) and shift from a stuck position and/or emotional space. As a practice over time, The Work can help us illuminate and transform underlying patterns of thinking, emotion and action, and actually shift our way of thinking and responding to be more resourceful and creative as new challenges are encountered.

While there are many effective and fabulous methods for working with groups of people and supporting good learning and communication, the effectiveness of such methods relies also on the state of mind and presence of the leader/facilitator and the participants. As a facilitator of collaborative process, I know that it is important to be aware of how I use my power and exert control in order to allow space for the group to find and experience their own wisdom and to hold a space open for emergence. That said, if I am feeling threatened by levels of discomfort or conflict in the group, or attached to particular outcomes or levels of approval, or carrying judgments about particular people or perspectives, my own underlying beliefs and associated patterns can take over my intentions and knowledge and I can unintentionally shut down the space and even sometimes do harm. As a person holding power in a role of facilitator I consider it my responsibility to have a rigorous practice of working with my own beliefs and patterns, being attuned to my own reactivity or stuckness and to any feedback I receive, and using The Work to inquire and grow myself in these areas.

While it is valuable to set intentions for openness, respect and equality, and to gain knowledge in these areas, I believe we also need powerful practice to engage the underlying patterns that can override these intentions and learnings; that we need to identify and transform the underlying patterns that hold in place misuse of power and control, judgement and bias or that hold us back from deep learning, connection and contribution.
I use The Work regularly in my own practice in both my personal and professional life. I teach and facilitate The Work as a core practice in ‘Art of Hosting Meaningful Dialogue’ training and as part of leadership development programmes I co-lead in the non-profit and higher education sectors in North America, as well as in some business settings. In the programme evaluations, participants often speak to the transformative impact of the practice in their leadership, work, and additionally in their personal lives. They share stories of dramatic change in relationship dynamics, innovative thinking, and finding the courage to step into new roles and communicate with more clarity and courage. I have found this practice, when well introduced, to be accessible and resonate with a wide range of people, whether or not they have previous experience and comfort with reflective practices.

My own use of The Work has enabled me to work positively with a much greater diversity of people, and to collaborate and learn from a much wider diversity of perspectives. By naming and inquiring into my own assumptions, judgements and fears, I am able to be more present, open and curious in situations that in the past I would have avoided or reacted to. I can step into much higher levels of uncertainty because I know I have a practice I can use to grow and re-find my centre in that space.

Integrating The Work into Facilitation Practice

Doing the Impossible

A few years ago, a colleague and I were asked to facilitate a three-day meeting with representatives from two levels of government and multiple community-based organisations. It was to be about a highly charged and important conversation concerning the health and wellbeing of children in the community. We were told that this was the fifth attempt for this group to address the issues, that the last four meetings had dissolved in conflict, and that the facilitators had quit or been fired. It seemed like an almost impossible set-up, and we were quite stressed hearing the details, but we decided to take the job because we cared deeply about the topic.

While the group dialogue methods and facilitation experience we brought to the session had some value, the most valuable preparation time we spent was using The Work to identify and inquire into our own stressful thinking, fears, and assumptions about the meeting and the people. We could see and feel how our ability to stay curious and present (and non-reactive) was so deeply served by doing The Work ahead of time; we were able to hold a safe and receptive space, and adjust our plans moment by moment with beautiful attunement, as people argued, stormed out, came back, raised voices, listened and over time leaned into some important and transformative dialogue together. It was a challenging but truly beautiful experience, that I believe would have been intensely stressful and likely less successful had we not taken the time to do our own preparatory Work in this way.
A Simple Structure

While we are often told it is important to be present, have an open mind, not take things personally and consider perspectives different than our own, the actual HOW of doing this is often elusive, and is particularly difficult to access when we experience stress and high uncertainty.

The Work, founded by Byron Katie, has a simple, clear, repeating structure that gives us a way to work directly and effectively with our own thinking by focusing on specific situations where we find ourselves experiencing stress, reactivity or feeling stuck and inquiring.

Step 1 of The Work is to Identify a very specific, genuine situation; to picture that situation and let yourself experience the stressful feelings. Then identify and write down the immediate stressful thoughts. The point is not to censor or be wise – this is not the time for positivity and re-framing! You allow this part of your time for positivity and re-framing. 

Step 2 of The Work is to inquire into that belief, with that specific situation in mind, using the simple and powerful Four Questions of The Work. You are invited to slow down to a reflective mindset, and allow insights, information and perspectives to emerge in answer to the questions. You can do this part as a reflective writing exercise or work with a partner who asks you the questions, holds space and listens (but importantly does not advise or converse.)

The process can be moving, informative, healing, humbling, painful, humorous and radically pattern-shifting and life-changing when applied as a practice. Its simplicity of form can be deceptive and is in fact part of its power to shift our way of thinking.

The Four Questions of The Work

With a specific situation in mind, and one belief identified, reflect on each question and allow answers and insights to emerge. There are no “right” answers and it is not intended to provide a ‘solution’ to the ‘problem’, but rather to open your mind.

Belief: __________________

1. Is it true? (yes/no)
2. Can you absolutely know it is true? (yes/no)
3. How do you react, what happens, when you believe that thought? Notice your emotions, sensations, reactions, images, how you treat that person and yourself; what does it stop you from being able to do when you believe it?
4. Who would you be in the same situation without that thought? This is an experiential question. How does it feel without the thought? What do you notice?

Turn it Around

Open your mind to more perspectives. What else could be true beyond your one belief?

Finding specific, genuine examples This is about opening your mind to more possible perspectives that can bring you helpful insights, not about condoning or self-blame. Here are some of the ways to do that:

Opposite: He does value me.

Find specific examples from the situation where this has some truth.

Other: I don’t value him. Where am I not valuing him? This supports me to align with my own values and see places where I can be empowered to shift the dynamic - not self-blame.

Self: I don’t value myself. Where am I not valuing myself in this situation? This supports me to align with my own values and see places where I can be empowered to shift the dynamic in myself - not self-blame.

Take some quiet time when you complete your inquiry as your mind will continue to open and work. If you find additional beliefs as you inquire, you can write them down and do The Work on them one at a time. For more detailed information on applying The Work, see Resources below.

The Work, has many applications to all areas of life and work. There are experienced practitioners around the world applying the basics of the practice in innovative ways in education, healthcare, innovation and organisational work. What we believe and how we think plays a huge role in so much of what we are capable (or not capable) of doing and being. The Work gives us a profoundly powerful and highly accessible way to work with our own thinking and our own minds in deeply transformative ways.
Irene Nolte

Joanna Macy, the founder of the Work that Reconnects (WTR), is a scholar of Buddhism, general systems theory, and deep ecology. In the late 1970s, at the peak of the Cold War period, she was increasingly concerned about nuclear weaponry and the dangers posed by nuclear power. The workshop, which initially was called “despair and empowerment work”, was founded on the observation that when people share with others their feelings of fear, anguish or despair, their power to act for change is released.

Today the WTR network and its workshops have become a global network that gives participants the opportunity to share their concerns on life on this earth, far beyond the threats posed by nuclear destruction. As a consequence, whereas previously these workshops drew people mainly from the peace, justice and environmental activist movements, today they gather people from all walks of life who are suffering from their awareness of the imminent and absolute crisis regarding life on earth.

The WTR is a place for inspiration, sharing, gaining hope, in order to regain strength as a way out from exhaustion and despair. It is equally a place in which a shift is possible, to break away from the psychological numbing process, which, from the perspective of the WTR, is prevalent in western society and a primary cause for inaction. The WTR is therefore a workshop that allows participants to gain knowledge, insight and renewed courage in this pivotal time in human civilisation. It actively addresses the question whether life can go on and offers participants avenues to get in touch with their resources to become an active part in this shift, as part of their empowerment.
The key premise of the Work That Reconnects is to help participants see that they are larger, stronger, deeper, and more creative than they have been led to believe. In this way the process seeks to empower and inspire participants to live up to their own potential.

The WTR has evolved into a model that uses counselling methods, spiritual principles, ritual and myth, laughter and tears, reverence and irreverence to help individuals break out of the numbness of despair and denial about the social, ecological, political, spiritual and psychological crises of today’s civilisation. It helps participants to deepen their self-knowledge, by recognising and helping them express and embrace their pain for the destruction of life on this earth. The process also encourages them to recognise their resources and thereby seeks to empower them in redefining existing imbalances.

The pedagogy is clearly outlined and clear steps are given for participants and workshop facilitators, exercises (both individual and collective) are conducted not only indoors but as far as possible also in connection and communication with nature. With regard to the flow, workshop leaders are invited to survey and intuitively monitor the group and its dynamics. This work is both intellectually stimulating, as well as emotionally and spiritually revealing.

With regard to methodoloy it is based on deep ecology, systems thinking, and the resurgence of non-dualistic spirituality. These three streams invite participants to explore their connection to the “web of life”.

The Transformative Edge

Participants are invited to collaborate, within and beyond the workshop, as a way to support the web of life. A key element of the WTR is for participants to envision their role in the shift from the destructive “industrial growth society”, living on unsustainable premises, towards a life-sustaining society in which humanity is working towards sustainable living practices. Whether this shift will happen soon enough, whether humanity can make this shift in time is the great mystery we face, it is without doubt a life lived with uncertainty or how the story will continue.

The pedagogy is clearly outlined and clear steps are given for participants and workshop facilitators, exercises (both individual and collective) are conducted not only indoors but as far as possible also in connection and communication with nature. With regard to the flow, workshop leaders are invited to

Core Assumptions

Here are some core assumptions of the work:

1. Our Earth is alive. It is not a supply house and sewer for the Industrial Growth Society. As most indigenous traditions teach, the Earth is our larger body.
2. Our true nature is far more ancient and encompassing than the separate self defined by habit and Western society.
3. Our experience of moral pain for our world springs from our interconnectedness with all beings, including humans of all cultures, from which also arise our powers to act on their behalf. When we deny or repress our pain for the world, or view it as a private pathology, our power to take part in the healing of our world is diminished. Our capacity to respond to our own and others’ suffering— that is, the feedback loops that weave us into life— can be unblocked.
4. Unblocking occurs when our pain for the world is not only intellectually validated, but also experienced and expressed. Cognitive information about the social and ecological crises we face is generally insufficient to mobilize us. Only when we allow ourselves to experience our feelings of pain for our world, can we free ourselves from our fears of the pain – including the fear of getting permanently mired in despair or shattered by grief. Only then can we discover the fluid, dynamic character of feelings. Only then can they reveal on a visceral level our mutual belonging in the web of life and free us to act on our moral authority.
5. The experience of reconnection with the Earth community arouses desire to act on its behalf, as well as on behalf of humankind.

Source: https://workthatreconnects.org/
Overcoming Fears

The incredible thing about the workshop is the transformation that happens in participants. Initial shyness, worries and distance are soon overcome, based on the simple and interactive exercises that are part of the WTR. Some participants worry about having to speak about “politics”, or “ecology”, and that perhaps they might not have sufficient knowledge. But soon they see that everyone has a view, an opinion, a suffering, “merely” based on the fact of being alive in this time and age.

Those who are afraid of opening up, who are not used to working with their emotions and share their inner world, soon find the desire that who and where they are is just fine.

This workshop humbles me, as a facilitator. It teaches the basics of life- reconnecting to life- to oneself, to one another, to the natural surroundings and the wisdom inherent there. It shows what a powerful anchor and resource the web of life is and the importance of consciously engaging with it: in our joy, in our anger, in our despair, in our renewed courage to take another step in life.

Since the way you are touched by what you bring to your learners touches them as well, I’d like to share with you a part of my own learning journey with Deep Ecology.

A Quest for Answers to the Big Questions

After studying international politics and working in the human rights sector I had a burnout, which forced me to reconsider questions of emotional and physical health. This led me to study shiatsu, the Japanese form of acupressure based on Traditional Chinese Medicine. After some time, I completely pursued this path and decided to dedicate my life to the healing arts.

Several years ago, I travelled in the USA and Canada to visit and volunteer in various ecovillages and intentional communities. I was seeking a way of life that could combine political and healing practices and that could, at the same time, offer some constructive answers to the challenges humanity is facing. It was during this time that I decided to participate in a week-long workshop with Joanna Macy. I had heard of the WTR and wanted to experience it first-hand. It is not an exaggeration to say that the workshop completely blew me away. I had something like an epiphany, suddenly all made such incredible sense and I had finally found a way to combine personal healing work with political and social activism, something that I had been deeply longing for. I find that often people are either socially, ecologically or politically very active, but don’t manage to take good care of themselves, of their inner world and healing; and conversely, at the other extreme are those who engage in extensive self-healing, which is important, but who are no longer socially or politically active. The WTR showed me an avenue to combine the two- self-healing linked to activism- and then and there I promised myself that I would give these workshops across Europe, which I do.

During that time, while I was in Canada I sent Joanna a personal letter, telling her how much the work had meant to me and asking whether I could come and study with her. To my surprise she agreed and so I was invited to stay at Canticle Farm, a permaculture- non-violent communication- meditation- hugely inspiring community in San Francisco and could take part in workshops with Joanna, as well as spend time with her. It was one of the most incredible turnings my life has taken and surely deeply memorable for the rest of my days.

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Life Design

Frauke Godat

Life Design is a Design Thinking approach to career orientation and planning.

There are two threads of Life Design that I am aware of. One is a class and the book “Designing Your Life” which originated at Stanford University in the US. The other is a consultancy concept on “The Future of Work” and a book called “Design Your Life” from a startup in Cologne, Germany.

Teaching at Stanford University, Bill Burnett and Dave Evans have taken the practice of Design Thinking for designing creative solutions to complex problems, and applied it to life planning and job selection. They encourage learners to think like a designer: ask questions, look for allies, make mistakes, build prototypes, and think interdisciplinarily. They empower the learner to become the designer of her or his own life.

Courses and workshops are held in Stanford, Yale, and other universities. There are specific workshop retreats for women’s empowerment.

In a New York Times article, a former student is interviewed: “Emma Wood, a 25-year-old Stanford graduate and a consultant at McKinsey & Company who took “Designing Your Life” as an undergraduate, said the class released the pressure she felt about the life she would face after graduation.”

The The Transformative Edge

Learners are encouraged to think and act like designers of their own life. They do not have to be consumers of jobs created by society anymore. Learners are being empowered to turn society’s needs into new job opportunities while they can live their personal passion at the same time. Furthermore, learners are constantly reflecting and rethinking their personal values, attitudes, and needs in the design process.

At Kiel University, I have used both approaches in a career planning seminar which was a prototype in a national government-funded project for teaching and learning innovations (PerLe – Projekt erfolgreicher Lehren und Lernen, project for successful teaching and learning). Students from different faculties took a seminar for one semester. The encouragement “to think like a designer” from the Stanford approach enables students to use design principles to change their attitude towards life planning. Rather than expecting that the perfect job will be offered to them, they start to create their own jobs, to question society’s expectations towards them, and learn how to build their personal networks according to personal interests and needs. Students engage with these principles through a visualization exercise at the beginning of the semester. A valuable addition to the prototyping phase in a Life Design process is the Job Shadowing tool from the Theory U toolbox.

The book “Designing Your Life” is available in different languages and there is also a workbook: https://designingyour.life/the-book/

Online course (look out for discount periods in the year) and worksheets: https://designingyour.life/resources/

The book “Design Your Life” is currently only available in German. Some video tutorials and worksheets are available online: www.workliferomance.de/design-your-life-buch/design-your-life-buch-videos-downloads/

Like-minded readers from “Design Your Life” can connect and build their network on Facebook: www.facebook.com/groups/1205011906177883/

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Deep Listening™ and Parking

Marilyn Mehlmann

It’s easy to listen – we do it all the time!

Well… we listen – but how do we listen? The quality of our listening has a great impact on the quality of our meetings, and indeed our lives. Different methods are available to improve the quality of listening. This is about one called Deep Listening™ as developed by Warren Ziegler in the 1970s. It helps us not only to listen to others but also to ourselves.

Deep Listening has many uses, not least in helping to elicit our inner images of different futures. Each one of us is capable of holding a large number of different future images; at the very least we will probably have a hoped-for future, a feared future, and an expected future - and we may well have several of each. Bringing these inner images into consciousness can be an important step on the road to transformation.

Indeed, each of us has knowledge that we usually either are not aware of, have no access to, or don’t trust. At some level, we know that we know these things. We talk about gut feelings, about intuition. We may “have a feeling” that things are a certain way. We talk about putting things on the back burner, sleeping on it…

Deep Listening is both new, and a very old tool for coaching. It is about hearing the other (or yourself) without the kind of censorship exercised by experience, expectations and preconceived opinions. The originator, Warren Ziegler, said he was inspired by Taoist practices. He described six modes of Deep Listening. An experienced listener can weave them together or dance between them, but for the beginner it can be good to practice them one at a time. They are:

1. Be silence
   Do not respond in any way to the talker, either with words or with body language. Look away. No eye contact. This is not something you do, not a task but a state of being. Thus, be silence throughout your whole being.

2. Give attention
   This is an early form of the sixth mode, emptying. Focus your entire self on what the speaker is saying, to the exclusion of all else. Her/his words are the only reality.

3. Be empathic
   This is a grand act of the imagination through which spirit lives. Enter the speaker’s story and live it as your own. Feel it in your body, your mind, your spirit, as if you were living her story with her.

4. Be non-judgemental
   A difficult practice when the talker offers images (values, ideas, intentions) in conflict with yours! But essential if you are to allow the other to come to the fullness of her images before judgment is rendered, whether hers or yours.

5. Nurture
   This is an advanced form of being empathic. Enter into the speaker’s story and help search for elements s/he may have missed. Remember: it’s her/his story, not (yet) yours.

6. Empty
   Let go of your present: your longings, knowledge and experience, hopes, dreams, problems, visions. When you have let go, you will find your way to the creative emptiness inside you.

Memory is the key.
The journey begins not with knowledge but with remembering.
Eternal distances and everyday concerns make us forget what we really know.

Sheikh Ismail Hakki
Parking

Deep Listening has become part of my standard toolbox. I’ve introduced it to groups in many different circumstances (and countries), and use it myself to hone my role as facilitator and coach. Along the way I came up with a useful metaphor: when we are deep listening, we need to safely ‘park’ all kinds of things in order to go on listening.

The word LISTEN contains the same letters as the word SILENT

Alfred Brendel

It comes as a surprise to many that our beliefs, thoughts and feelings can be safely parked until needed. We don’t have to allow them to drive us endlessly round and round the same circuit.

Feelings about Feelings

Why should we want to park? Well, let’s take a look at feelings. Emotions, like money and many other things in life, are magnificent servants and tyrannical masters. My feelings tell me that something is going on, and can help me understand and empathize with other people. They also can give me energy – or steal it.

Any situation can trigger feelings, positive or negative. They come in waves: first an emotional response to the actual situation, then a wave of fossil feelings (“This has happened to me before”), then often feelings about the feelings (“Darn, now I got upset again, why do I do that?”).

The second- and third-wave feelings are generally energy-stealers. They also can cause problems in a relationship because when I act them out, they can be difficult for the other person to understand. For example:

When I was a child, I was taught that girls are not supposed to be angry. At an important meeting a bunch of men tell me my project has been cancelled, just after I was asked to put in overtime to get it on track (which I did). I get really angry. What do I do? Burst into tears. The men are embarrassed but reinforced in their belief that women are hysterical. I get even more angry at myself for crying. And so on.

Fossil Feelings

An example: I’m in a hurry and someone cuts in ahead of me in a queue. When I was a child, my younger brother always got in ahead, and I was never allowed to complain because I was supposed to be more grown-up. The suppressed, fossil feelings from my childhood well up inside me and I scream abuse at the person who just cut in ahead of me – somehow, it was just the last straw.

Overreaction Doesn’t Do the Job

When we overreact because of fossil or secondary feelings, we don’t get the response from other people that we would like and hope for. Instead of being willing to talk about what is troubling us, they may withdraw or become aggressive. When we learn to park our feelings, we give ourselves a chance to sort out the different kinds.

There’s nothing wrong with anger, or sadness, or any other feeling; the art is, to understand which feeling is the emotional response to the actual situation, park the others, and express the current emotion in a suitable way. When possible, be silent! When in doubt, be silent...

Deep Diving Together

A group that routinely practices deep listening can achieve levels of empathy that otherwise appear out of reach; and can often reach agreement on even really conflicted questions. In short: I find deep listening to be a magnificent tool for both personal and group transformation.

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The text above is excerpted from a draft book Questions for Empowering Dialogue, private communication, Marilyn Mehlmann.

Community of Practice

Lana Jelenjev

A Community of Practice (CoP) is a group of people who share a passion for something that they do, and who interact regularly to improve their abilities through collaboration, group exercises, knowledge sharing and empathetic listening. They are meant to develop learning capabilities, build and exchange knowledge, and most specifically, lay the groundwork for identifying the community’s domain (area of expertise and interest).

Community of Practice was developed by Etienne Wenger and Jean Lave in the early 1990’s. Wenger argues that there are three crucial characteristics of a community of practice:

• Domain: a common interest that connects and binds the community together
• Community: a community is bound by shared activities around their common domain
• Practice: members of a community of practice are practitioners; what they do informs their participation in the community; and what they learn from the community affects what they do. They develop a shared repertoire of resources: experiences, stories, tools, ways of addressing recurring problems—in short, a shared practice.

What is important to note is that communities of practice are voluntary. Most communities of practice have no formal design and tend to be self-organizing bodies. They have a natural life cycle, and come to an end when they no longer serve the needs of the community. To make them successful, the community needs to generate enough relevance, excitement, and value to attract and engage members.

Wenger, McDermott and Snyder (2002) have identified seven key design principles for creating effective and self-sustaining communities of practice, related specifically to the management of the community.

CoPs need to be designed for evolution – the community must be able to evolve and shift in focus to meet the needs of the participants without steering too far from the domain of interest.

CoPs need to be open to both the inside and outside perspectives - an open dialogue is necessary to introduce and discuss new perspectives even if they come from outside the community of practice.

CoPs need to accept and encourage varying levels of participation - it is common to have different levels of participation in the community and acceptance of this can help in figuring out how best to engage the community members.

CoPs are strengthened when participants operate within public and private community spaces – encouraging individual or group activities that are shared publicly or privately (e.g. creating a blog to share activities or having small group meet-ups or video calls) can strengthen the community of practice.

CoPs focus on value - the thematic domain is the glue that binds the participants together, heightened by their shared practices.

CoPs combine familiarity and excitement - this is done through shared concerns and introducing challenging perspectives for discussion or action.

CoPs create a rhythm for the community - this is based on the regular activities and shared practices in the community which create the ‘cadence’ for the community.

Some praxis questions
What are we, in fact, doing?
Why do we choose to do it?
How do we feel about doing it?

Adapted from Warren Ziegler and the Brahma Kumaris
A growing number of people and organisations in various sectors are now focusing on communities of practice as a key to improving their performance and in providing transformative learning. It allows for groups of individuals to explore domains within shared rhythms, routines, and set practices. Aside from performance, communities of practice can also:

- Identify, create, store, share and use knowledge
- Accelerate their learning curve
- Permit faster problem solving
- Encourage, illuminate and embody good practices
- Be a fertile ground for new and innovative ideas
- Enable accelerated learning
- Connect learning to action
- Support both personal and professional transformation

The Importance of Community of Practice

Through my work with Dream See Do, I have guided various organisations in co-creating the structure for their Communities of Practice. What I have learned in facilitating formations of CoPs are:

It is important to allow participants to fully explore the domains. Often times helping them arrive at their “operational definitions” of the different domains helps in getting clarity and consensus in the domains chosen.

It is also crucial to identify the membership process in the CoP. How do you define who is in and who is out?

Although CoPs are self-organizing bodies, it is important to have a strong inner core of volunteers that help facilitate and engage members. Identifying these people can help move the objectives of the CoPs forward. Lastly,

Co-creating a set of practices (routines, rituals, rhythms on engaging with each other) as a community requires time and experimentation. Allow for reflection, evaluation and feedback in gauging the applicability and effectiveness of the practices that the community defined.

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Creativity and Transformation

Lawrence Kampf

In my work of facilitating embodied transformation over the last 35+ years, I’ve found creativity to be the single most accessible and effective path to transformation.

Creativity is the act of bringing something new and valuable into existence. Formally, this “something” is recognized as the idea while the resulting object or process is considered the creation, or product of creativity.

In energetic terms, Creativity is potential, Transformation is actual (what happens from engaging creativity). Both have (or are) powerful field effects, informing connected aspects in sometimes very surprising ways.

Five Qualities of Creativity

If we are to include creativity in programmes, we need to understand its qualities.
1. Disruptive - Involves a willing expansion into the unknown.
2. Embodied - Includes all aspects of Being, neural doorways are potent access points.
3. Open - A multitude of tools can be oriented to address creative development.
4. Efficient - Can include all available aspects of experience as resources.
5. Alive - A living catalyst, direct energetic experience.

Disruption is the enemy of order, but in the case of transformation, the stuckness of order is precisely what we seek to up-end. Creativity requires a dance with the known and a willingness to expand into the mystery of the unknown to seek new territory, meaning and form.

Richard Schut

Questions for the programme designer:
What is the “known” and what is the “unknown” in your case?

What transformation (as structural change) would you like to happen in/with the participant?

Richard Schut

Embodiment is a vast topic unto itself, but creativity includes and transcends all aspects of being and is inherently embodied. No aspect of ourselves is not included and all six of the core TL Competences are included.

Open: Creativity functions as an open framework, a meta-level approach that allows nearly any tool or system to be formatted in a way that engages it. This process in itself is creative!

Efficient: When the energies of all aspects of being are included, the systems become inherently efficient. In the basic ratio of Energy:Change, creativity fosters transformation more quickly and effectively than other approaches.

Alive: Creativity is a living, breathing energy that can be a powerful relationship, a stalwart ally and a playful muse. Creativity is life-force itself.
1. Self-knowledge is a natural result of engaging our entire being in a creative pursuit.

2. Working with people: Creativity fosters connection and even in a solitary pursuit, can effectively increase our ability to engage with others productively and harmoniously.

3. Envisioning is a foundational aspect of the dance with the unknown in the creative process.

4. Riding complexity happens when the multitude of layers of human experience reveal themselves.

5. Flow is the sweet spot of the creative process and an experience or state closely associated with creativity.

6. Pedagogy is easily and effectively informed and applied through creativity.

What’s the value of creativity? Intrinsically, when we engage creativity, we become happier, healthier, better able to relate to ourselves and others, expand our vision and are more capable of bringing it into the world. This has a net benefit to individuals and a collective benefit to society including a reduction of health care and criminal justice related costs.

It’s not just personal: the extrinsic benefits, those to the larger world and society are also legion. The World Economic Forum’s top 10 list of skills needed to thrive in the 4th industrial revolution moves Creativity from the #10 slot on the 2015 list to #3 on the 2020 list. In addition, the rest are essentially all aspects of creativity such as #1 Complex Problem Solving and #2 Critical Thinking.

Developing our creativity also directly fosters development of or easily translates to all eight of Howard Gardner’s Multiple Intelligences. Efficient and embodied, remember?

7. Visual – Spatial
8. Bodily – Kinaesthetic
9. Musical
10. Social - Interpersonal
11. Intrapersonal
12. Linguistic
13. Logical – Mathematical
14. Naturalistic

Engaging creativity is a powerful developmental catalyst.
The power of creativity has been my dance partner through much of my life, but teaching a pilot project of a new programme in 2019 really illustrated the significance of this.

I have been developing a foundational, online course for the Nova Earth Institute, an organisation dedicated to a better world through creativity. The initial programme was called The Embodied Creator and it was intended for anyone with an interest in personal development through the creative process. My desire was for it to be equally effective for early stage creators with relatively little awareness or experience as for late stage creators that may be long time professionals and highly developed.

The framework I created was informed by a decade of research in an earlier programme called The Embodiment Intensive and had strong biochemical, environmental and social influences. The project used as a vehicle is called the Map of Self and came from my wife’s experiences in architecture school.

Each week of the programme involved an introduction of a particular aspect of consciousness and instructions to create a map on a large piece of paper by exploring those energies and working in a particular medium. Instructions were fairly open, intended to help people find the end of their own personal thread and still offer plenty of room for exploration off the beaten path.

The results were extraordinary. From Erin, a 45 year old lifelong professional artist.

“I am so visually oriented, and the idea of using the creative process and art making to dig into what is actually going on with me was definitely appealing. I can be kind of stoic sometimes, especially about my own stuff, so I wasn’t sure I’d have a ‘moment’, but the emotional work and adding colour to the map in week 3 really struck a chord with me. I had to address some things personally (and am still working on that). I also realized that I avoid certain colours in my artwork in general, because they make me uncomfortable. Hmm.

“I think the greatest surprise was that I actually enjoyed the experience! I’m not a natural “participant”, and feel like I’m slow to warm up and get in a head space where I can actually learn and benefit, but I got there! Creating the map and having a thing to make with my hands was key for me.”

Creativity as Transformation is a field where we all share equally when we engage in it, no matter our role. You might say creativity is big medicine and to engage the muse is to light the fire of transformation, set sail from the shores of the known and go for the ride.

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The Hero’s Journey

A Supportive Pattern

Veronika Mercks

Life is a journey! This analogy can feel very fitting especially in life’s transition phases. The Hero’s Journey is a wonderful dramaturgy that can be used in the context of personal change and transformation, and at the same time, it is deeply rooted in different cultures across the globe.

The myth researcher Joseph Campell compared numerous stories and myths from all across the globe and found out that they all have a very similar pattern. This pattern is nowadays widely used in movies (well known examples are Star Wars, The Lord of the Rings, etc.) and also in coaching. A famous example of the Hero’s Journey in personal development is the gestalt seminar by Paul Robbiliot with the same name.

In personal development processes, the pattern of the Hero’s Journey can support people in transition phases to identify which stage they’re currently in to give them a feeling of sense in their situation. Often, when we’re on our own (inner) journey of transformation, we might not see that it is going anywhere and we might be overwhelmed with what is going on. The Hero’s Journey can create hope for change and development.

Furthermore, the Hero’s Journey can be used in different settings, e.g. for personal development, where it can create a deep dramaturgy for transformative learning processes. Through this, the participants become part of their own story; knowing about the different stages supports them to get a sense of orientation in their own process. At the same time the dramaturgy gives a frame for the group process: Even when all the participants enter a training with different callings, the Hero’s Journey creates a framework where individual processes get space.

Last but not least, the Hero’s Journey dramaturgy acknowledges that the transformation of the individual also impacts their communities in the “known world” after the return from the journey. Consequently, by using the Hero’s Journey as a methodology the aspect of transformation on a societal level through personal transformation can be addressed.
Stages of the Journey

In the following, a simplified version of the stages is presented in connection with personal development:

1. Calling: The hero hears a calling for a new adventure. (Changing the life situation, finishing education, travelling, changing career, etc.)
2. Resistances: He/She feels resistance to really follow the calling. (Fear, doubts, low self-esteem, excuses, common beliefs, parents, etc.)
3. Mentor: A mentor supports the hero to step into the unknown world (A good friend, parents, a stranger, an enriching experience, etc.)
4. Threshold: The hero crosses the threshold into the unknown. (Quitting a job, splitting up with a partner, travelling to an unknown place, etc.)
5. Discovery: The unknown world wants to be discovered. (Trying out new things, gaining experience, getting to know new people, getting out of the comfort zone, etc.)
6. Challenges: Smaller and also some big challenges need to be overcome. (Finally saying the truth, experiencing losses and pushbacks, facing one’s own deepest fears, etc.)
7. Treasure: The hero finds a valuable treasure. (A transformative insight, self-esteem, new friends, self-realization, etc.)
8. Returning: The hero might feel resistance to returning.
9. Homecoming: The hero crosses the threshold and returns home into the known world as a changed person. (Coming back from a journey)
10. Reintegration: The hero has undergone (transformative) changes during the journey and now needs to integrate the learnings into life and sharing them with others.
11. New Calling
After I came back from a longer journey I participated in a “Hero’s Journey” Gestalt seminar. I must say that this was for me the most impactful personal development seminar I’ve ever experienced. It was a time when I perceived a new calling: The creation of my own organisation in the field of personal development and transformative travelling. Besides the very interesting “Gestalt” approach, the dramaturgy of the Hero’s Journey deeply made sense to me especially in this phase of my life. It also helped me to understand much better my phases of change in the past and also regarding my longer travel experience. I was the hero of my own story. Together with the methods used which were playful, deep, intensive, and which involve body, mind and heart (even though the mind was invited to step back for a while) I was able to experience myself on a deeper level. After this experience I decided to use the “Hero’s Journey” together with holistic and experiential learning approaches for my own work with my newly created educational initiative “Navigaia Journeys”. Together with different facilitators we created trainings for teenagers who are about to finish school, to encourage them to embrace the unknown, to travel abroad, and to find their own life path. Moreover, we’ve created a similar Youth Exchange for young people across Europe with a similar goal. We’ve experienced the impact the dramaturgy has and how well it fits with the topic of travelling and the transition phase from young people into adulthood.

If you’re keen to include the “Hero’s Journey” into your own work, I can highly recommend combining the dramaturgy of the Hero’s Journey with other experiential and holistic methods.

The Drawing for Life programme combines teaching about sustainable development with teaching how to draw comics in collaborative teams; and builds on a Hero’s Journey role-play as the skeleton for the comics. The original idea was to enable young people from different cultures to communicate about sustainable development without the need for a common language. As far as possible the comics are without text. This idea has been only partially realized but, beyond that, the programme proved to be a powerful tool for transformative education, for both students and teachers.

The pedagogy behind the programme is documented in chapter 10 of the book EarthEd: Rethinking Education on a Changing Planet. The teachers’ manual for all three topics (sustainable development, Hero’s Journey, drawing) is available for free downloading in English, Albanian, Belarusian, Macedonian and Ukrainian.

From a student comic about the hazards of unsorted waste Worldwatch Institute: EarthEd: Rethinking Education on a Changing Planet, 2017


References

Website of the Joseph Campbell Foundation: https://www.jcf.org/


Working with People

The tools mentioned here may be used directly in the workplace, in a classroom or with civil society groups; or alternatively for bringing together people from different arenas.

Bringing People Together

Open Space Technology (OST) and World Café are useful for arriving at concrete results with large groups. Either can incorporate elements of Art of Hosting, which has a strong emphasis on interaction and leadership skills. Process Work and Shared Values deepen the collaborative qualities of groups.

Handling Conflict

Conflict is not bad - in fact, it may often be a sign that people care, and thus a potential source of energy. However it can lead to deadlock, disrespect or authoritarian behaviour if the energy is misdirected. Depending on the source of the conflict, different methods may be appropriate.

- Conflict of values and opinions
- Conflict of perspective on ‘facts’
- Emotional enmeshment

“There is a very thin line between a facilitator and a space invader.”

OPEN SPACE FACILITATOR
World Cafe

The World Café is a structured conversational process where members of a larger group form small groups of preferably 4-6 people, and sit around tables to discuss relevant topics. They make notes of their discussion, then after a previously set time they switch tables. Each table has a “host” who stays at the same table and informs the new group about the previous discussion(s). After several of these rounds, ideally 3-6, the table hosts summarize their table’s discussions in a plenary session.

This method was ‘accidentally’ developed by Juanita Brown and David Isaacs in 1995. They were leading a business meeting when rain disrupted a planned plenary discussion and the participants spontaneously gathered in small groups to discuss the proposed topics among themselves. They periodically changed tables to get insight of conversations at the other tables, and by the end of that morning the group collectively deepened their understanding of the issue. Since then, research has been conducted in several countries to highlight the principles that enable groups all around the world to create collective knowledge in basically any given topic.

Design Principles

The seven design principles are:

1. Set the Context
   Make sure you know what you want to achieve by the end of the session. While the results of the discussion of course cannot be set previously, one should know the reason for bringing people together. This enables you to find the right participants for your group and to set up the right questions to discuss.

2. Create a Hospitable Environment
   Creating the right atmosphere is vital to have vivid discussions. Both the social environment and the physical space should be comfortable and welcoming, so participants can feel safe to interact with each other and share their ideas - and be creative.

3. Explore Relevant Questions
   You can help to initiate relevant discussions if the questions you set up are relevant to the group. Define the topics for the tables according to your group’s interest and real-life concerns, so knowledge can emerge in an organic way.

4. Encourage Contribution
   Any conversation can be enriched if there are several different perspectives “on the table”. Therefore encourage everyone to participate and actively contribute to the conversation, while avoiding forcing anyone to speak if they prefer to only listen (this connects with creating a comfortable environment - no one should feel they are forced to do something).

5. Connect Diverse Participants
   The World Café format allows people to change topics and groups, thus meeting new people and new ideas in each round while bringing their own experience to the new groups. When diverse participants have the opportunity to meet with one another they can discover new perspectives.

6. Listen for Patterns
   Listening to each other is a key element in a dialogue. Encourage participants to not only share, but also to listen. This way we can find patterns and insights that were unknown before. Encourage people to actively look for the patterns emerging at the separate tables, with possibly different participants, coming from different environments having similar experiences.

7. Share Collective Discoveries
   Finish the session by “harvesting” the knowledge of the whole group. Ask each table host to summarize what was discussed at their table and so make the patterns visible for everyone in the room. Consider that everyone was discussing the same topics but they each have only a snippet of the whole.
A Co-creative Approach

While the structure of the World Café is pre-defined, the outcomes cannot be predicted, as they are heavily dependent on group members’ active contributions by way of ideas, experience, and questions. Therefore there is a true chance of getting new perspectives and letting patterns emerge that were previously not imagined by any of the group members, but that were born or discovered through the participatory process. If they are open to listen to others of diverse backgrounds, people’s conceptions can be shifted, and the quality of the collaboration can be substantially different than through traditional discussions.

World Cafés also encourage collective action, as everyone feels involved in the process, which enhances their motivation to actually create a difference in the world, as opposed to leaving the discussions in the conference room.

The World Café format is a rather simple way of mobilizing a large number of people at the same time and involving every group member in a dialogue.

The Art of Hosting

The Art of Hosting and Harvesting Conversations that Matter (full title!) is usually billed as an approach to leadership that scales up from the personal to the systemic, “using personal practice, dialogue, facilitation and the co-creation of innovation to address the complex challenges that we face in the world today”. It is thus a tool squarely addressing Competence 4, Riding complexity, but also useful in relation to competences 2, 3 and 5.

The Art of Hosting (AoH) is also described as both a suite of conversational methods, and a network of practitioners.
- The methods overlap with or can be used in combination with numerous others documented in this book; for instance, World Café, Appreciative Inquiry, Open Space Technology.
- The network is global and has no formal, legal structure, no appointed leader, no accreditation programme and no controlling body. It is based on local Communities of Practice (see separate chapter); it is committed to learning and generous with its sharing and support.

AoH is therefore taught in a transformative way. When a practitioner sees an opportunity to organize a training, s/he is supported by an international group of stewards who hold the deeper practice pattern and assure the quality of the trainings and the integrity of the global network. Other experienced practitioners and apprentices join the team. Participants embark on a learning-by-doing journey since they will not only be invited to engage actively in conversation, but also to step in to design and host parts of the training with the team.

https://www.artofhosting.org/home/
What I like the most about World Café is the flexibility: no matter how large the group, we can always set up as many tables as necessary and be sure to create an opportunity for everyone to get involved. There is no limit regarding the topics either - from business to social issues, from sustainability questions to health care, anything can be discussed.

If designed and facilitated with care, it can also help to shift a discussion towards proactivity. For instance, in 2018 I facilitated a World Café with a group of teachers and educators about play-friendly schools. We developed a programme through an EU funded Erasmus+ project called Children’s Access to Play in Schools, where our aim was to get as many schools as possible on board to become play-friendly, meaning that they recognize the value of creating opportunities for children to play freely in schools. Our experience was that often teachers and school staff were on board in theory. They saw and understood that it is a good thing - but when they thought of it in practice, it was very difficult for them to envision a working model in their own setting.

We invited around 40 educators to participate in a World Café where they were asked to brainstorm ideas about implementing free play in schools. As some participants were proactive from the beginning, it helped others to shift from the mindset of “This is nice but it would never work in my school” to “Okay, let’s think about solutions!”. We spent about an hour visiting topics such as “Where can you find time in your school’s timetable to create opportunities for free play?”, “What aspects of the physical space should be modified and in which way?” or “Which aspects of the school culture are already supportive of play, and which should be transformed?” Thereafter we harvested a large number of ideas about possibilities of implementation. It turns out that there are plenty of opportunities!

In my opinion there were several elements of this session that made it successful.

• First, we needed to acknowledge people’s frustration about the system in which they are working and make sure to let them know that they are doing valuable work already, and this programme is not some extra requirements but an opportunity to make their own and their pupils’ lives better. It’s all about creating a comfortable atmosphere - we are not judging anyone regarding their practice.

• Secondly it was useful to have some ideas beforehand, to help start the discussion in a proactive manner. The table hosts also had an important role in facilitating the discussion and balancing “airing out emotions” and finding possible solutions.

• Finally everyone had a chance to visit all topics and so feel involved in the process, so that they could leave with the feeling of doing something useful, which motivated them to return to their schools and introduce these ideas to their colleagues.

References
Juanita Brown, David Isaacs and the World Café Community of Practice: The World Café - Shaping Our Futures Through Conversations that Matter
Open Space Technology

Thomas Herrmann

In 1998 I met two colleagues by chance in a corridor. They had attended a conference and what they shared touched me, so I decided to check it out. It sounded quite impossible, a conference with no set agenda. But they said it works!

I had been working in different positions in the Swedish Labour Office since 1991 and at that time my main task was to scout to see what the future might bring for our organisation. I also experimented with how to use the capacity in our organisation better. So, I had the space to follow my intuition and my heart.

In the following 20 years I have “opened space” hundreds of times and trained several hundred persons around the world, mainly in northern Europe. So back in 1998, I for sure got hooked on Open Space Technology!

To understand Open Space Technology you would preferably need to experience it. Another good way is to watch a video. There is an instructive video from a conference I facilitated for the Swedish Transport Administration in 2011. I invite you to have a look: https://www.youtube.com/watch?v=I_WmctEWkRI&t=

Yet another way is to listen to a story, and I am happy to share one.

On 11-12 September 2008, more than 300 people from different organisations, both NGOs and public employees, accepted an invitation to come together to work on finding ways to improve how they work against drug addiction or support addicts in the southern region of Sweden. The starting point was a newly issued set of guidelines from the National Board of Health and Welfare (Socialstyrelsen).

Thursday morning at 9.30 there was silence in the large circle (four concentric circles and a large open space in the centre). As usual a bit of confusion, where am I, what is going to happen here, why are we sitting in a circle…? Many questions in people’s minds.

One of the sponsors welcomes everyone, repeats the purpose of this two-day gathering and highlights the theme for the conference which is visible on a large poster on the wall: From good to best! How shall we develop our work against drug addiction in Skåne? (southern county of Sweden).

I am invited into the circle to explain how we are going to work. I hear Harrison Owen’s words – when you are entering that circle you are holding those people’s lives in your hands! A bit dramatic maybe but at that moment people are totally dependent on me to make some sense of where we are heading… and I do have a plan!

I start walking in the centre of the circle, sharing how we are going to get some productive work done here around the issue that has attracted all these people to come. I invite each person to look around the circle and acknowledge the immense potential we have gathered here today, thousands of years of experiences(!) and collected knowledge that we are able to use constructively during these days.

During my introduction, it becomes clear that the agenda for
these two days is an empty wall, no pre-set topics, just the overall theme as our common focus. I also make people aware that in the centre of the circle there are paper and markers and that when I have finished my introduction I will invite anyone who cares to, to come into the centre and raise any topic that they would like to discuss with others present. Write your topic on a paper, read it out in the microphone and put it onto the agenda wall.

Is this guy kidding? Can this really work?

To help people to at least have a little hope that it may work I share that this method has been used since the mid 80s all around the world and that on all occasions that I have facilitated there have been topics on the agenda. But I also say that I do not have a plan B – and that is true!

The agenda wall fills up, people are working passionately. They self-organize during the day's only meeting in the large circles in the evening and morning. A total of 46 reports are written, a prioritization is made and 7 action plans are designed, each with a cross-sectoral action team.

To ensure sustainable results, preparations were made with the different stakeholders before the conference. A structure for follow-up activities was also in place, which ensured support for the implementation.

One powerful memory I wish to share from this conference. Two of the participants from an addicts’ group were considered troublemakers and my client was afraid of how they would act during the conference but didn't dare to exclude them either. I shared my experience, that the freedom given by the “law of mobility” usually helps things to move smoothly – and it did. These people were highly engaged and passionate about contributing their experience, and this was the first time they had actually been invited to contribute on their own terms (and as equals). One of the top actions that became a county-wide project came from one of them.

Years later I facilitated a training for 10 people from the addicts’ group in Skåne. They learned to work with Open Space Technology and then facilitated development activities inviting officials to find solutions to challenges around drug addiction!

Trouble-makers?

Harrison Owen who developed the method says that anyone with a good head and a good heart can read the book (Open Space Technology – A User’s Guide) and do it. The method is in that sense very simple, put a circle of chairs, put paper and markers in the centre. State the theme, invite participants to post issues and go to work! On the other hand, it takes a lifetime to master how to create conditions for sustainable results...

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Open Space Consulting AB www.openspaceconsulting.com/open-space-consulting-english
Shared Value-Scaling

Marilyn Mehlmann

Collaborative environments are ineffective when participants believe that their value systems differ. In many cases the perception is false, due to lack of clarity about what the values are and what they mean in practical terms.

The Shared Value-Scaling method, derived from psychosynthesis, can be helpful to establish foundational values and gain consensus for effective collaboration.

The method is based on the observation that any virtue taken to its extreme can become a ‘vice’. When does neighbourly concern become intolerable interference? When does respect for rules and regulations prevent achieving any results? When do flexibility and creativity lead to lack of coordinated action? When does truth-telling become trolling? When does loyalty become dishonesty?

The Shared Value-Scaling method leads to agreement around a set of basic values, with an interpretation that is generally accepted. It has three steps:

Step 1.
Establish a list of around six prized values

Brainstorm which values we prize, prioritize them

Step 2.
Map the chosen values.

We pose 4 questions for each chosen value:
1. What is the value you embrace? (e.g., loyalty)
2. What is its opposite? (e.g., unreflecting trend-follower)
3. If the value were taken to an extreme, what would its negative pole be? (e.g., blind support even to evil purpose)
4. If the ‘opposite’ were to become a virtue, what would it be? (e.g., openness to new input, ability to reach new conscious position)

The sequence is entered into a table, one line to scale each of the chosen values.

Step 3.
Discuss and agree

What do we mean by each of these? What indicators are there that a line has been crossed? Do we still think these are our highest priorities, or do we need to examine some other values? - in the latter case, repeat the steps. In some cases it may be worth codifying the results into a kind of manifesto: this is how we want and aspire to relate to each other.
Transformative Edge

Working through questions like these enables unreflecting cycles to be broken: the unreflecting cycle is for example the knee-jerk that loyalty is always good, no matter to what or to whom. Through this exercise, a new and broader perspective is achieved for all participants, opening minds and hearts to new possibilities. Disagreement is no longer seen as unethical and thus a source of conflict or bullying - “you are a jerk if you don’t agree with me” - but a starting point for collaborative exploration.

This is indeed a journey of discovery. We may discover that we are in agreement despite initial appearances; and we may discover that even if our values do in fact differ, that very difference can bring appreciation of diversity and spark new levels of collaboration. For many, this journey is in itself a transformation - personal, as well as a detox for the working environment.

Personal Experience

Working as a consultant I found this method particularly useful when a group had locked itself into a position where it was almost impossible to make any decision, except by decree from the highest-ranking person. What amazed me was how quickly it could release such a log-jam. In one very senior group that had been struggling for months, it took only two hours to sweep into a new place of action and mutual learning.

One of my teachers in conflict handling once said, “As soon as there are two people in a room, there is the seed of conflict”. My experience with psychosynthesis taught me that you don’t even need two people; one is enough. Working with values in this way has taught me that many, many conflicts are based on quite simple differences of perception, including how words are interpreted; a Shared Value-Scaling exercise is a simple way to move beyond, to shift perceptions, to see the value in diversity.

Another Method:

WeValue: an EU project concerning shared values in schools

“We believe that the way in which we see, understand and value ourselves and the world around us is essential to creating a sustainable, just and responsible society.”

Marie Harder

Working on shared values can be extended far beyond the simple Shared Value-Scaling method. In particular, in the context of social change the results can be used to develop indicators to monitor and evaluate outcomes. The international WeValue project led by Professor Marie Harder at Brighton University has developed a widely used set of methods for this purpose. They write, for instance:

“We have piloted a way of using values-based indicators to help undergraduate students to reflect on, and assess, how they work together in and as groups. While universities normally focus on the development of competencies at an individual level, learning how to collaborate and co-create with other people is an essential dimension of education…”

http://blogs.brighton.ac.uk/wevalue/
Non-Violent Communication

Cara Crisler

Non-Violent Communication (NVC) is a simple, extremely powerful and effective tool for improving our communication skills in all our relationships - at work, with friends, family etc. It helps us to see clearly what blocks our communication from being effective, and teaches us what we can do differently to create communication that brings understanding, trust, connection and cooperation. NVC helps us to resolve conflicts, heal wounds (between us and within ourselves), make the contribution and be the leaders we want to be in any given situation. Worldwide, it is taught and used in sessions with individuals and couples, schools, businesses, prisons, health care institutions and more.

Transformative Edge

The expression “non-violence” comes from Sanskrit, “ahimsa,” which means the opposite of harm, or absence of violence. In NVC this is the key intention while giving guidance about how to shift from language/expression that is about the other (which often brings distance) and instead to allow for connection by taking ownership and experiencing empowerment by making observations, connecting to one’s own feelings and needs, and including requests that help meet those needs. NVC helps to move us out of old subconscious patterns by increasing our awareness of the choices we have in communication: self-connection, (empathic) listening and (authentic) expression ending in request either to oneself or to other(s).
An NVC “healing dialogue”:

As a relationship/communication coach, I sometimes receive requests for support by people in my life whom I consider a friend. I am very careful about these situations... IF I choose to lend support, then I do so in my role as friend and empathic listener as opposed to a paid professional coach. I once made an exception and agreed to accept payment from a friend. There was an outside funding source and she very much wanted to value my time and expertise by paying me for regular live sessions. Many months later, we talked about how she wanted to find additional sources of support, ones that could better meet her need to preserve energy (less talking, more body focus). At the same time, my own time was getting limited as other work opportunities appeared. We ended the regular sessions, I thought with clarity and full agreement. About four months later I realized there was more to it. My friend was in pain, feeling hurt about what happened between us. I received some blaming messages which left me feeling confused and upset.

Thanks to our combined NVC skills, we were able to take the following steps and reach effective and complete resolution:

1. Empathy for me / self-connection / self-compassion: My friend wanted to be heard and seen by me, yet I knew that I first needed empathy myself. I received this via a friend in addition to journaling about my thoughts and feelings, a first step for me to find compassion for my actions and underlying needs.

2. Empathy for her: With my recently gained sense of grounding and self-compassion, I was then able to listen to her fully. Together we discovered two “parts” within her, and how she was living with an inner conflict. Conflict is always at the strategy level, in this case:

   “I get what I want” (interpreted as “my ideal mother figure”) OR “she gets to choose other work” (interpreted as “she cares more about her other work than about me”).

3. Space for mourning: As these two parts became clearer, many tears fell and much space and silence was given for her sadness. She at one point took full responsibility and said, “I mourn that it is so unhandy how I get attached to certain people who are like the ideal mother I wish I’d had as a child. This attachment strategy doesn’t enable all of my needs to be fulfilled.”

4. Shifting from “or” to “and”: Her full set of needs in this situation include: wanting to be seen, all her needs mattering with acceptance/love/appreciation AND ease/flow/choice/freedom (for herself and for those she loves).

5. Authentic expression: I expressed my appreciation for her ability to move out of blame mode and completely own what’s alive for her. I was able to be in full compassion for her, feeling my love only and no longer with the sense of “I have to defend myself” or “I can’t deal with her” or even worse, “I give up on this relationship.”

6. Creative new agreement that meets all needs: We agreed to return to a friendship, without payment or mixing up of roles. We agreed to meet live or online about 8-10 times a year for balanced exchanges (each of us sharing and listening). Both relieved, both happy, knowing this kind of connecting resolution wouldn’t have been possible before we learned NVC skills.

[Noteworthy: This kind of connecting dialogue is also possible when only one person has learned NVC skills! It would then likely require additional breaks for self-connection/empathy and a longer time spent listening with empathy to the person who does not know NVC.]

Reference
The founder of NVC, Marshall Rosenberg, wrote the basic book, Nonviolent Communication: a language of life along with other theme-based publications. Worldwide there are certified as well as non-certified trainers who have written books and blogs and give workshops and courses, both live and online. The Centre for NVC provides information about trainers and learning resources: www.cnvc.org.
Envisioning

The ability to imagine desired futures, whether individual or collective, is a strong step towards transformative learning. Most processes for organizing action include ‘futures’ elements at some stage of their process.

Futures work can take many forms, for instance:
- Forecasting, with focus on expectations
- Risk analysis, with focus on fears
- Visioning, with focus on hopes

Here, we look only at methods for visioning, as a path to transformation. Such methods also contain the seeds of action; for instance Causal Layered Analysis, Enspirited Envisioning, Three Horizons, and to some extent Appreciative Inquiry.

Successful methods in this area seem to share a set of generic steps, as identified by Marilyn Mehlmann:
1. Unleash creativity
2. Set the context; for example, Planetary Boundaries, or ‘my neighbourhood’, often including exploration of the edges of the context: identify unlikely but possible futures
3. Map the high spots: describe desired futures
4. Backcasting, or ‘future present’: leap to a desired future and describe ‘how we got here from there’

Several methods of relevance in other competence areas also contain elements of visioning; not least, methods for improving Self Knowledge generally include a futures component.
The Future Game 2050

The Future Game 2050 was designed to give everyone a secure space to create and think of future scenarios and stories. By using pre-written sci-fi stories modelled as a role card or, to be precise, a user persona, the learner is able to enrich future scenarios by herself. The Future Game 2050 has two fundamental core elements: prototyping and personal development. These can be used to
1. Create prototypes of future products and/or services
2. Stress-test existing products for future viability
3. Improve futures skills of the 4Cs: creativity, collaboration, critical thinking, and communication.

We believe that everyone can learn to activate these futures skills. Especially human resources departments could profit immensely by improving their future workforce.

Context

The Future Game 2050 is a workshop tool and role-playing game which explores the future through various roles humans could carry out in a future society and working environment. The roles are inspired by trends and developments we already see today, enriched by sci-fi and creative elements. The Future Game 2050 triggers conversations about the future and helps to create your own future scenarios and stories.

The current workshop tool version is tailored for corporates and NGOs to learn how to build strong future scenarios. Only when pictures and stories are made explicit and tangible can we start to make them a future reality. We believe that we need more emotional and creative stories to create positive and desirable futures.

The Future Game 2050 uses sci-fi storytelling to explicitly open up a fictional world everyone can enter and expand. This layer of fiction and play is important to engage learners in future thinking which often causes anxiety at first. The "sandbox reality" created by playing a game eases learners into using their imagination and reflecting on their desires, fears and values while creating their own future stories. The point of departure as well as the journey to expand is pre-given. The learner must then decide what happens on the journey towards a sci-fi story. To guide this journey, we developed a questionnaire. This questionnaire uses the method of character development and world building. Regarding the questionnaire, it can be applied to have a learning experience of one hour up to two days. Considering the time frame, The Future Game 2050 is a very modular tool which can either enhance an existing workshop or it can fuel an entirely unique workshop design.
"Future Literacy"

The top skill of the future is Future Literacy. Future Literacy is defined as “a way of generating the imaginary futures needed to understand and act in the present” (Miller 2017), and to be able to find orientation and self-efficacy in a world of constant change, new technologies, and societal transformation through reflecting up on your own values and biases when anticipating the future. It wants to equip everyone with the skill to "use the future" and to understand the transformative power of their imagination. Future Literacy is also a main topic of UNESCO. The sci-fi stories of The Future Game 2050 contain several dimensions and skills to make people aware of and train Future Literacy.

To practice and foster Future Literacy and the 4Cs (which are both inevitably interwoven) we use storytelling because stories do create realities. “The past, present, and future are not only constructed but connected in a linear sequence that is defined by systematic if not causal relations. How we depict any one segment is related to our conception of the whole, which I choose to think of as a story.” (Bruner 1986, p. 141)

A story is not just a linear addition of events. It is furthermore a self-assurance of events and happenings which are important to us. Everyone is doing this creative re-arrangement every day. We create the world and our relationship towards it through selective storytelling. Whatever we chose to put in such a story, it defines our reality, identity, our ethics, and our goals in the future. (White 1988, p. 23.)

“Fueling stories with emotions will help to remember even stronger, because emotion always do highlight our reality. What’s more, storytelling functions as a way of anticipation which is the basis of imagining any future events. In a next step, the created stories can then be used to identify and reflect the weaved in assumptions and biases of the players. This leads to a new level of Future Literacy and paves the way for reframing the stories to create new future narratives beneath the beaten path of mere projections of the past.

For that reason, Future Literacy and the 4Cs in stories is the perfect space to raise awareness of them. The Future Game 2050 offers a point of departure to apply these skills in real life afterwards.

We Tested it - and it Worked!

After the official launch, we tested the workshop tool again with representatives from global business (Porsche Holding, Lufthansa, Deloitte, Foster & Partners). In less than 40 minutes, we generated vivid and rich stories which could have been a plot for a Netflix series. Here is an example: "In contrast to the assumption of the existence of the Bee Counter, the Immersive Creator had only created a visual idea of the Bee Counter to let people think everything is fine with nature and bees." Such a story can be used to reflect and ref-frame the future to create a truly desirable future narrative.

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www.thefuturegame2050.com


Business as usual is losing its fit for purpose

Three Horizons

Compiled by Marilyn Mehlmann with input from Daniel Christian Wahl and Diego Galafassi

This method, or approach, has been developed over many years of experience by different practitioners, and is gaining ground as a way to conduct fruitful dialogue in a context where current systems and solutions are failing and marginal change no longer serves.

From this point of view,

**Horizon 1** is ‘business as usual’: where we are and where we are headed

**Horizon 3** is a vision of one or more preferred futures

**Horizon 2** is a path of transformative innovation from 1 to 3

Daniel Christian Wahl writes:

The framework has been applied in a variety of contexts, including the future of intelligent infrastructures in the UK, technologi-
cal foresight in the IT industry, transformative innovation in the Scottish education system, the future of Alzheimer’s research, rural community development, and executive leadership pro-
grammes. It is a versatile methodology for inviting people to explore the future potential of the present moment through a number of perspectives that all have to be considered if we are to steer our course wisely into an unpredictable future.

I believe the Three Horizons offer an important framework for thinking about transformative innovation that can be used to facilitate the transition towards regenerative cultures. It can help us to structure our collective exploration as we start living the questions together as conscious participants in this transition.

Bill Sharpe has been a key developer of the method and has published a beautifully illustrated little book, Transformative Innovation. He writes:

“The three horizons are about much, much more than simply stretching our thinking to embrace the short, medium and long term. They offer a co-ordinated way of managing innovation, a way of creating transformational change that has a chance of succeeding, a way of dealing with uncertainty and a way of seeing the future in the present.”

He also points out that there are horizons within horizons: when working with the third horizon we may find ourselves working with three categories of things:

Within the third horizon we need to distinguish those things that can be known from those that are inherently uncertain or ambiguous; and what we can influence from what we can’t.

Map what to let go of, what to conserve, & transformative innovation to reach a shared vision
Paradoxically, the further out we look the more certain some things become. Like snow that falls in the mountains in winter and will surely flow to the valleys in summer, there are emerging realities that lie beyond our control that are part of the landscape of the future to which we will have to adapt. In futures work these are given the name “predetermined factors”. Finding them is an important step in framing our transformative action so that we work with the grain of change.

Some aspect of the future we anticipate but without knowing how they will turn out, depending as they do on the actions of others or factors that no one controls. To the extent that they will shape our own path these are “critical uncertainties” that we must navigate as the future unfolds.

Finally, there are the areas that we can shape from our vision and intent.

- Emerging realities, beyond our control
- Critical uncertainties
- Areas we can shape from vision and intent

Identifying and clarifying these areas is an important part of the work.

When in 2018 I was invited to co-facilitate a Three Horizons workshop in East Africa, I had little idea what to expect. The occasion was an international conference focused on food, agriculture, and sustainability: could we identify pathways towards food resilience, on a continent still plagued by hunger and suffering drastic effects from climate change?

Three Horizons was a good choice of method, as it helps open up more radical pathways as legitimate alternatives to business-as-usual, in order to achieve transformative change. And it was indeed an inspiring experience. No less than three pathways for East Africa emerged. Core concerns included among others the impacts of climate change, land degradation, food insecurity, inadequate governance, inadequate infrastructure, low level of financing and issues related to technology (including the dichotomy between modern and indigenous knowledge), and youth migration/brain-drain.

Even acknowledging such challenges, all three pathways represent a vision of a peaceful and prosperous Africa in the future, capable of feeding itself and the world.

For us working on the facilitation team this experience demonstrated the clear benefit of the Three Horizons bottom-up approach to such complex questions as the United Nations Sustainable Development Goals, and Agenda 2030. It remains to be seen how these insights will be taken up by the appropriate decision-makers.

References
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- Sharpe, Bill, Three Horizons: the Pattern of Hope

An Example from Diego Galafassi
Backcasting

Manuela Hernández

Backcasting, as the word suggests, is a reverse-forecasting method. The point of departure is envisioning an ideal situation in the future, as a way to discern what is needed to get there. By doing so, risks and knowledge gaps are identified and planning is made easier. A typical backcasting process involves the following steps:

1. Framing: Define the overall scenario and its time frame.
2. Visioning: Imagine your ideal end result, and envision that scenario, including your personal goals.
3. Backcasting: Move into that imagined future. Think back on how you got there: what actions and learnings took place along the way?

After completing these three phases, it is important to gather insights into challenges that can arise, steps that need to be taken, strategies and resources needed to achieve the goal.

Backcasting is widely used in business, and is integrated into numerous other methods, for instance Enspirited Envisioning and Three Horizons.

As a practitioner, I think backcasting gives us an opening to identify knowledge and planning gaps at the same time as it puts the participant in the centre, and in charge of his/her own planning and actions. The transformative edge is that it encourages out of the box thinking, at the same time as it helps us gain a sense of the potential of the future and its uncertainty.

My own experience is primarily with university students planning to study or intern in a foreign country. However I have used the same framework outside the academic sphere, namely international employees going on an expatriate assignment abroad.

University Students

I have used backcasting in my mentoring and trainer practice as a way to help students delineate a future scenario, with conscious goals in mind. In backcasting, enabling goal-setting as well as designing a personalised learning journey, the learner has a sense of ownership and clarity.

In the example that follows, I used backcasting as a way to set the tone, and define individual objectives for a pre-departure training for college students going abroad for their internship or mandatory exchange. The goal was to support students in envisioning their personal, academic and professional goals and challenges; and in developing a sense of ownership for their new international learning experience.
When framing the context of the training, and of their experience abroad, it was important that students understood why intercultural competences were central to their learning abroad. In the university/faculty where this took place, internationalisation is one of the key elements of the curriculum, and in that sense, it is expected from them to acquire intercultural competences at different levels. By means of dialogue, students were invited to explore what it means for them to be interculturally competent- What intercultural competences do they already have at the moment of the training? And what competences are they expecting to develop while carrying out their international assignment?

In this learning scenario, the starting point for envisioning was to imagine that they had already completed their experience abroad, and are ready to return. Questions were asked such as: what have you learned? What have you discovered? What experiences do you bring back with you? What important stories are you longing to share with your loved ones? Students were asked to sketch their answers in a personal mind-map.

After students worked through these steps, they were invited to discuss their personal mind-maps in small groups. In these small groups, students could share their challenges, and brainstorm together about the possible strategies or actions that could help overcome these challenges, as well as establish priorities.

I personally am very fond of using backcasting in this type of learning scenario, because it allows learners to dream and imagine what their story of success might look like in the near future. That dream element sparks their intrinsic motivation, and gives them the chance to deal with their pre-departure stress in a more positive way. I also think that backcasting works best when using collaborative methods, and is visualised in a graphic way. I have always been amazed at how students respond when we begin with the end in mind: the realisation that transformation will undoubtedly happen as they discover a new culture and expand their learning. The pre-departure anticipation, as well as new insights that backcasting can bring about, allow students to develop a sense of confidence, and more importantly, a compass point to keep in mind.

Example:
Developing Intercultural Competence

References
Many people experience “drawing” as an art form or creative technique that only seems to be reserved for certain, especially “talented” people. The practice - as soon as one dares to experiment with easily learnable tools and techniques - shows, however, that every human being is capable of expressing him or herself through even the simplest graphic elements and thereby collaborating with others in processes associated with deeper learning.

Visualisation has manifold potentials and application methods. Here are some possibilities:

- Planning, implementation, documentation and reflection on:
  - (parts of) Courses
  - Research projects or
  - Educational events such as conferences.

- Planning, implementation, documentation, reflection on research processes
- Structuring, (re)linking and supplementing knowledge content found / created e.g. in learning processes
- Visualization of existing knowledge, knowledge gaps, prejudices, clichés...

- Approaching conscious perception as well as understanding and deconstructing complex knowledge contents, e.g. of contexts or processes in fields such as technology, biology/medicine, design, communication; further development as well as change management of/for companies and institutions

- Planning and visualization (i.e. simultaneous documentation) of individual and group work
- Collecting, structuring and linking opinions, hopes and fears of different target groups in a participative and empowering way.

It is important to emphasize that all techniques can be implemented analogously with paper and pens as well as with the help of various digital devices and corresponding programmes. In recent years in particular, there have been many new developments, including inexpensive and free tools. Access has become much easier: for example, different apps can be used with standard smartphones, which often promote visual thinking and working. Hybrid approaches use steps like:

- Digitizing paper-based results and then collaboratively supplementing them
- Complementary digital and offline printing
- Re-digitizing
Even people who think they are not creative can express themselves with the simplest visual means and thus participate in thinking, learning and decision-making processes. An important attitude is to get started immediately, without hesitation. At the same time a greater possibility of expression arises when drawing is done more often, so it can and should be a recurring element. Repeated use also creates an individual graphic vocabulary: In order to supplement this, it is important to look at drawings of other learners or there is (also online) a lot of literature where the simplest basic forms that can serve as inspiration are collected. Trying out different pens and surfaces over time and collecting your own favourite drawing instruments step by step is also part of the process, combined with the openness to work with what is currently available.

Various forms of visualization support the process of making visible seemingly indescribable things and thus to a certain degree making them understandable and open to change. This also makes it possible to approach ‘difficult’ topics from the perspective of certain groups, which are associated with a lack of knowledge, strong emotions or prejudices and clichés, traumas or existential fears. The (common) drawing process helps to see topics, processes and connections from ‘outside’, even if people themselves are more intensively part of an event or system, perhaps feel at the mercy of it, overwhelmed by it.

In transformative learning processes, it is also good to use associative drawing:

- Drawing / painting is in many respects an associative process. The time for the drawing process should be limited: An individual graphic reflection can take place within one minute. The instructions are: “You have just experienced / seen / designed... Please take a piece of paper and sketch with the simplest means, a central insight for you / an open question”.
  - This can be used after a presentation, a visualization, or group work. It can also be a matter of quickly putting an idea of an abstract term or topic on paper.
  - A step based on this can then be the viewing of the drawing of one or more other persons in the group, combined with the invitation to be inspired by a single graphic element of the partner - this can also be a single stroke, a dot - and to integrate it into one’s own drawing. Here, too, the timeframe is kept short.

References


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The Oasis Game

Neža Krek

The origin of the Oasis Game is an inspiring story of a group of Brazilian architectural students who decided to rebuild a derelict local fishing museum as their final university project. As they were doing their field research, they realized the museum was closely tied to the local people living in poor neighbourhoods and surrounding favelas. To envision the possible future of the museum they did the unthinkable at that time: they organized facilitated envisioning sessions for the whole community. The people were so happy to have been given a voice in what matters in their physical surroundings, that the now-graduated students decided to bring this experience of collaborative design to the whole of South America. This was 1999.

Fast forward 20 years and we now see a strong movement for collaborative change happening all over the world.

The experience of co-created design of a better future in local communities grew into a 7-step method called The Oasis Game. This method is mostly used to bring change to the poorer parts of societies and the most inspiring success stories come from the worst favelas of Brazil. The Oasis Game has also been used extensively all around Europe with the Elos Foundation based in The Netherlands.
How does it Work?

1. The (appreciative) regard: In this step, locals go around their neighbourhood focusing on it through different senses (e.g. blindfolded) to appreciate the beauties of their home. That is how they learn to see abundance where many see scarcity.

2. Affection: This step is all about fostering kindness before fear and judgement. The volunteers and facilitators of the process are trained in the principles of Non-Violent Communication (described in a separate chapter). They use that empathy and their ability to see beyond the judgements of an abandoned, ugly, or undesired place. They speak to people and recognize their importance for the community. They point out their talents and invite them to contribute.

3. Dream: This step is all about dreaming a collective dream for a better future for the neighbourhood. Dreaming sessions with the whole community are organised where visions of possible futures are recorded. The inhabitants start seeing a collective dream emerge in the shape of a very practical manifestation. A collective dream of more safety in their surroundings might distil into a safe train crossing, or a fun playground in a safe environment away from traffic.

4. Care: Once the community has chosen a dream to realize, the care phase is all about nurturing the relationships that were started with the process. Planning and sourcing resources for making the dream a reality take place in this step. People get creative; they may arrange sponsorships, bring useful items from a nearby landfill, or collect raw materials from backyards etc. Circle dancing, music-making, cooking together, and bonding are essential for moving to the next step. Not to mention - super fun!

5. Miracle: This step consists of 2-4 days when the magic happens. This is when all the neighbours, local leaders, children, elderly, and volunteers dig in and make the dream become a reality. Maybe they build a whole playground from scratch together. Maybe they create a whole new signage system around a dangerous train crossing. Maybe they build a new building for the kindergarten that lost its previous space due to flooding. Maybe they create a recycling system that gives work to a few people collecting useful rubbish from the area.

6. Celebration: After days of hard work as a collective, it is of paramount importance to celebrate the accomplishment. In Brazilian spirit that involves lots of singing, dancing, hugging, and good, homemade food. It’s the moment when everybody takes a step back and recognizes what the collective achieved together.

7. Re-evolution: The spirit of celebration brings the wish for more. In this step, people start realizing the power they have as an activated, connected collective. The facilitating team, therefore, offers the last part of the game where they help the community imagine what else they can achieve now that they are aware of their talents, dreams, and strengths. After a facilitated World Cafe (described separately), the community reimagines what is possible, and hopefully starts a new cycle of change.

The Oasis Game has the power to transform whole communities. If you are not just a bystander, then you will be moved on some level.
A Challenge for the Facilitator

As a facilitator of this process, I have been challenged on numerous levels because the method requires you to be heavily involved, immersed even, in the local life. The participants not only see you as someone who knows what is next, but also as someone who can listen differently. You end up hearing stories of hardship, hopelessness, and loss.

At the same time, you have the privilege to witness people flourish when they get recognised for their talents for the first time in their life. You see whole neighbourhoods change their way of coexisting. In one month, they go from a group of people who believed they were nobody to a vibrant, empowered collective that takes life in their own hands.

A Story of Volunteering

A group of volunteers supports each Oasis Game. Bringing people from outside the community is an important part of the game. I remember participating in my first Oasis Game in the favela of Aldeia in Santos, Brazil. That time, I participated as a volunteer to familiarize myself with the process.

The place was illegally built on the river banks in the roots of mangroves. It was known for drug dealer rivalries, incredibly littered streets, and massive numbers of children dying on the train tracks where they played.

As we started our Dream phase, our team of facilitators set up a table to collect the dreams of the people. The local kids were all over, and there was laughter and joy. From a distance, the new drug chief observed our activities. After a few minutes, he motioned to us to approach him. We didn't know what to think.

A facilitator who had spoken to him before went for a chat and came back saying, ”We need to leave and set up our table at least 2 streets away.”

This is what the drug lord told her, “I see you are doing really good things for my people. I like that. I don’t want anybody from your team to get hurt but you know… we had some misunderstanding with the police and they might come here shooting. So, find a different place for the table. Just in case.”

On the table, now two streets away, we collected dreams of hundreds of people. The community wanted their kids to have a safe space to play so they would stay away from the train tracks. A week later, a playground was built from scratch by the whole community. There was no budget and yet, they found paint, car tires, wood, chains, and all the tools needed for this big project. A long boring grey wall that separated the favela from the local factory was painted by a famous graffiti artist inspired by the dream.

The people were in awe when they saw the transformation. Sure, the playground looked shabby, but that was never the point. The community used the excitement and connection that the Oasis Game brought very well. In the Re-evolution part, they started a recycling business and cleaned the place, set up a computer literacy programme for children, and a cooperative for the local women to sell their hand-embroidered textiles.

In Aldeia, real lasting transformation happened that would not be possible without a carefully and lovingly facilitated process. We, as facilitators and volunteers, were exhausted but happy.

References

Instituto Elos (Brasil) https://institutoelos.org/?lang=en
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Satir Change Model

Lana Jelenjev

Virginia Satir, a pioneer of family therapy, developed a model of how individuals experience change. She defined change as “an internal shift that in turn brings about external change.” The Satir Change Model says that as we cope with unexpected or significant change, we predictably move through five stages: Old Status Quo, Resistance, Chaos, Practice and Integration, and New Status Quo. Although developed in the context of family therapy, the model has been widely adopted to describe systems and organisational change. It describes the changes we go through as we experience significant change. It helps people improve lives by transforming the way we see and express ourselves.

1. Old Status Quo
   This is a state of familiarity. There are barely fluctuations in the day to day activities. This is considered to be the comfort zone.

2. Foreign Element
   In Satir’s model, the Foreign Element is the thing that disturbs the equilibrium and triggers chaos. It can be almost anything: a birth, a downsizing, a death, moving to a new place. The foreign element stirs a person’s state of familiarity and challenges one’s comfort zone or current situation. This is the situation that plunges people into chaos. Change doesn’t happen swiftly. Oftentimes there are barriers to change. Fear is considered to be one of the main obstacles to change.

3. Chaos
   In the Chaos stage, you are suddenly in unfamiliar territory where your life is unpredictable, and your usual behaviours do not work. This is the moment when the person or group re-evaluates and seeks support or service, e.g., coaching, taking workshops or participating in certain programmes. Chaos is a very creative time of exploration and trying out different ways. People come up with lots of new ideas when in Chaos. Eventually, one will be a Transforming Idea, an idea that helps you make sense of the Foreign Element.

4. Practice and Integration
   Once we have a Transforming Idea, we start on the road out of Chaos and toward practicing and integrating new ways of knowing, doing and being. The purpose of this stage is to master our new skill and knowledge, and integrate them into our daily lives.

5. New Status Quo
   There is now some degree of familiarity with new ways of working. New vocabulary, mental models and belief systems have emerged and are part of the daily practice. People are at ease and relaxed. Eventually, these new skills become second nature, and the learnings become assumptions and expectations. With time, the newness fades and the person settles into a sense of familiarity. The New Status Quo then becomes an Old Status Quo. And the change cycle begins again.
The Satir Change Model is a great tool to use in deeply understanding and empathizing with participants. In my work, I often use the process of “Start with Who” in designing transformational learning experiences, be it online or offline. It is crucial to think of the participants and their needs. In exploring the questions “Who are our participants? Who are we serving with our transformative programmes?” I use the Satir model to plot the life journey. It helps me to tune in to the needs of the people for whom the programme is intended.

I also use the Satir Change Model in digging deeper into the profile and personae of the participants using the AEIOU Method. I created the AEIOU method to plot the Activities, Environment, Interactions, Opinions and Understandings of the people who will participate in my programmes across the different stages in their journey.

Activities
What do they usually do? When thinking of activities, try to identify how they tend to use their time, energy and resources.
- What do they do for recreation or when they are comfortable?
- When faced with resistance?
- When stressed or in chaos?
What activities help them to be more grounded? What practices do they have? What rituals, routines and rhythms do they have?

Environment
Where do they usually go? Environment is all about figuring out where these people can be found.
- Where do they congregate?
- Which groups, clubs, hubs, organisations are they a part of?
- What is a common denominator with all these places?

Interactions
Who do they connect with?
- Who are in their relationship circle (their inner circle)?
- Who are in their “revive circle”? People whom they meet in networking events, have as casual friends or acquaintances
- Who are in their reach out circle? Who are the people that they aspire to connect with? These can be people who inspire them.

Opinions
What do they value and believe in?
- What is at the core of their values? What do they aspire to do or be?
- What are their motivators in life?
- What beliefs do they strongly hold and embody?
You can also dig deeper on the systemic part of their opinions by asking: how did they form these beliefs? How did their history (and ancestry) help shape their values?

Understanding
What do they know?
Understanding is meaningful learning. It means having an insight into a particular concept or idea and being able to share that insight with others. It requires knowledge and perspective. When thinking about what your participants understand, you can also think in terms of specific concepts, themes or domains that are important for them.
- What are these themes?
- What do they know about them?
- What are they “expert” at?

References
Start with Who worksheet designed by Lana Jelenjev

Using the Model to Design Transformative Learning Experiences
Enspirited Envisioning

Marilyn Mehlmann

In the 1980s I worked on a series of futures studies for the Swedish government, together with Professor Bo Hedberg from the Centre for Working Life. We developed a version of scenario technique, which I later used as a consultant with numerous organisations. The technique was very successful but I was not satisfied because it seemed to me that at the critical points in the process, too much depended upon the facilitator. Thus the ambition to have a truly inclusive and participatory process was partly sacrificed to the need for expert guidance. I wanted a process which would work independently from the content-influence of the facilitator.

Then I was introduced to Warren Ziegler and his Enspirited Envisioning (EE) methodology. This was what I’d been looking for: a transformative approach that gently elicits the deepest dreams, hopes and fears of the participants, enabling them to become full co-creators of their own visions of desirable futures - Competence 3.

Ziegler developed his methods during his tenure as professor of futures studies in Syracuse, NY. By the time we met he had retired but continued developing, facilitating and teaching until he died in 2004. He sometimes said that his methods were ‘only’ a modern version of Taoism, not least in their power to elicit deeply held images and wishes.

The core method within EE is Deep Listening (see chapter on Deep Listening). Each participant is enabled and supported to listen to themselves and to others in a deeply non-judgemental way. It has become integrated into many other workshops and courses, as a key to transformative learning.

Steps - individual
- Listen inward to one’s own images of the future: hopes, fears, expectations that are present but not necessarily previously recognized or articulated
- Listen to others’ images, usually in threes: each person is allotted time to describe her or his images while the others deep-listen
- Identify characteristics of a preferred future and make a poster
- Visit the poster gallery and decide which futures one could happily live in

Steps - group
- Coalesce in groups around a combined desired future
- Identify its characteristics

Steps thereafter are collaborative versions of general project design: stakeholder analysis, identifying first steps and resource requirements, organisation, risk analysis, planning, and not least: backcasting, or ‘future present’ (see chapter on Backcasting). For more information, see the book referenced below.
Context

Personally, I have co-facilitated EE in groups from 12 to 90 people. Some - the bigger ones - were open workshops with participants from different organisations. In particular my colleagues and I have worked with Swedish municipalities. There is no doubt that those organisations that followed through on the whole process achieved notable results, including for instance revising municipal infrastructure planning to better reflect the wishes and needs of the residents.

One municipality, for instance, created a strong movement to reinforce its character as in principle a network of villages, resisting the fashionable tendency to centralize. The biggest challenge is probably securing a truly long-term process. A recent (2018) report from that same municipality ‘20 years after’ showed that the initial impetus, while very effective, had slowed down considerably; the villages were intact but the enthusiasm had waned. No doubt the work could have benefited from booster events, perhaps at intervals of 7-8 years - an eventuality that was not foreseen in the methodology.

As a curiosity: at one workshop with about 50 participants from (if memory serves) 15+ municipalities, the entire group coalesced around a single desired future (right).

Reference

Envisioning — Enspirited Envisioning

Riding Complexity

Invoking all the Senses

New opportunities for transformative learning open up when all (or more) senses are engaged.

• A direct connection with the world of plants and animals can revitalize learning, for instance through Forest Bathing, or by locating some exercises to an outdoor setting; see also Section D.

• Interpersonal skills can move to new levels with such toolkits as Theatre of the Oppressed or Sociodrama.

• Works of art, whether pictorial art, film, sculpture, music, drama, literature or some other manifestation, are ‘designed’ to appeal in the first place to the senses and emotions rather than the intellect, which gives them an edge when it comes to opening for creativity.

Design, Including Process Design

The design of processes and products can have a profound influence on transformation — and vice versa. Design Science encourages people to be active and engaged with the world.

Designing a process means orchestrating the flow and the experience you wish your participants to have, as described in Section D. A process design scheme is a blueprint for the journey of transformation. Within that scheme you can use different tools from the many toolboxes, to suit the situation and your own style and preferences.
Transformative Dance

Hadas Fisher-Oren

Transformative Dance is a guided dance “journey” that releases the body, frees the soul and quiets the mind. This expressive dance meditation approach integrates movement, dance, body-work techniques and healing processes. It draws from the human potential movement approach that started in the 60s, which holds a holistic point of view on the human being and believes in the healing power of the moving body, as well as the importance of a supportive group in the process of self-development.

Carla Hannaford, neurophysiologist and educator, contends that all transformative learning passes through the filter of our senses; starting from our first sensory experiences as babies, which create new pathways in our brains, knowledge is deduced from experience in the physical world. From my perspective, in order to learn something new about ourselves and the world, there must be a physical dimension to the experience.

The essence of movement is everlasting change. Everything in our world is constantly moving and vibrating, even the things that look perfectly solid.

By learning and exploring movement we learn and explore the ever-changing nature of things, acceptance, flexibility and presence. I truly believe that deep transformation can only be acquired by tapping into the intelligence of the body and embodying the change. As a proof - try to be melancholy while skipping. See what I mean?

In the past 20 years I have been working in the field of dance, embodiment and movement as a dance facilitator, dance therapist and body work therapist. In the last few years I have started to train facilitators and share with them my insights and experience.

I have facilitated thousands of group sessions of movement and dance as a self-development tool with different populations. During my work as facilitator I have noticed that people are not always easily engaged with their own bodies and with the transformative power of dance, and I have started to explore what components, attitudes or strategies are needed in order to support participants going through this experience. As part of this ongoing observation and experiment I used a focus group. I invited a small group of people to participate in my movement sessions, and asked them to answer a questionnaire at the end of each session. The group met weekly for three months. As I gathered the answers, I shaped my sessions accordingly and gradually acquired much more clarity about how to help people move from a narrative state of mind into a holistic somatic and nondual state of being. Since then I have developed guidelines that support the process of transformation through dance that I use in my sessions.

Photos by Katja Harbi
The Process

Here is the core process from the participant’s point of view:

Intention ritual - setting an intention: what are you dedicating your dance to today?

Allowing and accepting - acceptance of what is already there (thoughts, feelings, impulses).

Mindful attention - as the body expresses and leads the movement, following and allowing expressive impulses. Respecting all forms of movement equally: big or small, repetitive or ever-changing, loud or silent and so on.

Expanding consciousness through exploring not only our own bodies but also the surroundings - the floor, the room, the other moving bodies in space. Starting to be inspired, attentive and reactive to what’s around.

Playful and supportive contact - partnering, exchanging and sharing a dialogue with another body. Moving within a relation in a playful and non-verbal way brings the participants to an open creative state of being and widens the limits of what is possible beyond their comfort zone, and sometimes beyond their familiar paradigms. This could happen with one or two partners, a small group of participants, or the whole group.

Discharge/letting go - Through the encouragement of the music and the facilitator’s words. Allowing any expression and involving more parts like imagination, emotions, sensations. Noticing any thought, feeling or image in a non-judgemental way as they move and change while the body moves, making room for them to be expressed and embodied in the dance. This part is conducted as a wave of rhythms that allows multiple different expressions and shades of bodily impulses. This in turn generates a cathartic expression that releases old tensions stored in body tissues and creates room for new; in the cells but also in the mind and heart.

Recharge - cultivate the energy, integrate in a silent meditation.

Sharing - see and be seen, express the treasures of this moving journey in the setting of the circle. Could be shared with words, movement, sound or any other expression and used as ending ritual.

A Facilitator’s Perspective

The role of the Transformative Dance facilitator is not to teach something new to the participants but to allow and support them to express and learn something new from their own holistic experience. I really like how Carl Rogers puts it: “I don’t believe that anyone has ever taught anything to anyone... The only thing I know is that anyone who wants to learn will learn.”

In the facilitator training I teach many different aspects of holding the space for transformative dance, some of them related to the setting and planning, some of them with the role and presence of the facilitator, and some of them with the key knowledge of movement and dance as a generator of change, awareness and healing. Here are three main themes I emphasise in the facilitator’s guidelines: Leading by following, A resource-oriented approach, and ‘The body is the gate’.
Leading by Following

“Leading by following” is a somatic adaptive leadership that resonates with and is attentive to the individual and group dynamic. Because our work is in a non-verbal dimension, facilitators use their own bodies as a sensory tool to receive information through body empathy, “kinaesthetic seeing” and resonation. Kinaesthetic seeing is a term taken from the Dance Therapy field and coined by Suzi Totora, referring to the ability of the carer/therapist to create embodied attunement by observing one’s own movements and somatic expressions. Resonation is a term used in body psychotherapy that relates to non-verbal dialogue (between people) and our ability as facilitators to get information from this field through our bodies about the needs and wishes of individuals and the group.

This praxis gives the facilitator inner flexibility, attentiveness and empathy and enables us to lead and follow at the same time; attentive equally to the outer landscape and our inner landscape, and the dialogue in between.

Leading by Following

This approach welcomes humour, encourages pleasure and play, and uses positive language. It uses the empowering aspects of a group dynamic. Demonstrates the body as a reliable, powerful source of intelligence, joy and pleasure.

For example instead of saying “don’t think about how the body looks when you move this way” the facilitator will suggest “feel your elbows and feet, how does it feel when you move this way” and might add: “find the most pleasurable form of this movement”. I believe that it is very important for a facilitator to be aware of the themes s/he brings to each session, encouraging the participants to move beyond their comfort zone but at the same time to make sure that the content is not too confrontational. For example, instead of creating a session with the intention of exploring loneliness through movement the facilitator will find an inclusive way to explore the theme “alone and together” in a somatic-playful way.
These tools facilitate a sense of exploration and full engagement. For example instead of saying “Put your hands on the ground and lift your knees and pelvis so that you create a pyramid with your body”, a Transformative Dance facilitator will offer and ask “Which movement can lift parts of the body off the ground? Is it a push? Is it leaning into the ground? Let’s play with the options available to us at this very moment”. The first example creates a focus on the shape and outcome of the movement, whereas the second creates a focus on the process, encourages curiosity, inclusiveness, full engagement with the here and now through playfulness and an exploration of the potential. More than that, and most important, this phrasing helps to heal the gap that our civilisation and disembodied culture create between body and mind. By addressing the body as an intelligent part of our self and not as something that needs to be controlled and “moved”, it grounds the participants in the movement itself in a non-dual way.

Bonnie Bainbridge Cohen, the founder of Body-Mind-Centring, once said “The study of movement is not about words, it is a direct transmission of life. However when words arise out of the subterranean field of aware movement, another knowing is realised.”

Holding the space for dance is a great privilege. I feel lucky every day to witness embodied transformations through movement and dance.

References
Hannaford, Carla, Smart Moves (1995), neurophysiologist and educator
Totora, Suzi, The Dancing Dialogue (2006), dance therapist
Transformative Dance & Transformative Dance Facilitators Training https://www.transformative-dance.com/the-journey
Design Thinking

Ursel Biester

Design Thinking (DT) is a set of methodologies in combination with a five-step iterative process: the steps may repeat in any order. It is widely used in innovation. You can innovate a lot of things: a product, a service, a whole internal process in an organisation e.g. the process of hiring people or even your own life (see chapter on Life Design). DT is used in businesses, NGOs, start-ups and is trendy right now.

A DT process can extend from one day to several years and be run with one group or with several in parallel.

Opportunity for transformation

DT is a double-edged sword. Like any tool it can be used for the good and the bad. It carries the potential of re-inventing our consumer society; however, it can also be used to design more items to consume.

Fortunately DT tends to transmit the culture of the community using it, which today is largely dominated by Millennials with a “green conscience” and an attitude of “all is possible”. DT reflects its history (product design + research on cognition) and is colourful, rather loud than quiet, energetic and fun in an active, extroverted way.

Design Thinking is all about people generating ideas and exchanging these ideas in the innovating team. Depending on the heterogeneity of the group, individuals may get confronted with ideas that deviate from their own worldview. People get exposed to real-life situations and are asked to empathize with as many entities in that situation as possible. This change of perspective can lead to insights that bring transformation to the mind, however not necessarily so.

Will it Change the World?

I used to believe that DT would change the world for the better. I thought if we only get people to empathize with the planet they will create products and processes that are benevolent to people and planet. My experience was that people in the business world did not put emphasis on empathising with the planet. Their focus was on the question: how can we maintain our leading position in the market? Form follows focus: they came up with solutions to that question, disregarding disconfirming perspectives.

I believe DT can be used to enlarge people’s minds; however the ethical dimension is not inherent in the tool. If the facilitator provides a focus on empathy, it can be a very effective and fun tool.

References

DT courses:
One big provider in the field is https://hpi-academy.de/en/design-thinking/what-is-design-thinking.html

DT with an ecological edge to it: https://www.schumachercollege.org.uk/courses/postgraduate-courses/eco-logical-design-thinking

Online courses: https://www.ideou.com/
https://www.plusacumen.org/courses/facilitator%E2%80%99s-guide-human-centered-design

Further topics on Acumen+: Introduction to human-centred design, Prototyping, Designing environmental sustainability, Strategic storytelling, Systems practice
Social Presencing Theatre

Manuela Bosch

Social Presencing Theatre (SPT) is an art form and “social technology” that brings together social change with creative expression. Through a synthesis of mindfulness, creative embodiment, and group dialogue, Social Presencing Theatre directs our consciousness to our own body, as well as the social body, and its deeper knowledge.

The word “Social” stands for people and groups, like in organisations and social systems. We are exploring social fields in practice. “Presencing” derives from two words: presence and sensing. It is a combination of being conscious (i.e. of my own body), and being aware (i.e. of the space and everyone around me). It refers to the quality of attention we practice in Social Presencing Theatre. Finally, “Theatre” stands for embodied play in its original form – a tool to raise awareness, to make invisible things visible. These things can be hidden social dynamics, blind spots, or forgotten resources.

Social Presencing Theatre is part of Theory U, a framework for effecting change personally and organisationally, in communities and globally (see chapter on Theory U in this book). Social Presencing Theatre has emerged during the last two decades from the life’s work of American artist, dancer and meditation teacher Arawana Hayashi and her collaboration with Otto Scharmer.

The practice has spread to thousands worldwide through courses and online programmes. It is applied in facilitating group and organisational change in such different areas as, for example, education, business, art, and social justice. But it is not a means for improving and fixing things. It’s a social practice for mindfulness, awareness and fresh insight around leadership challenges related to social systems.

The basic assumption in the practice is that everyone attending is sane and whole, that there is no-one and nothing to fix or repair. When we share, we own our feelings and perceptions about the other. We respect each person’s reality as truthful. Our leading principles are “curiosity” and “loving kindness”.

Social Presencing Theatre is based on a principle called, in Japanese, Ma. It literally means “interval”, or “between”, but in Japanese art it refers also to a cultural paradigm-shift in the way of seeing and attending to something and one another.

There is a habitual tendency for many of us to focus our attention on the content (i.e. material part) of an object, or the words and actions between people. Ma reminds us to expand our attention to the space between, like to the environment and the atmosphere. For example when we look at an object like a drinking glass, many of us notice the solid, transparent material the glass is made of. However, what makes the glass useful is the space between the material that can hold water. The same applies to a door: we see the wood or material it is made of, the hinges and handle, but the empty space to walk through actually makes the door. In groups of people this empty space is our way of being together, the communication between and beyond words, how we relate to one another. Social Presencing Theatre is an invitation to discover more spaciousness and openness in our daily living and our working with others.

In Social Presencing Theatre we experience Ma and what can emerge from it through simple awareness-based body exercises and more advanced constellations of systems. Letting Ma lead is a way of exploring what naturally wants to happen, not what you think should happen. You start to listen to, and learn from, your “stuck” situations in life by noticing your body in the present moment and in relation to others. In that way things can fall naturally into place, without thinking hard. Practiced in organisations and social movements, it can help more constructive, collective things to happen, without the need of a central role to develop and implement a strategic solution for it.
I have been leading Social Presencing Theatre workshops and practice groups since 2014, and also offer consultation to teams and organisations. I find it an extraordinarily powerful tool to help people talk about the “elephant in the room”. That is, an important or enormous topic, problem, or risk that is obvious or that everyone knows about, but that no one mentions or wants to discuss because it makes at least some of them uncomfortable or is personally, socially, or politically embarrassing, controversial, or provocative.

Usually I am not directly invited by those organisations or communities to bring up the elephants. I am asked to help with vision and strategy design, to strengthen the community spirit, but surely also to help them dive into topics that usually don’t have space in the everyday. Whatever their goal, when they are open to experimental, unconventional methods, I recommend them to start with some Social Presencing Theatre work, to “clear the table”.

My sense and own experience is that individuals are often not aware of how much of a burden certain challenges at work are to them, or they only have a very specific perspective on things, or they don’t have words for what they feel deeply. Probably most important, they simply don’t have the space to creatively, collectively engage with what’s going on. Words are often not sufficient to get behind the social dynamics at work. I am talking here not necessarily about interpersonal conflicts – though they might be a symptom. I am talking much more about challenges that arise from being part of complex social systems, where economic questions meet personal needs, environmental challenges, political conditions, and so on.

What I’ve experienced is that Social Presencing Theatre empowers individuals to realize and share what’s in their hearts. This way it supports groups to do some long-overdue straight talking in a respectful way. This builds the capacity to collectively, and in agreement, name the direction for the next step.

References

There are several different ways to learn more about Social Presencing Theatre. Various materials in form of texts, articles, pictures and videos can be found on Arawana Hayashi’s website, https://arawanahayashi.com/social-presencing-theater.

Instructions for some of the core practices: “20 min Dance”, “Stack Dance” and “4D Mapping”, can be found on the Website of the Presencing Institute, https://www.presencing.org/resource/tools.

For a comprehensive overview of worldwide Social Presencing Theatre basic 2-day courses see the most recent Social Presencing Theatre newsletter https://arawanahayashi.com/read.

Social Presencing Theatre Practice Groups can also be found around the world. In Europe they currently take place in Cologne, Amsterdam, Sintra, Paris and Berlin.
The Theatre of the Oppressed

Christian F. Freisleben

The Theatre of the Oppressed is a ‘family’ of theatrical methods that the Brazilian theatre practitioner Augusto Boal first elaborated in the 1970s, initially in Brazil and later in Europe. Boal was influenced by the work of the educator and theorist Paulo Freire.

The creation of the Theatre of the Oppressed is largely based on the idea of an intense form of dialogue and interaction between audience and performer. The “difference” or the gap between them vanishes and is replaced by a flow between performing, watching and reflecting. The approaches used are very similar to those of Moreno – the founder of psychodrama who first worked with spontaneous theatre. In this way different situations, structures or processes not only can be consciously perceived and analysed, but a wide variety of forms of action can be developed and practiced.

Theatre of the Oppressed uses approaches that can also be applied in educational settings to foster a very intense way of learning. Students have the possibility to play and to observe at the same time. They can contribute topics and problems from their own social systems, and collaboratively it is possible to find solutions that can be integrated in these environments. Therefore Theatre of the Oppressed can be viewed as a format of Applied Theatre - playing and learning are a duality in the development and performance of theatrical pieces. At the same time, visitors are not only watching a performance, they very quickly become a part of it, bring in their own topics and ideas, practice and evolve them together. It is a very intense form of transformative learning.

There are several main methodological approaches, notably

- Image Theatre
- Transition Statues
- Forum Theatre
- Newspaper Theatre
- Rhythmical Reading
- Rainbow of Desire

Image theatre is a performance technique in which one person, acting as a sculptor, moulds one or more people acting as statues, using only touch and resisting the use of words or mirror-image modelling. With the help of these statues it is possible to explore structures and conceptions of the mind. Attitudes and prejudices become visible and also possible variations of perceiving other people and yourself. It is also possible to visualize concepts, historical events and possible future developments, the story of a conflict and how it can be solved, the transformation of a single building or a whole city district in a sociocultural way. A variation is transition statues, e.g. for approaches that uses biographical events of the people involved or to capture potential positive development of one person or a whole team.

In Forum Theatre, the actors or audience members can stop a performance, often at a short scene in which a character was experiencing a situation of failure, oppression, frustration, resignation. The “audience” can propose any solution, by calling out suggestions to the actors who improvise the changes on stage. Or a member of the audience replaces the protagonist to show the idea in a very intense form – they are coming on stage as “spect-actors” to replace the protagonist and act out an intervention or idea. Through this process, the participant is also able to realize and experience the challenges and possibilities of achieving the improvements he/she is suggesting. The aim is to discover all possible paths which may be further examined. The “spect-actors” learn much from the enactment even though
the acting is fiction, because the fiction simulates real-life situations, problems, and solutions. It offers a "safe space" for practicing making change. When faced in reality with a similar situation they’ve rehearsed in theatre, participants who have experienced Forum Theatre ideally will desire to be proactive, and will have the courage e.g. to break oppressive situations in real life. An important role is that of the joker, a person who helps people to get into the role and to step out of it, he or she also provokes unusual approaches, ideas, moves in an intense way.

Newspaper Theatre is a system of techniques devised to give the “spect-actors” a way to transform daily news articles or any non-dramatic pieces to the theatrical scene. A news item or scientific literature is read, detached from its context. It is combined with other texts, which are read in alternating form, complementing or contrasting each other in a new dimension. Or information generally omitted in a public discussion is added to the text.

Another variation is Rhythmical Reading, in which words are read out in different speeds, dialects, emotions. Another approach is parallel action by combining words with non-verbal theatrical short interventions.

Rainbow of Desire is the title of a format in which the multiple shades of fears and hopes interact. In that way it is also possible to give a voice and a body to a particular step or method of a project, enabling interaction with creators or possible users. I have been using all these variations in various settings. It is amazing to see the effects of empowerment and transformation. The input is mostly given by participants, who play and perceive at the same time. Ideas and concepts thus emerge through manifold perspectives and a spirit of intense collaboration. For instance I have used it with a group of nurses: Together they developed a possible solution to cope with a team leader who didn’t value their work on a professional and personal level. They cried a lot but at the end, laughter was stronger and afterwards they told me that they really were able to have a good talk with the team leader, who also had the secret wish to get “closer” to his team members.

All these variations require:

- Getting to know the methods by experiencing them as an active participant
- An intense experience as a facilitator who is also asking for supervision
- Continuous reflection on one’s own acting and guidance

References


More background on TO https://beautifultrouble.org/theory/theater-of-the-oppressed/

Appreciative Inquiry

Jasenka Gojić

Because of its impact on the attitudes and perceptions of those who use it, Appreciative Inquiry (AI) is not only a method, but is often seen as a philosophy. As a method, it is useful for initiating personal, group, organisational, social and global changers. Emphasizing positive attitude and future orientation, AI can easily provoke transformative effects.

A methodology based on six principles:

- **Constructionist Principle:** reality comes into existence through relationships, words create worlds, hopes arise from other peoples’ experiences (Hearing Other People’s Experience)
- **Anticipatory Principle:** expectations guide our behaviours; for transformational change, a vision of a desired future is needed
- **Principle of Simultaneity:** the act of questioning starts a change
- **Poetic Principle:** the beauty (of the world) is in the eye of the beholder and others realize this through stories; metaphors carry experiences from one world to another
- **Positive Principle:** hope, joy, excitement, community, inspiration, attention…
- **Principle of Wholeness:** we are all interconnected and each part influences the whole; change in one part triggers change in the whole.

**Questioning**

- Stimulates creativity
- Motivates fresh thinking
- Uncovers underlying assumptions
- Focuses intention, attention, and energy
- Opens the door to change
- Leads us into the future

From “The Art of Powerful Questions”, by Eric E. Vogt, Juanita Brown, and David Isaacs

**Positive Questions**

- Have an affirmative tone
- Are based on partial assumptions and open for further possibilities
- Broadly define areas for inquiry
- Include an invitation which allows a variety of possible solutions
- Consists of words that resonate positively
- Provokes stories full of energy
- Encourage storytelling

**Before Questioning Check**

- Is this question relevant to real life and the real work of the people who will be exploring it?
- Is this a genuine question – a question to which I/we really don’t know the answer?
- What “work” do I want this question to do? That is, what kind of conversation, meanings, and feelings do I imagine this question will evoke in those who will be exploring it?
- Is this question likely to invite fresh thinking/feeling? Is it familiar enough to be recognizable and relevant – and different enough to call forth a new response?
- What assumptions or beliefs are embedded in the way this question is constructed?
- Is this question likely to generate hope, imagination, engagement, creative action, and new possibilities, or is it likely to increase a focus on past problems and obstacles?
- Does this question leave room for new and different questions to be raised as the initial question is explored?

Adopted from Sally Ann Roth
Public Conversations Project c. 1998
The 5D model represents the method as a sequence of five phases in a spiral. The phases are distinctive but interconnected. They blend into each other. Each new phase clarifies the results of the previous, and each circle in the spiral exhibits more concrete change effects.

**DEFINE**
AI starts with the definition of the question itself, defining as precisely as possible our wants and impulses that disturb us, detecting a challenge: a call that motivates us to change. This phase results in a positive question, generated after prioritization and selection. The choice is based on the feeling that this is the right time, and that the question resonates in ourselves and others, together with the impulse for change which is irresistibly strong.

**DISCOVERY**
Search for “family treasure”, those things that provide life when we are on the top of our being and doing, those things that make our everyday life worth living, and those things that we do not want to lose whatever we change. Discovery could also be focused on good sides of hard times, in periods of hardship. In AI terminology the treasure is called “positive core” – the proof of what is possible, the hope that there could be more good in life. The treasure is buried in memories that can be recalled by storytelling about positive past experiences, and conditions that encouraged or made those experiences possible. After analysis of the stories, a list is made of the best things, experiences, habits and ways of doing that should be preserved.

**DREAM**
Dreaming is a sign of possibilities, especially if it is common, collective, family. It focuses our attention, makes our intention stronger, influences the way we speak, inspires our action. Dream is woven around the positive core after identification, awareness and generalization of details from stories being told in the previous phase. Dream is our own new inspirational story!

**DESIGN**
Creation of possibilities. This phase is between the “preject” and “project” part of the process, it connects dream with reality. To perform in this phase, one ought to act as a designer, taking equal care for the function and implementation or construction, as well as materials used. Dialogue about dream realization results in a provocative proposal, which is a concrete wish for a positive change. The proposal is sustainable if it combines social benefit with health and wellbeing as well as financial prosperity with environmental care.

**DELIVERY or DESTINY**
The implementation of a change is very often only an impulse for new AI gatherings, summits, conferences, and serious conversations. If all stakeholders interested in the inquiry were represented during the AI process, their personal and group devotion to dream implementation would be present and strong. The powerful questions provide psychological and physical momentum.

**Provocative Propositions**

**Examples:**
- Stretch and challenge
- Are desired (people want to create them)
- Are exciting and use energizing language
- Represent things people really believe in
- Describe what is wanted in a positive way (rather than saying what is not wanted)
- Are written in the present tense as if they are already happening

**Croatia – a country of healthy, joyful and entrepreneurial people.**
My job is creative and cooperative, a source of abundance for me, my family and all who are involved in it.
Organisations exist for the full realisation of human potential.
Our daily food intake is based primarily on food produced less than 20 km from our home.
Context
AI design of an event is commonly used for initiating organisational changes accompanying a whole system approach.

On a small scale, the power of positive memories can be employed at the beginning of an event. Participants work in trios. One asks questions, one deeply listens for answers, and the third observes. They change roles three times, in order to invoke good feelings, hope and self-confidence in their capacities. Usual questions follow the pattern:

Recall a time or event when you felt the best, the most alive, really involved or proud. Tell your story: what happened, when, how did you feel…?

What made this experience possible, inside you and in your environment? Which of your competences were crucial? What was critical in your surroundings for your extraordinary experience to happen?

Based on this story, which of your values would you like to manifest in the future?

Transformative Edge
AI promotes a positive approach to any situation. It focuses on discovering personal and collective potentials in existing stories, memories and experiences, bridging good feeling, self-confidence and a constructive approach.

AI has the power to transform the perspectives of participants on frustrating, draining experiences. Positive questions are a great way to approach any enquiry, notably when asked by leaders.
I have used the Appreciative Inquiry model for many years as a basis for Initiating positive change workshops for individuals in search of a “new meaning of life”.

Participants start with anchoring a positive question that is right for them, following their longings. They usually come with an idea about practical changes, and we search together for deeper needs. In the discovery phase, they recall positive experiences in which the need was met. They share their stories, evoking feelings, and analysing their talents and the context which enabled the experiences. With that assurance that their needs could be met, and a lived feeling of satisfaction, they create their new stories. They daydream about what life would look like, if the needs were met. They write a story about their life seven years in the future, noticing which aspects of life are preserved, and what changed. As a prototype, they visualise their story. The last step in initiating positive changes is to influence personal destiny with very concrete decisions about long term goals. They share their plans with each other and ask for support and feedback.

For better effects, group development and internalisation of insights, the workshop is organised in six sessions, one a week for six weeks, three hours per session.

References

The source and centre of the method is Case Western University, Cleveland, USA. Appreciative Inquiry Commons provides reliable information and a bibliography: http://appreciativeinquiry.case.edu/

Practitioners have formed a European community of practice around Appreciative Inquiry and Strengths-Based Change: http://www.networkplace.eu/

There is also an international journal, AI Practitioner: http://www.aipractitioner.com/

See also chapter C. Community of Practice (CoP)
Living Knowledge

Robert Gilman

Context

There is a long philosophical tradition of searching for timeless, context-free knowledge. Plato’s forms are a good example. The Age of Enlightenment search for universal truth is another. That orientation felt well supported when we thought Newton’s Laws were absolute and when we interpreted the world around us as a vast machine. At a deeper level, it is supported by seeing the world around us as a warehouse full of discrete objects (rather than seeing systems and relationships) and by thinking in language-based categorical terms.

Today, we live in a world where knowledge is constantly evolving and we are discovering that living systems (complex adaptive systems) are a better model for interpreting the more interesting aspects of the world, such as the biosphere and society. Nevertheless, many people still think in the old terms, in no small part because they aren’t familiar with a practical alternative.

Living Knowledge, as a method, provides such an alternative. It generalizes the well-established technical process of using multiple maps (or diagrams) to provide detailed information about a complex territory (or subject) – as in the multiple layers of a Geographic Information Systems (GIS) map or the multiple drawings for an architectural project. In this method, any subject can be approached as a territory, i.e. something where you (more or less) know the boundary but you know you don’t know all that could be known about that territory.

Treating the subject as a territory is an invitation to learn and a recognition that there is always more to learn. What we do know and learn about the territory, we put into maps (understood metaphorically), which we understand to be partial, selective and provisional representations of the territory. Partial because we know the map is never as complete as the territory. Selective because the mapper creates the map for a specific purpose and chooses what elements to include based on that purpose. Provisional because there is always more to learn. These generalized maps may be descriptions or diagrams or anything else that serves the purpose of the mapper. (eds. note: take a look at the TL-territory map we created)
This approach leaves behind the search for timeless knowledge by recognizing that there is always more to learn. It is thereby more humble and dynamic. It also helps to break the widespread monopoly that object-based perception and categorical thinking have over our minds. Language is inherently object-oriented and categorical since words are essentially either names for objects or labels for categories. The need for common, shared definitions for words further deepens the tendency for language-based thinking to be categorical.

Living Knowledge uses visual and spatial metaphors and actual representations to escape this trap. When we approach a subject using the metaphor of territories and maps, we expect there to be multiple maps — each partial, selective and provisional — that can fruitfully co-exist with each other. Important metaphors within this approach that offer alternatives to object-based perception and categorical thinking include:

- Composites
- Layers
- Sliders
- Signal and noise
- Spaces
- Fields
- Systems

[Editor's note: Take a look at the chapter "visual communication" for another alternative and practical tools.]

As I’ve shared this approach with people via the Bright Future Now programme (see insert in Section A), I often hear the following:

People shift from (often unconsciously) seeing themselves as an object to seeing themselves as a territory full of inner multiplicity, complexity and mystery. This experience is liberating and brings a deeper self-compassion and inner peace.

People start seeing other people as territories full of inner multiplicity, complexity and mystery. This leads to greater understanding, compassion and ability to communicate.

Object perception and categorical thinking are quick but low-resolution ways of dealing with the world. Territories and maps allow much higher resolution and reveal new win-win solutions to seemingly intractable problems.

When two or more people share the ability to switch into the Living Knowledge approach, they can shift what initially looked like a conflict into a shared design challenge and an opportunity to better understand each other through sharing their maps without struggling over which map is "right".

The Transformative Edge

A Mutual Learning Journey

It’s what Life does

The Living Knowledge approach is pragmatic in the same way that living systems are pragmatic.

Identify your territory of interest. Gather and create maps that serve your purpose. When you feel your maps have given you enough insight/direction so you can take a step that feels "good enough for now, safe enough to try" then do so. Learn from the way the world responds to your step. Keep iterating — just like life does.

"Good enough for now, safe enough to try"

Sociocratic principle
Genuine Contact™

Neža Krek

Towards the end of my studies, I discovered facilitation. My mind was blown away. What? All the things I love doing have a name and can be a profession? I wanted to learn it all. That lust for learning led me to follow courses on Future Search, Art of Hosting, The Oasis Game, Non-violent communication, Deep Democracy, Holacracy and more. All in the pursuit of ‘the’ method I would then use in my facilitation practice.

Every time I dove into a new method, I thought “This is it!” only to find something that didn’t align with what I wanted to bring to this world. Then I was introduced to Genuine Contact and the approach to facilitating organisational change spoke to me in a profound way.

Genuine Contact aims to bring exactly that: genuine contact on all levels of the organisation. In order for a transformation to happen and stick, the individuals in the organisation need to be in genuine contact with themselves, in genuine contact with their immediate surroundings (team, department), and in genuine contact with the larger context (organisation as a whole, the system, the world).

No wonder the motto of the approach is “Genuine Contact a holistic approach to organisational excellence.”

The Genuine Contact Programme emerged from Open Space Technology (see chapter on OST). It was developed as a way to build capacity inside organisations to bring the energy and efficiency experienced in OST meetings into the everyday life of the organisation. The programme consists of 9 modules taught inside the organisation, one of which is “Working with Open Space Technology”. For more information, see the referenced web site.

Facilitators working with this approach profoundly believe in the following.

1. Every organism (including the organisation) has within it a blueprint for its own optimal health and balance. It’s paramount to trust people in the organisation to know what’s needed for optimal effectiveness. Building on the strengths within the organisation is key to optimal effectiveness.

2. Focusing on genuine contact enables individuals and organisations to achieve the health and balance that is needed for optimal effectiveness. Positive change in the organisation is directly linked to positive change in individuals. Both are required for sustainable new ways of working.

3. Spirit (or conscious energy) matters. Through spirit, all of creation is connected, and people are precious. Our experience is that strategies based on these values have exciting, tangible results.

4. Change with its accompanying loss, grief work, and conflict is constant. Organisations that master working with change will be able to sustain optimal effectiveness. The leaders in these organisations recognize that change cannot be managed. Therefore our best use of collective and individual energy in an organisation is to work with change, rather than against it.

5. Simple frameworks and processes enable success in complex situations. In keeping it simple we recognize that any sustainable change must begin on the inside and cannot be externally initiated or driven.
At first, I had a kind of love-hate relationship with these 5 principles of Genuine Contact. I loved them from the start because they made so much sense. They were telling a story about a possible world I wanted to contribute to building.

At the same time, a part of me hated them because they challenged so many of my hidden limiting beliefs I picked up along the way to adulthood:

- That people know what they need? No way, the teacher in me said - they need to be told what is best for them.
- Working with emotions in organisations? Yeah, right, my former boss would never do that! There should be a clear separation between work and personal life.
- Teams can self organize if they have clarity about the boundaries of their playground? No, you need to show them the way, said the scouting leader from a past regime in me.

With time and by practising this approach, I was challenged to step into the background and really listen. I needed to step over my own ego and take a hard look at my personal filters I had (or still have) towards certain types of people. Yes, it was hard to recognize I had judgements about certain races, language accents and people with glasses (I know, weird) but the inquiry gave me an awareness that is essential for my practice. Now I can enter the room knowing I will be facing these judgements. That’s a fact. However, that knowing will enable me to create spaces where my participants will ultimately feel accepted for who they truly are and not as shadows of my judgement.

Through practising GC, I experienced the relief of not needing to know all the answers because I learned how to trust the wisdom of the crowd. I received words of profound gratitude from my clients who felt seen for the first time in their teams. First by me and then by their own coworkers, at the end by themselves.

Last but not least, I remember the joy I feel every time when the participants engage with the chosen topic and dare to explore the depths of their souls as they step into genuine contact with their talents, dreams, and the world around them.

References

www.genuinecontact.net

Book: The Genuine Contact Way by Birgitt Williams
Dror Noy

I have been engaged with Dragon Dreaming since 2012, after taking part in a big social movement in Israel, “the tent movement”. That was where my own transformation started. Maybe you know this feeling: Being part of a large scale movement that for some moment gives you that amazing feeling that together we can really change the world. If you don’t know it yet, just imagine your heart dancing with your brain and adrenaline running in your veins. That was the feeling I got during this summer at its best moments.

In other moments it was very challenging, calling for both personal and collective transformation. The way leadership happened in this movement was creating a deep dissonance for me personally and for many of my friends in the movement. Often during this summer I was asking myself if we are really behaving differently in the way we work together. I quickly began to notice how ego and power dynamics started to rise, from a small collective shifting into a political group where there is one leader that gets or takes all the attention while the other people slowly fade away, back into their home and life. The decision-making processes became based on power and the person with the loudest voice got the most time, minority groups were pushed aside and conversations lost their clear purpose and results. A bit later the momentum of the movement started to slow down, I remember my friend telling me “The movement lost its heart” or “We become the opposite of what we wanted to be”.

I started wondering what other methods and leadership approaches there are that can allow more people to work together to achieve personal and collective goals and by doing so transform the culture and the way we do things. I was asking myself how we can engage more people in transformational change so that people can lead the change they want to see in their world; and how we can find new ways to communicate and lead change in a more collaborative way, so that we can give space for personal growth and transformation, and eventually get tangible results.

A Hero’s Journey

With these questions, I started my own hero’s journey (eds. note: see chapter on Hero’s Journey) to discover methodologies that can not only transform the outcome of our work but can also transform our hearts and minds, and can support us in navigating the complexity of our time in a sustainable way.

Two years later in the South of Spain, my journey led me to Dragon Dreaming: a philosophy and methodology created around 1990 by the Australian John Croft (1949) and his wife Vivi enne Elanta (1951-2004) as part of their work at the Gaia Foundation in Western Australia, of which they were the co-creators. The inspiration to create Dragon Dreaming came from Croft’s work as the Community Education Coordinator for the World Bank with indigenous people of Papua New Guinea. He later developed it as a methodology for implementing the projects carried out by the Gaia Foundation.
The Philosophy behind Dragon Dreaming

“Aboriginal culture is the oldest on Earth and has lived in Western Australia for at least 70,000 years. These Aborigines call themselves Noongar or Nyungar, a word that, in its ancient language, means simply people”

Croft 2014 - #4, 4

Think of the many legends that surround dragons: usually it guards a treasure. The Dragon represents our fears and also the strength to overcome them, to “get out of our comfort zone”, “dance with our dragons”, dare to realize our dreams and find our treasures, for ourselves, our communities and the entire planet. Originally, Dragon Dreaming was called Waugal Dreaming: Waugal is the rainbow serpent in Noongar mythology, recognized as the creator of life and all beings.

The Four Definitions of Dragon Dreaming

There are many possible definitions of Dragon Dreaming, depending on what we are dealing with:

1. It is a philosophy, therefore also a culture, for teams, communities, projects, and organisations.
2. It is a meta methodology with influences from a varied range of ideological, methodological and project management sources.
3. It is multiple toolboxes for trainers, entrepreneurs, leaders, etc.
4. It is a community of people, facilitators, projects, and organisations that cooperate to satisfy their individual and group dreams.

“Since its beginnings, Dragon Dreaming is based therefore upon the premise that no one should ever undertake a project alone. It is based upon mobilizing members of your own invisible community network; friends, family, colleagues, neighbours or acquaintances, to join you to work in making your collective dreams come true”

Croft 2008 - #4, 10
The predominant current of thought in Europe and other so-called "developed" societies has created a vision of the world that categorizes and separates everything into subjects and objects, active or passive, over which we can have "power-over" (Kahane). Thus, people have power over other people, people over animals and plants, developed countries over developing countries, rich over poor, etc., and everything is constructed or destroyed in Win-Lose relationships. Dragon Dreaming is meant to create Win-Win-Win relationships that transform "power-over" into "power-with", through more collaborative, collective and connected relationships. This is the fundamental pillar for the Dragon Dreaming Culture, where each project aims to generate satisfaction at three levels: Personal, Collective, Global.

Win-Lose vs Win-Win-Win

Therefore, the three principles of Dragon Dreaming Culture are: Personal Growth for all the people involved in the project. Therefore, a Dragon Dreaming Project aims to expand our capabilities and invites us to leave our comfort zone and our self-imposed limits to achieve our fullest potential, whilst empowering personal inner work and self-care.

Community Building, to strengthen the communities of which we are a part. A community has a broader meaning than a group or team. The community can be defined as the links and local exchanges that unite us, and a true community is characterized by the quality of the communication of the people that form it.

Service to the Earth, for the maintenance and improvement of natural life. Human beings are at a point where we take more from the Earth than we give back. For example, we pollute more than we reforest, we extract more than is regenerated, etc. A Dragon Dreaming project is designed to reverse this and give more in return to the Earth than we take in terms of natural resources and wildlife.

Dragon dreaming in Action, Cantabria, Spain, 2018. Part of a workshop where we filmed the documentary about Dragon Dreaming and the great turning. Photo: Dror Noy

Transformative Edge

"Engaging with the environment means we are engaging with a living world of which we too are a part. To believe we can take control of this world through "power over" is a human myth, an egotism which will lead to frustration and heartbreak. We cannot control the process of flow of energy, matter, information and the chaos or entropy in which we are embedded. Aboriginal tradition suggests that nothing is separate too – and science is proving this over and over" – Ilona Koglin (2013)

References

Croft, John (2008). Fact Sheet Number #4 The Great Turning: a Breakdown or Breakthrough?
Croft, John (2014). Fact Sheet Number #17 The Power of Consent.

Some great resources to enter the world of DRAGON DREAMING

Dragon Dreaming international website: www.dragondreaming.org
A DRAGON DREAMING Project Design e-book (available in 10+ languages):

Dragon Dreaming In Action: A guide to designing projects for personal growth, community building and service to the Earth, Ramos, Julia and Beatriz Gallego,

‘Dragon Dreaming and the Great Turning’ a 40 min film about Dragon Dreaming

THE ESSENTIAL CORE OF DRAGON DREAMING: SPREADING THE CHANGE by John Croft -2014

Power and Love: A Theory and Practice of Social Change Book by Adam Kahane
In 2013, I co-authored a paper with several scientist friends on cultivating complexity thinking in social-ecological systems (Rogers et al. 2013). An assertion we made in this piece is that too much of our understanding of complexity is intellectual. There is very little that embodies what complexity philosopher Edgar Morin would term “lived complexity.”

Many academic and professional disciplines abound with mentions of complexity. Most of the literature is dominated by an intellectual understanding and theorising of complexity. Morin asserts that “Scientists who do not practically master the consequences of their discoveries, do not control the meaning and nature of their research, even on an intellectual level” (Morin 2008:4). In other words, real understanding can only come from an internalised intersection of understanding (intellectual) and practising (lived). Nowadays we see a lot of what Morin calls pseudo complexity thinking: approaches and people who define themselves in opposition to linear reduction approach-es but whose practices are still informed by a reductionist paradigm that believes that we can fully know our social–bio-physical reality and that we are able to map paths into the future definitively.

“They display all the distinctly reductionist habits of expecting to come to “know” the problem and objectively find the “right” solution by dividing the problem into discrete elements to be tackled by experts who “know” how to do it. Any range of solutions can be tried because, if they go wrong, they can be reversed with little consequence for the system. They will expect, consciously or unconsciously, that once the “real” solution is found, the problem will go away and they will now have an “evidence-based” decision that can be applied again should “the” problem emerge again. (Rogers et al, 2013)

This is problematic, as the world very much needs practical ways of applying complexity thinking to ever more pressing intractable problems. There is hope however. All human beings actually have a lot of lived experience in complexity that we simply forget about (or disregard as irrelevant) in professional or work contexts. As we negotiate city life, traffic, social complexities in families or friendships and raising children, we are effectively engaging complexity.

In this 2013 paper, we attempted to make explicit some of the tacit heuristics that we collectively cultivated over many years of working in complex systems. We framed them as habits of mind.

Habits of mind to thrive in complexity

“A habit of mind is a pattern of intellectual behaviour that leads to productive actions. Habits of mind are seldom used in isolation but rather in clusters that collectively present a pattern of behaviours.”

We identified three interde-pendent habit clusters or frames that we consistently apply when navigating complexity. They are Openness, Situational Aware-ness, and Respect for the Restraint/Action Paradox.
“Openness can be described as a willingness to accept, engage with, and internalise the different perspectives, even paradigms, to be encountered when dealing with diverse participants in an interdisciplinary situation. It requires conscious acceptance that notions such as ambiguity, unpredictability, serendipity, and paradox will compete strongly, and legitimately, with knowledge, science, and fact. In essence, it means that while navigating challenges of a complex system, one holds one’s own strong opinions lightly (Pfeffer and Sutton 2006) and engages as both facilitator and learner.”

Some of the specific habits of mind that promote patterns of openness include:

- Hold your strong opinions lightly and encourage others to do the same.
- Embrace emergence: Be prepared for the intervention of surprise, serendipity, and epiphany.
- Cultivate curiosity — learn to ‘stay in inquiry’ and be curious (vs assuming, judging and jumping to conclusions).
- Value diversity: Encounte every person with equal respect, listen for and acknowledge their specific needs, knowledge, and ways of knowing.
- Set direction, but be open to not having specific goals or outcomes in mind.
- Be open to both/and options.
- Expect ambiguity or paradox: Accepting these as legitimate can often avoid unnecessary conflict.
- Accept that consensus is often impossible in complexity, adopt an experimental approach rather than forcing agreement to a single approach.
- Accept everyone as co-learners, not experts or competitors.

Habits of mind that promote patterns of situational awareness include:

- Consider the importance of relationships and interactions between entities and not just the entities themselves.
- Be aware of contingencies, scale, and history.
- Surface organising principles and values that will bound decision situations and help keep decision making consistent from one context to the next (vs setting rigid rules).
- Reflect often: formally, informally, individually, and collectively.
- Cultivate diverse feedback mechanisms and networks — avoid echo chambers
3. A Healthy Respect for the Restraint/Action Paradox

“Leadership and decision making in a complex system constitute a balance between the risks associated with practicing restraint and taking action. On the one hand, if the context requires it, one needs to consciously practice restraint and create space that allows the emergence of ideas, trust, opportunity, and even epiphany to loosen the tangled problem knot. There is a strong need for a certain slowness (Cilliers 2006) in taking time to allow emergence to unfold. On the other hand, one needs the courage to take action in a mist of uncertainty because, in a complex system, the consequences of our actions are never entirely predictable, and no matter how good our knowledge, there is never an objective “right” decision. Being conscious of, and comfortable with, this paradox is critical to successfully fostering and practicing adaptive leadership.” - Rogers et al

**Habits of mind that promote patterns of a healthy respect for the restraint/action paradox include:**

**Decisiveness/Willingness to Act Under Tension**
- Encourage courage. Cultivate an awareness of the natural inclination to avoid discomfort and have the courage to push beyond it and seize the “just do it” moment.
- Embrace provisionality: When a decision has to be made in the apparent absence of the necessary information, accept that it is likely to be imperfect and that it will be provisional at best.
- Do not be afraid of intelligent mistakes. Mistakes lead to learning.
- Avoid paralysis from the natural anxiety response to uncertainty. Accept that there is no one right place to start or end. Take the next fit-for-context action that makes sense in the here and now.
- Act small and local. Avoid large, system-wide interventions. One certainty in complexity is that any action can (and often does) lead to unintended consequences.

**Restraint Under Tension**
- Embrace liminality and avoid premature convergence — avoid being too quick to make judgments and choices.
- Avoid overconfidence about being ready to take action in a data-driven “predict and act” mode.
- Allow the “seeds of action” that you’ve sown time to germinate. Resist impatience and the need for an instant response.

These three frames of mind are interdependent, with openness as the most critical as it can enable or constrain the others. To some extent, adequate situational awareness is not possible without openness to a diversity of perspectives. In a complex system, one simply cannot afford a one-sided view. Knowing when to act and when to practice restraint depends on one’s awareness of changing dynamics in the system, but it also requires openness to the unexpected.

In Facilitation Settings:
- Discern when to trust the facilitation process and stand back quietly, giving the group dynamic space and allowing emergence.
- Keep options on the table long past their apparent usefulness. Many will find context later in the process.
- Know when to rest. Open and participatory engagement exposes vulnerabilities, requires humility, and takes energy.
- Besides these, there are many other habits of mind that are useful when dealing with complexity. I’m reminded for example of Jennifer Garvey-Berger’s “simple habits for complex times” which are:
  - Ask different questions
  - Take multiple perspectives
  - See the system

What habits or heuristics do you use when you encounter complexity? Let’s co-create a more comprehensive list together.

References


Flow

‘Flow’ was established as a concept related to job satisfaction by Mihaly Csikszentmihalyi in his book of 1975. For the transformative educator, it also relates to the ability to combine and reconcile two apparently contradictory aspects of the work: the principle that the participant is the leader, and determines not only the pace but also the direction of her or his learning; and the opportunity for the facilitator to intervene in ways that ‘push’ the participant towards transformation.

A useful concept in this context is that of the ‘growing edge’.

We are most open to transformative change at ‘the growing edge of our comfort zone’. In the cosy centre there is no motivation to shift; and outside the zone it takes a lot of courage (or desperation) to look for transformative paths. The challenge for the facilitator is thus to ‘push’ the participant to her or his growing edge but no further.
Systemic Constellation Work in Organisations

Floor Martens, LLM & Nikolaus von Stillfried, PhD

Systemic Constellation Work applies to a wide variety of fields: especially psychotherapy and self-development (e.g. ‘family constellations’) and consulting for businesses and other organisations (e.g. ‘organisational constellations,’ ‘management constellations,’ ‘project constellations’). However, the method also applies to many other contexts (e.g. ‘nature constellations,’ ‘research constellations,’ ‘medical symptoms constellations’ etc.). Several scientific studies have empirically validated the usefulness of organisational constellations.

Common Ground

All forms of constellation work build on a technique that we could call “systemic representation.” In an organisational constellation workshop, the procedure will often look like this:

One person (the ‘case giver’) describes the issue he or she wants to address. Together with the facilitator, the case giver identifies the most important elements that compose the relevant system for this issue. These elements can be individuals and organisations, non-human life (e.g. animals, plants), objects (e.g. buildings, products) or abstract entities (e.g. feelings, goals).

Second, the case giver asks other workshop participants to represent one of these elements each. Representing an element means embodying it. The participants’ positioning in the room (which they may decide on themselves or be directed by others) reflects their embodiment of respective elements. In this way, structures, relationships and dynamics become visualized.

Accompanied by the facilitator, the representatives tune into a mindful perception of the situation, their intuitions and their bodily sensations and then express their observations and feelings. They can change position in the room when they feel the wish to do so. Step by step, the constellation shifts towards a more harmonious state. The participants who are not serving as representatives mindfully observe the process.

When the facilitator decides to end the constellation, the participants who were representatives step out of their roles.

Finally, a harvesting process can be facilitated where all participants can share their impressions of the constellation process, their insights and its implications for the real-life system.

Organisational constellations are a powerful tool to:

• Gain a deeper understanding of the stakeholders you are involved with.
• Resolve problems by identifying the underlying issues.
• Unleash creativity, get new ideas, see things from a fresh perspective.
• Implement fruitful and lasting organisational structures, cultures and goals.
• Sharpen your intuition and perception skills.

A particular benefit of constellation work is its time efficiency. Three hours are usually enough to gain in-depth insights into an issue and to develop possible strategies for a solution, including the identification of concrete next steps.
Experiencing the power of intuition can transform one’s worldview. An amazing and until now not fully understood phenomenon implemented in systemic constellations is “representative perception” or “somatic information”: even though the participants usually do not know the system or the element which they represent in real-life, they have quite specific intuitive perceptions and impulses which the case givers often identify as matching the real system closely.

Experiencing the effectiveness of problem solving that relies strongly on intuitive ways of knowing can be transformative. One gains trust in one’s intuition and the intuition of others and there is an increased interest in the ability to tune into deeper levels of consciousness. Experiencing a system through someone else’s eyes can transform one’s view of the system. To a representative, their perspective is not just abstract information but experienced reality. We often observe a significantly deepened understanding of different perspectives as well as increased empathy and appreciation for them including for those previously considered problematic.

Nothing motivates transformation like getting a taste of a possible great future. In transformative processes, one often has the frustrating feeling that we know what we want to leave behind but we do not know exactly where we want to go instead. Being able to experience a glimpse of what a system in a potential improved future state could look and feel like, can be very motivating and provide valuable orientation.

Since systemic constellations can be experienced by several people at the same time, they can even contribute to the emergence of coherent collective visions and goals.

The Transformative Edge

Floor: From discomfort to exploration

My first experience with constellation work made me feel very uncomfortable. It seemed as if I was asked to be part of a play. Unexpectedly my intuition and senses were very strong while participating in it. Normally, I let my head try to find answers to difficult questions. In stark opposition to this tendency, during the constellation, I received much deeper insights through the embodiment of an element. This experience triggered my curiosity. A few years later I did a training in Business Constellations and Social Presencing Theatre. Nowadays I use constellation practices personally and professionally.

I still find it hard to explain to people, in words, what constellation work is. The best way to understand this method is by experiencing it. If you want to get to the essence of a problem and have, like me, little patience and you are open for something new then a constellation could be the answer. For me, what makes this method unique is that in a short time-frame it gives clarity on the essence of a problem. Oftentimes, it shows us what we cannot or do not want to see or acknowledge. A constellation makes the essence visible and tangible.

Nikolaus: From energy-depletion to energy force

I first got to know this method in family constellations and was blown away by how effective it was. The most amazing effect for me has been the ability to come to a much better understanding of why people act in a certain way in certain situations. This naturally makes empathy and forgiveness much easier.

I decided trained in this method and have been offering organisational constellations for a few years. I keep being amazed at how easily big shifts in perception can occur through this.
I remember a constellation that was looking at the role of so-called real-world labs in the transformation toward sustainability. One person who had a leading role in the real-world lab movement told me about his frustration around mainstream scientists who don’t take this work seriously because they see it as too involved with transformation activism instead of scientifically neutral. After taking part in the constellation as a representative for science, he said that he suddenly understood and truly appreciated the importance of this conservative and sceptical stance of mainstream science. Most significantly, he now experienced the described tension no longer as an energy-depleting conflict between opposites but rather as an energy-creating force-field between complementary poles.

References

Empowering Facilitation and Coaching

Marilyn Mehlmann

Underlying this project as well as the whole idea of Transformative Learning are a number of assumptions. For instance:

- More self-knowledge is a good thing, both in individuals and communities.
- Empowerment, which includes expanded action capability, is a good thing.
- Empowered people can co-create their own lives, to the benefit of all.
- Educators long to see more transformative effects in their students/participants, and believe the participants to be capable of more.

If we align with these assumptions, what general conclusions can we draw about the role of a facilitator, or a coach - given the Competences framework?

The Unspoken Agenda

An empowering coach sometimes claims to have 'no agenda,' but in fact we do: we wish to invite those we coach to become increasingly empowered. This wish comes from a shared value that says: more empowerment is good for both the individual and the collective. So our agenda is value-driven rather than either process-driven or content-driven. However, the key word is invitation: if the person or group says no, that is no reflection on either them or the coach!

Facilitation – usually taken to mean leadership of a specific, interactive group process – tends to be process-driven. Usually the facilitator follows or builds on a method, for example Open Space Technology or Learning for Change. Often the facilitator has been trained to ‘deliver’ the process in question. Her/his agenda is to support a group of participants to make the best use of the process and its tools, each in pursuit of their own particular agenda.

"There is a very thin line between a facilitator and a space invader"

AN OPEN SPACE FACILITATOR

Empowerment Entrain Change

A person or group signing up for a ‘transformative learning’ experience is implicitly saying: “I’m not satisfied with the way things are. Help me bring about change.” It can be about improving something that is already good; or about removing obstacles, or gaining new perspectives, formulating new visions. But change is the key, whether transformative or more mundane.

And with empowering facilitation and coaching, the change is defined by the participant. The role of the professional is to act as midwife to the desired change. Working at the transformative edge, we do our best to sense when the participant is ready to step beyond marginal change and into transformative change (Competence 5).
What is Change and how does it Happen?

Even consciously chosen change may be marginal in the sense that it may be reversed, either deliberately or unconsciously. In practical terms this is a virtue: we can try out different behaviours without first making a life-changing commitment. On the other hand, transformative change is often an outcome of shifting and broadening perspective: I see and understand what I could not apprehend previously. This is irreversible in the sense that I cannot now un-see what I have seen.

Expressed another way (Watzlawick, Weakland and Fisch), change that takes place within a system is always in a sense ‘no change’. In order to change a system, it’s necessary to be able to place yourself outside it. This is one way of defining a transformative change.

No matter the degree, change – say many oracles – is not really something you plan, it’s something that happens when conditions are right.

Warren Ziegler said that change tends to happen when we have a reasonable balance between hope and dissatisfaction. No hope – no reason to think about change; no dissatisfaction – no need to think about change. In some cultures and with some individuals, one or the other is conspicuously lacking. The empowering facilitator can help participants explore and clarify both their hopes and their dissatisfaction, paving the way for smaller or greater changes.

Warren Ziegler identified nine different personal styles that he called Spiritual Archetypes. Identifying your own principal archetype(s) can help you to hone your own style, to bring out and shine up the facets of yourself that contribute to your skill. It can also help you see others, including your participants, in a new light.

Ken Wilber talks about different ‘lines of development’ in which each individual displays personal strengths and weaknesses, and points out the parallel to the different ‘intelligences’ identified by Howard Gardner.

For you as a professional, the most important learning from all these typologies is that people are different! Facilitators are different from each other, and their participants are different. Any attempt to impose our own way of seeing the world on another person is not only aggressive, but also likely to fail.
The role of an empowerment professional is to help people to:
- Understand the context for their actions
- Focus on what is or might be possible: solutions rather than problems
- Define their own goals, explore what is possible, find opportunities
- Formulate their intention to change – and the help they need to support their commitment
- See the results of changes they make

As a professional, you need to be engaged in your own journey of self-empowerment. This is how you understand the needs of others.

Your first task with a person or group is to build and maintain a safe space in which the person or people you are coaching feel able to ask for and give mutual support. Your major tools are:
- Trust in the wisdom of the process
- Ability to build ‘rapport’ (see below)
- Ability to ‘park’ your own concerns and beliefs, particularly your judgements
- A willingness and ability to respectfully interrupt aggression or negative criticism, and turn the energy behind it to constructive use

The second task concerns how you listen, and how you respond to what you hear:
- Listen attentively and with respect – see Deep Listening
- Let the speaker see that you hear and understand them
- If it seems they are stuck in a problem, don’t try to solve it! – ask whether they in fact see any possibility for action
- If appropriate, recall for them the power of their own hopes, vision, positive experiences

To do this successfully, you need to be on the alert for your own problems and fears. Recognizing them can help you to empathize with the other, not recognizing them can interfere with your communication.

The third task is connected with how you speak: with your own willingness to hold a solution focus and to speak from the heart.
- Ask questions!
- “Be yourself”. Acknowledge your emotional responses to what happens, and practice ‘parking’ those responses: stay with the process.
- When you need to bring up a tricky question: take a deep breath and say what you’re feeling. Use “I” and “me” statements – not “you”.
- And remember to keep returning to a focus on solutions – not problems.

The fourth element is the insight that all of this is much easier to say than to do. Give yourself a pat on the back when it goes well, but without blaming yourself when you realize it didn’t go so well. More important is the ability to notice whether you’re doing well or not, and thus to learn from your own experience.

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Peer-to-Peer Coaching

Marilyn Mehlmann with Andre Benaim

Everyone benefits from having a personal coach: someone to turn to, to try out ideas, vent problems, and get feedback. Few of us can afford to have a professional coach regularly at hand, but we can all become skilled at and benefit from mutual peer-to-peer coaching.

Peer-to-peer coaching can be done in pairs, and can be even more effective in groups of three: one person presents his or her case, one takes the role of coach, the third takes the role of observer. Often those who listen benefit at least as much as the speaker!

Asking for and Receiving Feedback

1. Prepare

The first key to receiving good feedback, or coaching/mentoring, is good preparation. The clearer you can state your case and your concern, the more likely you are to receive useful feedback.

- Define your actual concern: not ‘the whole project’, but one particular aspect of it that you personally find problematic or challenging
- Formulate 1-3 things you would like to improve
- Ask yourself whether there is anything about the problematical situation that you DON’T want to change – that you find really positive

2. Before the Session

Think about your ambition or objective for the session. What is the best you might achieve? Perhaps you can also identify an acceptable minimum?

Put yourself in the right frame of mind. The other person or people are there to support you. Be ready to make the most of the time they are giving you. Think in advance about how you will take notes, and what you will do to follow up.

3. Listen!

A feedback session is not a conversation. It is a focused dialogue, with one person at a time speaking and the other(s) listening.

When you are the one receiving feedback, you have the principal responsibility to direct the dialogue – that is, to say what you want (and need) to say as briefly and precisely as possible. When the other(s) speak, you need to listen carefully, e.g. by Deep Listening (see chapter on Deep Listening). You do not respond unless there seems to be a misunderstanding, and above all: there is no need to argue or defend yourself. Listening is the key.

Take notes – or, even better, ask one of your respondents to take notes for you.

4. Thank!

At the end of the session, remember to thank your respondents! They are there to support you to see your own way more clearly.
Giving Feedback

Remember, also, to speak from your own perspective. For instance, “I’m having difficulty reconciling what you say about xxx with what you say about yyy – can you explain?” is more helpful than “You’re contradicting yourself, it doesn’t make sense!”

Good questions further into the dialogue can be:
- What first steps can you take?
- What resources will you need to continue? (material, legitimacy, moral support…)
- Specific intention: when and how will you do it?

Some other tips when giving feedback

1. Prepare: put yourself in a frame of mind where you are committed to supporting the speaker to reach her or his own objectives.
2. Create a safe space. If you can influence the physical space, make sure everyone sits on the same level and that you are close enough to each other not to need to raise your voices. Ensure there is adequate privacy, and do your best to prevent phone calls and other interruptions.
3. Don’t take away the problem! Empathy is good, when it means you ‘get under the skin’ of the speaker and begin to experience how they feel. But always remember that the problem is not yours, either to have or to solve. At best you can ask questions and make suggestions.

4. Look beyond the presenting problem. The presenting problem is real, at least to the speaker, and needs to be taken seriously. And, it’s important not to stop there but to look for what could lie beneath or beyond it.

5. Question your own motives. It’s easy to ask questions or make suggestions that are not really what the speaker needs. Maybe they make us feel safer, or more clever, without supporting the speaker.

6. Be kind to yourself. No-one is the perfect coach, and those being coached are usually quite capable of ‘defending’ themselves from us if we are clumsy. The important thing is to notice our deficiencies. And to give ourselves a pat on the back when we notice them, because it means we are learning something.

Observing

Listen and watch for the communication between the case-owner and the coach. You are observing, not judging: what do you hear, what do you see? For instance, is the case-owner able to present the situation briefly and clearly? Does the coach jump in with ‘solutions’, or really take the time to listen? Notice your own frustrations, when you would like to break your silence and jump in. Is it your ego speaking, or is the conversation getting off track?

Be prepared to summarize your observations at the end of the coaching session, if the others want to hear them.

Experience

These guidelines emerged as a result of many frustrations. Partly, I was training (professional) coaches, for whom these guidelines are also applicable. But more importantly we were running workshops with real-life case studies: each participant brings an actual question or challenge, and we wanted everyone to receive personal deep feedback. Clearly, as in real life, there were not enough professional coaches to go round! These guidelines arose out of those situations, and comparable situations in our leadership training programmes.

And suddenly, it happened. We began giving a brief introduction to the principles in an evening session, and the following morning invited participants to form small groups for case work. Each and every participant received a full half-hour. And I never heard one who was not grateful. Such a relief. It also made it easy for me, as facilitator, to move from group to group, observe (yes we im-
6. Pedagogy
Forest Bathing

Zsuzsa Vastag

Forest bathing is a term that emerged in Japan in the 1980s. It describes the practice of being in the forest, taking in the forest atmosphere - not hiking, not jogging, just spending time in the forest in a mindful way, consciously connecting with the surroundings using sight, hearing, taste, smell, touch. Using all the senses helps us connect to the natural world.

Connection to the natural world is something that is becoming a rarity for a large part of humanity. According to the United Nations’ World Urbanization Prospects from 2018, 55% of the world’s population live in urban areas, and this proportion is expected to increase to 68% by 2050. The number of people living in cities in Europe is higher than average, 74%. While definitions of nature vary (some conceptualize nature as everything that is non-human, while others see it as the phenomena of the physical world which also includes the human body for instance) one thing is clear: cities offer a completely different living environment compared to the ones humans evolved in. While there are benefits to it (like easy access to health care, food, shelter, etc.), it is also associated with a higher rate of mental problems, including depression or stress-related issues. While the reasons for this association are numerous, research suggests that one important factor is the lack of nature within the city: the dominance of the grey colour of concrete, the constant noise, the presence of car fumes, light pollution, a myriad of sensations bombarding us all the time, and so on.

So we are intuitively looking for ways to rebuild the connection to the calm of nature by having plants inside, by going to the park for a picnic, by having dogs and cats around us or by hiking in the nearby forests. The practice of forest bathing is basically a conscious effort to actively seek out nature and enjoy its soothing, healing effect on our body and mind. A study in 2009 found that exposure to phytoncide (the “aroma of the forest”) contributed to a significant increase in human Natural Killer T-cells, a type of white blood cells needed for a well-functioning immune system, as well as a decrease in anxiety, depression, anger and fatigue. Even a small amount of time spent in nature can have a positive impact on our health.

Forest bathing is a rather simple method - you need an environment that has trees (preferably a forest) and you need yourself. The point is to be in the present moment and be mindful of the environment around you, through all your senses.

You can go forest bathing by yourself but if it makes you feel more comfortable you can join groups and/or have a guide. It is advised to go when the weather is moderate, to avoid stress that might be caused by adverse conditions, and to dress comfortably. Also, leave your electronics behind so they won't distract you. Look for a space where you feel relaxed and calm. Walk slowly and listen to your breathing. It doesn’t matter where you go or if you go anywhere at all. Engage all your senses. Listen to the birds singing, to the small animals moving around in the leaves, to the breeze blowing in the branches. Smell the aromas of the forest, the trees, the soil.

How to go Forest Bathing

See the colours around you, the sun shining through, the dark spots on the ground. Touch the leaves, the ground, the stones, the bark. Drink from a stream, taste the berries. Lie on the ground, be still.

There is no one best way for forest bathing, it differs from person to person. The important thing is that you feel comfortable and so can slow down and relax. This way your connection to yourself and to your surroundings can be strong and powerful.
Forest bathing offers a direct as opposed to symbolic experience. Many of us spend a great amount of time in our everyday life in the symbolic arena, at work, in front of the computer, we debate, we discuss, we learn, we watch. We use our bodies to bring our head from point A to point B. We rarely stop and look around.

Mindfulness emphasizes the importance of bringing your attention to the present moment without judgment. Forest bathing combines the practice of mindfulness with the soothing effect of nature. It gives us an opportunity to be connected directly to our own bodies and to the surroundings around us. When we are able to take what is there without judgment or interpretation, then we can experience the world from a different perspective.

I was born and grew up in Budapest, the capital of Hungary, so I am clearly based in the city. But we went hiking quite often and also we had a little garden just outside of Budapest, where I helped my grandmother in cultivating tomatoes, weeding the grapes or watering the cucumbers. As I grew up I spent less and less time in nature; time with friends in the city became more important.

After high school I took part in the European Voluntary Service and spent one year in Finland, at a farm, 9 km away from a village with shops and bus stops, surrounded by pine forests. I found it to be a blessing, as I found again the connection to nature by being out in the forest almost everyday. It felt like taking a deep breath and finally letting go of a great deal of uncertainties and worries, finding a spot of calm within that I can still find in otherwise stressful situations.

When later I was an assistant trainer for a youth group preparing to take part in the EVS programme, we incorporated a session in the woods. Some participants didn’t like the idea of “hiking” which brought unpleasant memories, but we encouraged them to think of it as a walking meditation that happens to be in the forest, and in the end the feedback was overwhelmingly positive as they all felt much more relaxed. As a trainer, nonetheless it is important to respect your participants - no one should be forced to be in the forest, as calming down can only happen if the forest bathing is voluntary.

### References


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**Transformative Edge**

**Finding a Calm Centre**

Photo by Liam Charmer on Unsplash
Applied Improvisation

Christian F. Freisleben

Applied Improvisation is the application of improvisational methods in various fields like consulting, facilitating (workshops, team trainings, meetings, conferences...), teaching, coaching, researching, generating or evolving ideas and designs, theatrical training and playing, medical and therapeutic settings or in social work.

What Makes a Method an Improvisation Method?

An improvisation method is a well-structured process or defined game that intentionally challenges the players to leave their habitual structures and allow themselves to act within another set of rules, with the purpose of igniting creativity, impulsiveness and intuition.

Association Methods with Words

The most basic approach is to play word-pong. A says a word, B says a word as a spontaneous association and so on, as fast as possible. It is possible to apply this method in groups with up to 15 people. This can be an approach to brainstorming as well as a creative way to collaboratively (re)search for patterns in different topics or in any story (of course stories of projects, ideas, learning concepts... as well). It is also a way to follow and to practise the “rules” of applied improvisation (see below).

Another method is the word-by-word or sentence-by-sentence method. In pairs, trios or small groups each person says one word or (one part) of a sentence – thus whole sentences emerge. In that way it’s possible to e.g. summarize lessons learned, to bring structure to texts and ideas, to find innovative solutions for complex problems... For these methods there are a lot of variations.

Association Methods with Sounds or Songs

Every word or sentence can be complemented or replaced by a sound. This helps to move on even faster with ideas, emotions, new approaches to clichés and prejudices... Singing along an improvised piece of music is also very liberating, energising and a boost for self-reliance.

Association Methods with Mimes and/or Gestures

Words, sounds, and songs gain another fascinating layer. Mime and gesture are also powerful ways to think, collaborate, and evolve on their own. For instance, it is possible to visualize mathematical concepts, statistics, and the content of written research – this is helpful for a very intense form of deeper learning and understanding. At the same time it is a way to apply knowledge, and to find innovative variations and completely new concepts. One powerful implementation of these principles is the method of walking through rooms together in very different ways that enables new ways of learning, thinking and co-creating.

Association Methods with Visualisations

Instead of or supplemental to words, sound, movement, it is possible to use very basic ways of drawing.

Examples of Methods and Approaches

Association Methods with Words

Association Methods with Sounds or Songs

Association Methods with Mimes and/or Gestures

Association Methods with Visualisations

Content: Sylvaine Messica; Adopted from a Visual Facilitation of Philippe-Elie Kassabi
There are many collections of descriptions of variations of these methods and formats. Applied Improvisation needs very simple games and methods to get to know each other. It needs, in a manifold and creative way, approaches of reflecting / debriefing of what has just happened in working and playing together, and how these experiences can be transferred to all fields of work / private life / society.

Rules of Applied Improvisation

Applied Improvisation builds upon rules. Some of them are:

- **“Trust, embrace your first idea”** - often people think for a long time, hesitate and question themselves. Improvisation helps to trust one’s intuition.
- **“You can’t do or say anything ‘wrong’”** - an important affirmation.
- **“Start where it’s easiest”, even if it seems unspectacular at first sight, it is important to get started.**
- **“Let your partner shine, support each other”,**
- **“Use the concept of ‘Yes, and..’ – build upon ideas and impulses of other people in your (learning) spaces!”**

Applied improvisation supports and brings an intense way of enacting collaboration and participation. In an emergent way, transformation is not only ‘happening’, it is co-created by everyone present. Everyone gets a voice and even things and concepts get a voice, a body, and a story of past, present and future lives. Structures of communication are uncovered, hidden agendas, incidents of power and powerlessness, of support and repression. It is far more than looking at past events, behaviours and attitudes – it is transforming them. Not because someone is telling you to put this in action, but because of things which you discover and develop alone and together.

Transformation is Co-created

Most of these methods and approaches can also be applied in online settings.

A vibrant facilitation experience

I have been using Applied Improvisation for more than 25 years. It is fascinating to see people overcome personal fears and to (re)discover strengths, ideas and steps to do so. It is a vibrant experience to co-create this process as facilitator and at the same time have many possibilities to bring in one’s own knowledge and impulses.

Start improvising yourself! Take a sheet of paper, set a clock for three minutes and write down as many words as you can. After that start looking for patterns, for words that surprise you, and combine words like you have never combined them before. And of course you can perform this act of bricolage together with other people!

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https://improwiki.com/en - games, exercises and warm ups
https://spolingamesonline.org/ – games and exercises of Viola Spolin (social worker, teacher, facilitator), also as videos
Gamification
Designing Memorable Experiences through Personal Motivation

Wilmer Meneses Morales

Humanity has probably always used games with goals beyond simple fun. For example, in the beginning, games such as hide and seek were used to train physical skills. In times of war, games like chess have been used to train the mind in the design of military strategies. In modern times, simulators can teach us to fly a plane or practice surgery.

Modern game research identifies different player profiles, each with their own set of intrinsic motivations. Initially, this research was used to develop marketing and customer loyalty strategies, offering points and stamps that can be exchanged for gifts. By deepening the complexity of a gamified system, applications have been found in several areas, such as in human resources, to attract and maintain human talent, and in the educational field to awaken the interest of students.

Game design is focused on attracting and keeping the player immersed in the activities and challenges that the game poses. Rather than a methodology, gamification is a strategy, which consists of bringing elements inherent in game design to fields other than entertainment. In the educational field, it is a matter of triggering psychological factors linked to motivation to attract and keep the participant immersed in the activities and challenges that the facilitator poses.

However, gamification must be differentiated from “Serious Games” and Game Based Learning (GBL) in which a previously designed game becomes a training tool that can be used as a skill enhancer, while facilitating the understanding of theoretical concepts in a simulated and safe environment. In other words, it is not about turning the classroom into a recreational space.

Instead, it is about making the whole learning process meaningful, so that a participant who wants to learn and develop a deep comprehension of concepts and their application in the real world is enabled to unlock new levels of knowledge.

Although there is no certain science or standard model that suits all cases, there are tools that allow for the creation of gamified experiences according to the needs and context of a given situation. To design our “game”, we can start from Kevin Werbach’s 6D model mixed with the phases of Design Thinking to get a framework like this:

To Facilitate the Process we can use Tools such as these:

• Bartle’s taxonomy will help us understand the types of players and the dynamics that best suit each of them.
• The Octalysis, developed by Yu Kai Chou as a measuring tool, can be applied in Define, Test and Implement phases.
• The SMART method offers us a pattern of objective formulation that maximizes the chance of success.

• The Reiss motivators and Amy Jo Kim’s social engagement verbs can be present both in the empathy phase and the ideation and prototyping phases. Boost them with Andrzej Marczewski’s RAMP metric to constantly evaluate and test them.

• For the Prototype and Implement phases it can be very useful to have on hand Jesse Schell’s AGD Deck of Lenses (Art of Game Design).

• To visualize and control the entire process, the Gamification Model Canvas could be a good choice.

• And many others…
An Adventure

Five years ago, all this was totally unknown to me, until the moment I started a training process based on the Design Thinking methodology that allowed me to work with interesting people from different contexts. Among my new adventure companions, a mentor was included, who without directly intervening gave us the guidelines for interaction with this new world while teaching us the theories, strategies and methodologies that would be useful for us to move forward. Thus, without my being aware of it, began my first approach to gamification.

We were ten people with the idea of creating a project that would somehow improve people’s lives. How were we going to do it? We had no idea, in fact, we knew very little about ourselves. Therefore, the first phase was quite introspective, in a playful way we shared internal reflections that ended up making visible the fears and super powers of the team that was being created; in this way it was easier for us to assume roles and tasks in the following phases. Now that we knew each other a little more and with some tools on hand, we started to get into this world of order, chaos and ambiguity.

The interactions led us to inquire about current social “diseases” such as stress, depression and the possibility of using playful games to fight them. At that time, we began having conversations about something called gamification and curiosity led us to deepen it. ‘This is how we arrived at our first prototype; we devised a way to gamify emotions, we created a fun “medicine” that offers micro moments of play; we took simple and doable game challenges and put them in writing on small strips of paper that we then rolled up and put in empty and colourful capsules, such as are used for medicines. We named it Juegacetamol, a play on words between Juega, ‘play’ in Spanish, and paracetamol, the name of the medicine.

The true gamification experience was not what we designed, but how we did it. Let’s reread the story, but this time analysing the similarities with some inherent elements of the game.

Let’s start with the main goal: In addition to learning, ours was to create a project in an environment that was not usual. We, the characters, with different motivations and skills, learning with some autonomy to use the items offered by the mentor in his role as Game Master, were assuming and solving challenges and earning experience points with the mastery of each of them to have greater responsiveness when facing the big boss, the market.

For a different example of game-based learning and the complexity of designing it, see the youtube video on The World Peace Game. This is a clear example of how a gamified learning experience allows the awakening of the players’ awareness as to how they perceive and interpret their experiences and interactions in other contexts than they usually move.

“A game is a problem-solving activity, approached with a playful attitude” - Jesse Schell

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D. YOUR OWN EVENT

You may already have a great “transformative edge” and would love to sharpen it further, or maybe you have just embarked on an exploration of “transformative edge” in adult education? Amazing! The world needs more practitioners like you. We believe this can be a very good way to teach for the future.

People living in this time need to embrace constant change and erratic transformations. Being facilitators of those processes means learning alongside our participants, and taking the opportunity to equip all of us with insights, tools, feelings of confidence to live with awareness, intention and care.

Everything you will read in this chapter can be applied to any subject. Sometimes it may be a bit hard to envision but with some imagination and resourcefulness, it is possible. And whenever you hear a nagging voice in your head insisting: "This won’t work for me. I tried something similar and it didn’t work!" we invite you to flip it around and challenge yourself with ‘HOW can this apply to me? How can I PLAY with this?’

This section of the book is dedicated to helping you design, prepare, and deliver a facilitated process that will enhance the chance for transformation to happen. It will also help you become creative about how to nourish the transformation your participants will go through after you are long gone from their learning process.

How to Read this Section

The intention is to make it as practical as possible, providing inspiration, tips and resources, challenging assumptions and beliefs. We believe you already have a wealth of knowledge and experience and we invite you to embrace it.

Let’s start!
Imagine process design (workshop design, programme flow, curriculum design, etc) as a story. It has a context, a beginning, a middle and an end. And the way it's written or told is through a cohesive story that has a flow to it. It has ups and downs, parts that go faster and those slower ones to give rest to the mind, the heart or the body.

Consequently it’s necessary to pay attention not only to the design and execution of your story but also to think of and design the transitions between the parts of your programme. This will give the participants a feeling of cohesion which sets the stage for the much-needed trust to develop among facilitators, between facilitator and participants, and between participants.

A simple well thought through sentence, a well-timed break, or a statement from a participant used to link to the next part in your design can make a world of difference. These transitions between parts of your programme (different modules, like seminars or exercises) give you the opportunity to infuse the design with your own personality, to play and own the role of the facilitator as storyteller.

Another element that can help you design for transformation is to develop building blocks that are repeated throughout each part of the curriculum, like a rhythm in a song.

First, some context.

Can we agree that rhythm gives all a sense of groundedness? An impression of familiarity? A feeling of Yes, I can do this!? The same applies to all learning processes. If the participants know what to expect, they feel safer to explore, to play, to learn.

Repetition should not be taken to mean re-using your designs in the sense of simply duplicating them. That would probably not work for every class you will ever teach! And let’s face it - we facilitators are curious beings so it would become really boring with time.

Repetition in this sense means finding curriculum building blocks that will give it a rhythm.

An example might be where each module (aka chapter of your story) has:
- A title
- A bit of theory (or context needed to nest the story in real life)
- An action part
- Thorough and kind reflection
- Sharing participants’ insights and learnings with the group.

Another set of building blocks, this one from the Genuine Contact approach, would be:
- Landing (with transfer-in)
- Fears and Hopes (of the participants tied to the event)
- Outline of the day (aka Agenda)
- Facilitating learning of content (aka the Process: probably messy and fun)
- Closing, Evaluation, and Feedback (probably including a Transfer-out)

These building blocks arise with practice. If you take a step back from your own designs, you will probably start seeing a pattern: some things you always do to create trust in your guidance.

Let’s get practical!

Take a moment and write down the answers to these 2 questions.
1. What do you already do to make people feel safe in your programmes?
2. Can you distill any building blocks from your own experience? How do they help you create a safe atmosphere for transformation to happen?

More on this in the section: Prepare the space (see below)
A Facilitator may have many Roles

**PERSONAL STORY FROM A FORMER TEACHER**

“I am a teacher by profession. And yet when I shifted my career to being a facilitator, I found my education more of a limitation than a help. Yes, I knew how to design a pedagogically sturdy lesson. Yes, I knew how to include different learning types and assess the time needed for a certain activity. But where I found my pedagogical education limiting was in the mindset.

At the University, I was groomed to believe that I need to know best. Even if I knew in my bones this attitude was counterproductive to the empowerment of my students, I could not shed the feeling of obligation that I always needed to have the (right) answer. What a burden!

I could not distance myself from this belief until I was introduced to the work of Angeles Arrien, who offered a healthier perspective on the role of the teacher.”

Neža

This interpretation of ‘teacher’ can be liberating:
- Permission to not know it all, all the time. A sense of relaxation into guiding the process, instead of worrying about the accuracy of the content.
- The trust and the profound knowing that the people in front of me know everything they need to know already and that my role is merely to help them get that wisdom out in the open. Additionally, my role as a teacher is to help them own that wisdom and build upon it.
- Last but not least, it helps detach from what ‘should happen’ during a process.

This was the role of the teacher. A TL practitioner wears several hats. It’s helpful to be aware of them and be clear about your role. It makes it easier for your participants to appreciate the qualities of different roles you will bring to the table, and learn from you ‘by osmosis’. You may notice yourself switching between the roles of a teacher, trainer, facilitator, and maybe a role of your personal flavour.

Let’s get practical!

What is your personal flavour? How would you put it in a few words?

About that ‘personal flavour’ … Take my colleague Jasenka, who is also the motivator and the entertainer. That is her zing, her personality, the spirit she brings to the table. It is so much fun to be in a transformation process with her.

My own additional roles are those of a cheerleader, and the baby in awe. The cheerleader’s attitude is: ‘If you don’t believe you can do it, let me believe in you first. When you are able to do the same, you will take over the belief in your abilities.’

The baby in awe in me is the part that finds everything that is said or happens, and I mean everything, interesting. Someone starts shouting, crying or laughing, I find it intriguing. Generally, the participants catch the curiosity virus as well which helps them dare to step deeper into their own process.

Neža
Neutrality or Detachment as a Facilitator of TL

“We don't usually remember what people said or what they did – however we do remember how they made us feel.”

Maya Angelou

One of the transformative learning facilitator’s assumptions is that transformations, lived through with awareness and good will, could lead to more authenticity. Being authentic means being in contact with ourselves, our bodies and their sensations, emotions, thoughts, and being in loving relation with others, the earth, and the universe. Acting authentically means following our truths, believing our gut and speaking up freely. We certainly recognise the difference in other people between authentic acting and acting from a role.

We, as facilitators of transformative learning, take on different roles, since we are human beings and roles are our way to adjust to real life situations. And, there is a huge difference between unconsciously slipping into a role, and consciously choosing and acting in a certain role. The differences are in the field of freedom to choose, use and observe a role we take, a space between "me and my roles". Coming into a learning space prepared to play any necessary role to facilitate a process is one thing. Coming to act is totally different. It is so sad to see all the masks people carry around, without even being aware of them.

One reliable sign that we are detached and choosing is calmness, a state of observation and naming. We can even empathise. All the way, we are aware of other people’s and our own emotions, and still, we stay peaceful in our centre and act from it. If ever strong emotions override the peace, we have a routine to park them and deal with them later, to detach from them.

This detachment is crucial for allowing inspiration and insights to emerge, to see our filters and assumptions, to feel, sense and intuitively know, and to serve other people not travelling the same path.

Preparation

“Failing to prepare is preparing to fail.”

Benjamin Franklin

Every facilitator has their own process of preparing for an event. Here is one example with a holistic approach to designing an event. It is based on Genuine Contact, the Medicine Wheel Tool™. I use the tool regularly and at a certain point I figured out I am naturally using it to design processes as well. For more reading check the chapter on Genuine Contact in this book. This tool can be applied to almost any creative process; for example, in order to structure conversations with potential clients, for sales conversations, to design transformative learning curricula, workshops, events, emails and personal reflections.
Start with the WHY

Let’s get practical!

Start at the core, clearly stating the PURPOSE. The gist. The reason why this programme must exist. The Pole star that will give direction when you get lost in the labyrinth of your creative mind.

Purpose can be expressed on different levels.
- On a personal level: Why is this design important to me?
- On the level of the client/participant: Why is this programme offered to them?
- On a higher level: Why should this curriculum exist at all? What will it bring to the world?

You probably have your own preferred starting point. The basis is to have clarity on the purpose for the client or audience.

Step into your Leadership

After having clarified the purpose of your event, think and feel into the field of LEADERSHIP.

What leadership will this purpose require? Put differently: in order to bring this purpose to life,

- What values will you need to live fully as the one who will guide this process with this purpose?
- Which struggles will you need to overcome? (A prejudice? Unfamiliar jargon? Lack of time?)
- Which fears will you need to face? Think of your fears and those of your participants.

This is a preparatory reflection to take into account in the design. Leadership here is all about you standing firmly in yourself. The clearer you are about what inner work this event will require, the easier it will be to be neutral as a facilitator and relax into your own facilitation style.
Define your Vision

Following the Medicine Wheel Tool™, the next design field is the VISION. Here the key question is:

“If this is the purpose of the event, what is my vision for it? When will I know that the purpose really was achieved? What proof will I need for my brain to know that I did well?”

The simplest way to design a very practical vision is to make three lists:

• What should the participants have in their hands at the end of the event?
  • Make a list of: handouts, notes, pictures, emails, resource lists etc.

• What do you want the participants to have in their heads after the event?
  • Make a list of ideas, mindsets, attitudes, pieces of knowledge, questions etc.

• What do you want the participants to have in their hearts as they walk away from the event?
  • Make a list of emotions you’d like them to experience.

Please note that we haven’t mentioned one single method or exercise thus far. The place for that will come in ‘management’.

Get to Know your People

Next is the field of COMMUNITY. Think participants – but not only. List everybody who needs to be involved for this purpose to be achieved.

First, think of the context of the event.

• Will it happen within an organisation? If yes, what is the culture in this organisation? What rules apply and who stands behind these rules?
• If it will happen outside an organisation, you can reflect on the context of the time, a political situation, a cultural situation, or a theme that serves as the context within which your event will be nested.

• What is your experience level in the kind of event you were asked to deliver? Do you need a mentor or not?
• Who do you need to get on board with the idea of this event so it will have a lasting effect in the organisation?

Next, the people who will sit (or dance, write, sing) with you in the circle.

• What do you know about the participants?
• What do you still need to know about them?
• How many will come to the event?
• What kind of learning processes are they used to?

Clarity on the context and profile of the people will help you get a better understanding of the community you want and need to attract.
Let’s get practical!

Based on your reflections on the context and the people, briefly answer the following questions:

- Who needs to be involved for this to succeed?
  - Think: mentors, coaches, interns, friends, your family, etc.

- Who are the stakeholders?
  - Think: client, layers of organisation that have influence on the decision making, boards, students, participants etc.

- Who can help from inside/ outside? Who can be asked for support?
  - Think: mentors, coaches, friends with knowledge in specific areas, retired neighbours could help with hosting, etc.

- Who/what kind of people are coming?
  - The way they like to learn, the way they expect to have knowledge delivered (so you can then gently surprise them), etc.

**Number of Participants**

Group size and envisioned process are interdependent. Before the final decision of group size, try to envision group interaction and effects on long-lasting relationships between participants. Of course, if that is your intention.

Can you recall the biggest conference you ever attended? Did you manage to start a new relationship there which lasts years after? In principle, more people means a stronger collective field, and less opportunity to create long lasting relationships between individuals.

And, as Marilyn, the editor of the book and role model for many of us, says: “In my experience this is more related to the number of facilitators. With 10 co-facilitators I can happily handle 70+ participants AND see long-lasting relationships develop. This presupposes a design making full use of the co-facilitators, of course.”

Well, we will not go deeper into co-facilitation in this version of the book, but certainly we invite you to explore this bravely.

As a telecommunication engineer, I see networks everywhere. There is a formula. If there is N nodes in a network, number of connections is:

\[ C = N(N-1)/2 \]

Translated into facilitation context, if you have 10 people in a group, there is 10*(10-1)/2=45 relations. 15 people create 15*(15-1)/2=105 relations.

The consequences for facilitators are tremendous, since they manage relationships, not individuals.
Yes, this is finally the HOW. The part where you translate whatever you wrote in the VISION part into an actual exercise, a tool or piece of theory that will contribute to that desired outcome. Your guiding principle is the purpose, and your gentle reminders are the possible obstacles you defined in the leadership section.

Once you have compiled a set of exercises that might fit the bill, start arranging them in a time-line. When you have come to this point, you have applied a whole cycle of the Medicine Wheel Tool™. You can now go back to the Purpose and check that your design is still aligned with the purpose.

At a five-day retreat for a senior management team of 13 people, we invited them to paint. My co-facilitator was in charge. She covered a long table with paper, supplied paints and brushes, and put on a Mozart recording. Instructions: think of the future of your company; paint anywhere you want, anywhere you want (even on top of or linking with other people’s work); do it in SILENCE.

The team was sceptical but willing to try. After a tentative start the painting took off, and soon covered the entire 3-4 metres-long paper. The response was astonishing. First they mounted the painting on a wall and had themselves photographed in front of it; they were visibly moved by the experience, to the point of tears.

We went on to use the painting in various ways throughout the rest of the retreat. Many years later, I still have a piece they cut out and framed for me.

Marilyn Mehlmann

If you want to go further, scan through your design several times, each time with a different filter in mind.

The 'Why' Filter will help you discern the exercises that really serve the purpose rather than those included simply because you like them or had a blast experiencing them yourself. If you rigorously ask yourself ‘Why do I want to include this?’ you will most probably spot the intruders.

The 'Time' Filter is when you do your best to estimate the amount of time needed for each part of the programme, given the size of the group. The principle of ‘less is more’ applies here. It is often more effective to have fewer exercises or tools in a programme and rather create time and space for the participants to go deeper in their exploration. Additionally, pay attention to how you will move from one part to another. Remember: designing a programme is like writing a story.

The Different 'Learning Styles' Filter ensures you cater for all types of learners. Providing learning media for visual, kinesthetic, logical, social, auditory-musical, verbal, or solitary learning types will enhance the chance for all the participants to learn what their body and soul is ready to learn.

The 'Forms and Formats' Filter will bring dynamics to your process. It’s easy to get stuck in one form - lecture format, for instance, or plenary circles. Have you included different formats of listening and dialogue like dyads and triads?

I dare you to include art creation, poetry writing, doing or listening to music, and dance into your processes. As spices make our dishes into an enjoyable and unforgettable experience, art will do the same for your event.
As a good host, you might consider take-aways for your guests. In this context, they are usually in the form of materials and handouts.

In the design section, we spoke about the vision of our event, and what we want our participants to have in their hands, hearts and minds at the end of the event. Materials and handouts are not only for hands! Certainly, protocols and templates are very handy and convenient gifts for our participants. They can easily adopt them, customise and employ them skilfully, since they are trained to use them.

My most generous teacher in respect of handouts, Walt Hopkins, gives his participants an abundance of stationery and materials, which he calls free gifts. Moleskine notebook, scented pen, small 30 page booklets (Walt’s favourite passport format), nicely designed questionnaires and templates in A5 folders... The whole box of things is carried away by every participant from each of his workshops.

I have a few of them, and I cherish them for their beauty, Walt’s wisdom formatted in carefully designed documents, and a map of territory I discovered with Walt’s help.

His style, though, is not my style. I love to write love letters to my participants, after our learning events, remembering all important points we discovered and discussed. Then I attach all important materials that I use or mention to them. With the design of my artist friend Mare, those letters are not only useful, but even more a manifestation of my appreciation for their trust and the time we spent together.

And then, sometimes, they return a love letter to me...

JASENKA

Sometimes, all those gifts are just inspirational or informative, as reading materials. Then, they are for our mind.

Consider also the timing of when you give out the handouts. Sometimes we want full participation, and our participants do not have time to make any notes during exercises. Then, they need extra time to make notes. But it is meaningless for them to write down the protocol of the exercise. You can provide a more accurate one at the end of the session; or in the beginning, if the participants work on their own. What they need, however, is time to reflect and connect learnings with their practice. For that, you can ask them to bring their own notebooks and colour pencils, or that also can be your “free gift” to participants.

It is important to provide all necessary materials in the training room. It is up to your style, the size of the group, and the room setting, whether all materials are distributed at the beginning of a session, or each participant takes what he or she needs during the session; or receives it afterwards. However, it is part of physical preparation to ensure that you put everything they need at their disposal and make clear how to freely use materials.

Main lesson: prepare all materials and handouts carefully, and use them in a way which doesn’t distract, but enhances the flow.
But you certainly know the feeling of getting something beautiful, so beautiful as to move you to tears. We usually keep such emotionally charged items in special boxes or folders, that speak to us beyond words. Please, consider beauty as a very important take-away from your event. And, do not misuse it. Most papers and digital materials are more valuable being plain and easy to adjust to future variations. But one or two artefacts might be extraordinarily beautiful... They will additionally anchor the event in the participants' memory.

The invitation is an integral part of the preparation. This is your chance to set the stage for building trust and to enable the transformation to begin. This is your playground to spark participants' curiosity. Inviting is making it clear you will not push anyone into doing anything they don't feel comfortable or ready to do. Inviting means giving the participants the responsibility to choose how they want to learn and how deep they will go. The elements you want to tick off in your invitation are the obvious 5W+1H ones: what-when-where-who-for whom & how. In order to enhance the potential for transformative learning, the following elements can also be useful.

- Intention - Adding the purpose to the invitation gives it a backbone. It anchors the reader's attention. Here you would mention the purpose on the level of the client/participant: Why is this programme offered to them?

- Desired outcomes - Translate the process you will offer into the results the participants will get. You can simply copy and paste the VISION part of your design. A common mistake is to invite people to join by talking about the process whereas the people will join or have more motivation to be fully present if you describe the results, the desired outcomes.

- If participants have clarity about what to expect and what is expected of them, they will step into the process with fewer unknowns and consequently less doubts or anxiety. Unfortunately, if you want to clarify all the unknowns, you might end up with a long invitation in danger of not being read at all. Try to strike a balance between information and style to entice the reader to continue.

- Make it beautiful - We live in a visual age and the aesthetics of our invitation can play a crucial role in how professional you will appear and therefore, how much authority the participants will accord you. A step further than a Power Point can be using a free online tool like www.Canva.com where you can choose a beautifully designed template or start from scratch. Get curious and enjoy the creation.

- Your own values and style. Dare to put your own values up front. Let what you stand for shine through the text. People tend to trust people with a stand more than those who shy away from making a statement.

Invitation

I had the opportunity to attend Lonny Gold’s sessions at the Transformative Edge Workshop in Fužine Croatia (run as a part of the same project as the production of this book). Lonny is the most amusing teacher I’ve ever met, and the author of the Suggestopedia chapter in this book. Do not miss either him, if you have such luck, nor the chapter! Lonny provided very active and interactive exercises, full of fun, movement, music, play, action... Unforgettable joy of learning in a very new style for me!

Of course, some participants began to take notes during Lonny’s sessions. This distracted not only them but also others, since we were all dependent upon each other. Lonny released the need for taking notes, promising to give us materials, questions and answers, and all we wanted to take away. It was such a relief! (Of course, Lonny travels with the biggest suitcase he can carry with him by public transport.)

JASENKA
Invitations: a personal story

For years I have been teaching facilitation at an alternative business school. And it was well known that the students there were not very keen on showing up in time for the classes. Many times the invitation was the first contact with the students so I took it as an opportunity to set the ground and give them clarity on what happens when anyone arrives after the class has started.

I don’t believe in reprimanding anyone for being late. Not even in giving anyone ‘the look’. I believe in giving clear responsibility to the participants when it comes to their own learning process. So, if someone arrives late, I come from a belief that they had more important things to do and that it was their choice to be late. All of my invitations are a reflection of that.

In that school I included a gentle invitation to show up in time and the reason why that is important, the impact it has. If they will be late, I urged that to be their choice and not an excuse for poor priority organisation.

With time, my classes were probably the only ones where the students came in time or chose not to show up at all and communicated that in advance to both colleagues and me without being asked. They took the responsibility for their learning into their own hands and made informed decisions about where to invest their time and energy. You can imagine that also made a big impact on the quality of work we did with the students present.

Neža

Prepare the Space

This is a really juicy part of event design and delivery! Where will it take place? The answer depends on several factors, all previously defined under the vision part of the medicine wheel thinking process.

It is important to notice that there are many levels of “space”. The first thought is physical space, or a venue. But, let us also consider the collective space created among participants (and locals?), surroundings and nature as part of the holding space, spiritual space. There are so many dimensions that the whole process can easily become overwhelming. So, let us stay practical and as grounded as possible.

Retreat or not

There are significant differences if we keep the whole group of participants “under a roof” during the whole process. If people spend their time from morning routine (yoga, meditation, walking outside…) to evening parties together (movie night, board games, dance, small group conversation…), they might connect on a much deeper level than having only planned sessions together, not even spending lunch time in a group. Definitely, the whole spectrum of choices is between these two extremes. What we want to stress is the importance of consciously considering positive and negative effects of time and space sharing by participants.

Delivery
It is a note about an extreme situation, but I want to describe what safe space means to me. It was 6.30 am, Sunday morning. Very noisy, like a hungry beast roaring, and shaky - a 5.5. Richter earthquake woke us up. Terrifying. The day before, a lockdown because of COVID-19 had been announced, and we went to bed knowing that we are supposed to stay home. So, how those two come together: going to bed knowing that we should not leave our home and such a furious expression of nature, which unconditionally requires us to go out before walls start to fall...

Our three kids looked at us, my husband and me. We were surprised, disoriented and... peaceful. We felt safe in our home. It stayed firm, embracing all in it; not a single picture fell from the walls, nor a book from any shelves, glasses stayed on desks...

But, what provided a safe environment for our youngsters was actually our attitude. We are dedicated to solving problems as they arise, not to be afraid and make a problem.

We knew the first quake was just that: the first. Together, we waited for the second quake, and since it was much weaker, we decided not to leave our home. The children went back to bed and we went to buy fresh bread. Our neighbours stayed outside, freezing, waiting for yet another quake. (They’ve been coming and will be still active for months, specialists say.)

Of course, anyone has his or her own opinion and philosophy of how to handle such a situation. I am glad that we, my husband and I, have our own. No panic. Embrace whatever comes. Look on the bright side. Believe in life. This is our way of creating safe space for our children.

Very similarly, I encourage workshop participants to create safe space for themselves and for each other. Stay centred, be aware of your inner state, take care of your boundaries. If you need help, we are all here to help each other.

Zagreb, the evening after the Earthquake on 22 March 2020, during the COVID-19 pandemic

There is much more to be said about creating a safe environment for our participants. Three important principles are clarity, personal responsibility, and reflection.

Be as clear as possible what you invite your participants for. Co-creation is always a risky process, but necessary to engage as many as possible. Without engagement, transformation cannot happen.

It is of the most importance for participants to take responsibility for themselves. They are guardians of their boundaries. They are owners of these stories. Invite them to share only what they are comfortable with.

No one can be responsible for triggers in others. We, as facilitators, are responsible for clear and transparent intention. And, if emotions arise, acknowledge them, validate, and help to deal with them as well as possible in the situation, according to our ability and space in the process.

We can prevent a lot of tears if we attract participants who are already in an ongoing transformative process.

Use every opportunity to widen the distance between the observer, the “I”, and events in human beings, like body sensation, emotions and thoughts, both in yourself, and in your participants.

Reflect, reflect, reflect: provide experience, and then provide time and ways to make meaning out of the experience. Help your participants to understand what is their attitude and why, on which assumptions they build their interpretation. That is at the core of transformative learning.
Physical Space

Below is a list of principles - our principles, for you to build on and add details.

LIST OF IMPORTANT VARIABLES

- Private (the space is reserved for you in good time for preparation, and is used only by your group during the event, so you can "occupy" the space and securely leave not too valuable stuff).
- Beautiful (you know the effect of first impressions, don’t you?)
- Comfortable (warm, but not too worm; for sitting, lying down, dancing…)
- Spacious (more than just enough for all planned activities)
- Supportive (e.g. if you will use a projector, you need curtains on windows)
- Well equipped (whatever it means for you, from VR equipment to flipcharts and pencils)
- Clean (slippers/house shoes in the session rooms)
- With natural air (if it is comfortable, the right temperature, smell and level of noise :-)
- Plants, real ones
- Movable furniture (may include e.g. bean bags, yoga mats, cushions)
- Protected for "dirty" work, if it is planned (e.g. protect surface for drawing with watercolours if needed…)
- In nature or with garden access to ensure contact with other living beings
- Delicious, nutritious, light food
- Fruits, water and hot drinks during the whole event

Engage the Senses

There is a lot of research, as well as practical experience, showing that learning goes quicker and deeper when multiple senses are engaged. Think, for instance, of Howard Gardner’s proposal that intelligence is formed out of multiple abilities. He recognizes eight intelligences: linguistic, musical, spatial, intrapersonal, interpersonal, logical-mathematical, bodily-kinaesthetic, and naturalist. We agree with some other authors, like Levin, Zohar and Covey, and propose spiritual intelligence as fundamental for making use of the other intelligences. The more of these ‘intelligences’ that are engaged, the better the learning process.

In this book there are examples of several methods that appeal to two or more of the senses; for instance, dance and drama. In particular the chapter on Suggestopedia speaks to a pedagogy that purposefully combines many of them.

At the transformative edge is the design that confronts participants with new sensations: for example, those who are used to group bodywork with music may find their transformative moments in art or silent meditation - or even at a lecture.
Have you ever considered creating a transformative learning space online?

There is a strong preference for offline when it comes to imagining transformative learning processes. Here, we challenge you to embrace the online space as an equally strong option for guiding such an event.

Whatever your preference, it can be liberating to play with both dimensions. We live in an online world as well. There is no reason to limit ourselves and the learning of our participants to only one medium if one can enhance the other.

Transformative learning is “... learning that transforms problematic frames of reference to make them more inclusive, discriminating, reflective, open, and emotionally able to change” (Mezirow). In this context the possibility to broaden perspectives and to achieve Aha! moments does not depend on the source of inspiration nor on the way through which inspiration reaches us. Therefore, if “transformative inspiration” can hit anyone anywhere, what is crucial for us as transformative learning facilitators to bear in mind using different environments (virtual or physical)?

APPLICATION

Maybe you build an event entirely online, or maybe you run a series of follow-up support group meetings.

BENEFITS

Like it or not, you certainly experienced hugging habits on transformative events. Can you recall the feeling when another person’s body fully embraces yours, when you feel tensions relax, connection, warmth, breath and even tears on your face? Right, that could not happen online.

But also, do you remember the experience of seeing on the screen beautiful, joyful faces of your participants? They took the time to share their real life energy and vibes, topics and life streams. Active involvement in their life provides opportunities to facilitate ongoing transformations, to encourage, teach, challenge and celebrate with them in real-time.

CONSTRAINTS

Facilitation in physical space requires physical presence. So obvious, and yet, very important to bear in mind. To move physically requires “big space” also in a participant’s calendar. Travelling, arranging families and business affairs during absence from “real life”, plus accustomization to a new place, might be tiring or stressful. A face to face event must compensate for that investment.

An online event, on the other hand, almost always has to slot into the ongoing stream of daily activities. Only very conscious and mature “digital inhabitants” prepare themselves for online events: providing enough time for transition between previous activities and the online event, staying fully dedicated to the event (not being tempted for multitasking, from cooking to web-browsing in the other window), and open enough to other participants to build meaningful, deep connections with them, which is so necessary for creating a safe space and the experience of being seen, heard and empathised with.
Prepare Yourself

“Prepare yourself” is a part of delivery. The iterative process of taking care, fulfilling our needs, focusing our minds and elevating our spirits, in order to serve the transformative learning of the whole group, is part of delivery.

Transformative learning, by definition, implies that both participants and facilitators learn. There is no prescribed transformation. Whatever happens is welcomed with curiosity and kindness, as a learning per se. In order to be fully in that process of discovery, with our personal and professional responsibility to trust in people and process, we need to be in good form and fully content.

Prepare your Body

It seems easy: eat healthy, light food, get enough sleep and practice energising intimacy, and the body will be functional. It is not helpful if your spirits are low, mind full of doubts, or emotions flow like a wild river. But still, the body is a good point to start, every morning and in every break. Provide fresh air, enough water and fruit. Practice proper, dedicated, sincere hugs.

You might look for professional help: hairdresser, Shiatsu practitioner… Jasenka schedules appointments like that before every bigger TL event. Routine, ritual and a nice treat help her to focus on herself.

Modulate your Emotions

Whatever serves you, make enough room for it during a TL event. Walk in nature. Have a long shower. Swims. Write a poem. Practice t’ai chi. Watch a movie, read a book and/or listen to music to (re)set your emotions. Exercise and develop the competence “Self Knowledge” :-)

Cultivate your Mind

What is the best way for you to empty your mind? Playing with children? Meditating? Cooking? Whatever, plan it in advance, in order to have enough time to shift your mind into that empty space of pure joy and wonder. Excessive to-do lists, shoulds, worries, they all get in the way of inspiration, spontaneity and improvisation. After finishing preparations and checking the to-do list, it’s time to invite your mind to serve the event with elegance and ease. Do not forget: “Mind is a terrible master, and great servant.”

Be in your Purpose

Now it is time for the master to take centre stage and start to conduct. Being in your purpose means engaging all your human capacities in an orchestra conducted by the spirit.

When the participants find their way to play in and with the TL event together, you want to be in the same spirit with them, fully emerged in the collective field. We wish you clear intention and sharp attention at every TL event!
Follow up

The moment you conclude the process live, whether it is online or offline, your responsibility as a guide of the process ends. The participants are now responsible for taking the learnings further, to ‘bathe’ in the inspiration and motivation you helped to create as the facilitator. To take action. However, what you do right after the event can have a big impact on how they will go about their life after the event.

An immediate follow up will make sure your event will get anchored. It is always a nice touch if you add a personal note or an anecdote from the event. However, the main content should include:

• Materials, handouts, or other resources you mentioned
• Contact lists (if they gave you official approval to do so)
• A working link to a photo gallery of the event (Make sure you tell them upfront you will be taking pictures. If anyone feels uncomfortable with this, respect their wishes),
• Remind them of the next steps,
• Transfer the responsibility for action to the participants and round off the process.

Support for the Transformation

Transformation can be a long process. Never-ending, even. Your event might start it or it might give the final push the person needed to really get into action. Wherever the person might be, they will need support to get to the next stage of their journey.

Unfortunately, many of us are not really good at asking for support. Especially when going through the valleys or the uncomfortable moments of a transformative process. The good thing is that you, as the guide of this event, can creatively plant seeds of support that will hopefully spring into full bloom when the person will need it.

Creating a buddy system for support or peer to peer coaching pairs while the people are still at the event, be it online or offline, is a great way to hand the responsibility for action to the participants and yet, you designed for it to happen.

Asking participants to write their future selves a letter with wisdom they wish to never forget from the event and then send it to them a few months later does wonders.

Writing them a personal love letter with the changes you witnessed in them as an observer or reminding them of nuggets of wisdom they highlighted as their Aha! moments can go a long way. To feel seen is unbelievably powerful.

Get creative and have fun with this one.

A PERSONAL STORY

I love creating ways for the participants to step into the ‘life after’ in a fun, creative, and still very pragmatic way. Here is a story about one of them:

Ten curious, bright women came to my 3-day event about how to start a business in a holistic way. They danced to their values, created art around their purposes and shared stories around the fireplace about how their inner critic is holding them back from action. As we sat in the circle on our last day together, I invited them: ‘Take a look at the woman directly across you in the circle. ’They looked at each other with curiosity and teenage-like giggles. ‘She is your new celebration partner. She will listen to you, encourage you and help you on your path after we part ways. Go sit with her and find a date when you will first meet online. You will get a list of suggestions on how to go about your meetings so you’ll get the support you both need.’

After that I finished the event and hugged the women goodbye. Almost two years later, an occasion brought us back in contact and they all told me they have been regularly in contact with their celebration partners. They showed up to their meetings religiously and helped each other create thriving businesses.

When I suggested they should work in those pairs, I had hoped they would meet a couple of times. But I never imagined they would go on for so long. My support seedling grew into friendship trees. I was in awe!

Neža
It is valuable to know what kind of atmosphere you want to create. For instance, an event can be a workshop, conference or festival.

Workshop, training or seminar are different forms, but more or less, they are focused on competence development. Conferences spread the horizon, bring new perspectives, challenge the status quo. But festivals, learning festivals, they are super demanding, super influential, and really transformative! Festivals allow us to “be too much”, to act out, show up, to laugh loud, to live loudly. They are invisibly facilitated, but greatly organized. Knowledge is presented by behaviour. Impressions might trigger long forgotten emotions, deep buried memories. Dare to organize festivals! They are such great learning events...

This book probably would not happen, if Jasenka, Ursel, and Marco had not met at the Changemaker Festival in Järna, Sweden in July 2013. It was a dream-like event at the end of the International Partnership for Transformative Learning Grundtvig project led by Boris and Jutta Goldammer of Visionautics (the lead partner also for this project).

Five days, 80 people lived together, enjoying miracles that eight partners of the project created together at the very end of the project: we walked on live coals, learned to tango, created sculptures from old bicycles… There were so few words and so much music and action. The venue was just perfect. Nature supported us in the best possible way. There was no time to sleep.

In such an intensive event, common experience built a creative momentum that can have unbelievable long-term outcomes.

Do you consider creating such a transformative event? If yes, then better prepare a really strong core team to make it happen. And ensure that everyone reads this book before you start designing it :-)

A gentle reminder: every time you create an event you are creating an opportunity for a group of people to go beyond what they expect from the content you will offer them. What a beautiful responsibility!

Let every lesson be a feast for the innate curiosity of every human being. Let every event you create be an exploration for yourself as well.

Celebrate your wins and losses and never celebrate alone. Share the stories with us here (insert the website where they can post their wins)

JASENKA
One Example

Zsuzsa Vastag

As an example of event planning we offer two versions of the planning for the first Transformative Learning workshop: first the way the event was planned, second reflecting what really happened and the changes the facilitators made to the original design, and why.

Yes, plural facilitators. This was an unusual situation: a whole team of facilitators without any one taking the leading role. That in itself was an experiment, and not necessarily a model to recommend. Some of the adjustments needed were clearly related to this particular situation.

Indeed it is not our intention to present the way to do it. See it as a starting point to discover something you might not have tried before. Hopefully, it is the start of your next transformative journey as an adult educator. Enjoy the ride!

Original Design

We designed the curriculum in a six-month iterative process, starting by designing the flow of the training: the topics of each half-day session. For each session, two facilitators designed a programme of activities. Before the actual training, we had several sessions of checking in, looking at the whole picture to see if the activities fit together.

See below:
1. Our original plan
2. The programme as actually carried out
3. Reflections on the changes

1. Original Plan

Daily Routine

<table>
<thead>
<tr>
<th>Time</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.00 - 9.00</td>
<td>Morning practice</td>
</tr>
<tr>
<td>9.00 - 10.00</td>
<td>Breakfast</td>
</tr>
<tr>
<td>10.00 - 10.30</td>
<td>Check-in</td>
</tr>
<tr>
<td>10.30 - 13.00</td>
<td>Morning session</td>
</tr>
<tr>
<td>13.00 - 14.00</td>
<td>Lunch</td>
</tr>
<tr>
<td>14.00 - 16.00</td>
<td>Own time</td>
</tr>
<tr>
<td>16.00 - 16.30</td>
<td>Personal reflection groups; Facilitators’ time</td>
</tr>
<tr>
<td>16.30 - 18.45</td>
<td>Afternoon session</td>
</tr>
<tr>
<td>18.45 - 19.15</td>
<td>Professional reflection</td>
</tr>
<tr>
<td>19.15 - 19.30</td>
<td>Check out</td>
</tr>
<tr>
<td>19.30 - 19.30</td>
<td>Evening programmes offered by participants</td>
</tr>
</tbody>
</table>

Day 1: Landing

Main Question / Topic of the Session

<table>
<thead>
<tr>
<th>Day 1: Landing</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Morning</strong></td>
</tr>
<tr>
<td>Welcome and Introduction - Who are you?</td>
</tr>
<tr>
<td>Welcome</td>
</tr>
<tr>
<td>Creative introduction (including: pairs, collective storytelling)</td>
</tr>
<tr>
<td>Introduce the 6 competences</td>
</tr>
<tr>
<td><strong>Afternoon</strong></td>
</tr>
<tr>
<td>Why am I really here? What can I offer? What do I need to know?</td>
</tr>
<tr>
<td>Spirit animal for the week – Animal cards</td>
</tr>
<tr>
<td>Professional question to self – Deep Listening</td>
</tr>
<tr>
<td>What do I want to achieve? – Draw your timeline, share your intentions</td>
</tr>
</tbody>
</table>

Day 3: Start earlier (possibly wake up with the sun, to witness sunrise, nature’s transformation, as a metaphor for our own transformation), have a shorter afternoon session and spend the afternoon in Rijeka.
<table>
<thead>
<tr>
<th>Main Question / Topic of the Session</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Day 2: Disruption and Deepening the Process (“Something Happens”)</strong></td>
<td></td>
</tr>
</tbody>
</table>
| Morning | Initiate the iterative process of becoming clearer about dissatisfactions and hopes - What images of the future do you hold? - What hurts professionally and what is my drive for my work  
• Muse Kiss Model  
• Journalling  
• Visioning  
• Instant Painting |
| Afternoon | How am I a tool in my educational practice? What do I need, what do I want to learn?  
• Building stations |
| **Day 3: Silence, Inner Work** |
| Morning | What question is alive in me right now?  
• VisionQuest - Silent walk in nature  
• Getting the group back together  
• Shift the focus: what do I want for my participants  
• What is my ambition to enable them? |
| Afternoon | What are your next steps? What is your concrete project for the online part?  
• Market of landing opportunities – parallel sessions  
• Bench under the tree  
• Coaching circle  
• Coaching walk  
• Getting actual work done  
• …  
We frame their time - so they don’t lose focus. At the end of the session: peer group presentations |
| **Day 4: Rebuilding Freedom** |
| Morning | What did I learn, what can I bring home?  
Reflection and sharing  
What I created: how can I take it with me? |
| Afternoon | How have I changed? What has been my transformation?  
• What are you taking away, where do you/we go from here.  
• Share 3 moments of this week that were important to you.  
• Brushstroke  
• Goodbye |
| **Day 5: Harvesting, Celebration - How to translate this experience to my reality?** |
| Morning | What did I learn, what can I bring home?  
Reflection and sharing  
What I created: how can I take it with me? |
| Afternoon | What do you want to show, practice or test?  
• Participants offer workshops: Open arena  
• Participants share their experiences |
| Afternoon | What are your next steps? What is your concrete project for the online part?  
• Common trip to Rijeka  
• Market of landing opportunities – parallel sessions  
• Bench under the tree  
• Coaching circle  
• Coaching walk  
• Getting actual work done  
• …  
We frame their time - so they don’t lose focus. At the end of the session: peer group presentations |
2. What Happened

Needless to say, when we got together face-to-face, a number of adjustments needed to be made, as we encountered logistical issues, reflected on how the group was responding, and also realized that some of the activities did not feed so well into the next one as we had hoped. The themes of the sessions stayed the same but we adjusted the programme. Here’s what we did; major changes highlighted.

Daily Routine
8.00 - 9.00 Morning practice
9.00 - 10.00 Breakfast
10.00 - 10.30 Check-in + Professional reflection for participants
10.30 - 13.00 Morning session
13.00 - 14.00 Lunch
14.00 - 16.00 Own time
16.00 - 16.30 Personal reflection group; Facilitators’ time
16.30 - 19.15 Afternoon session
19.15 - 19.30 Check out
19.30 – Evening programmes offered by participants

Exception: Day 4 (Friday) – Instead of afternoon session trip to Rijeka / hiking trip

Main Question / Topic of the Session
Activities

Day 1: Landing

Morning
Welcome and Introduction - Who are you?
• Welcome
• Introduce yourself – Throw the Ball
• Overview of the week’s programme
• Warming up
• Introduce yourself – pairs
• Introduction of the Competence-tree
• Me and transformation – Collective storytelling

Afternoon
Why am I really here? What can I offer? What do I need to know?
• Spirit animal for the week – Animal cards
• Professional question to self – Deep Listening
• What do I want to achieve? – Draw your timeline, share your intentions

Day 2: Disruption and Deepening the Process (“Something Happens”)

Morning
Envisioning from a professional perspective
• Groups for professional introductions
• Professional roles, professional futures – Mask making

Afternoon
What is the transformation you wish to enable?
Where are you concerning your project?
• Clarity on expectation about participants’ own projects, prototyping – creative building stations
<table>
<thead>
<tr>
<th>Day</th>
<th>Main Question / Topic of the Session</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day 3: Silence, Inner Work</td>
<td>Morning What question is alive in me right now?</td>
<td>• Silent walk in nature</td>
</tr>
</tbody>
</table>
| Afternoon What do I need now to go forward? | • Market of landing opportunities – parallel sessions
• Discussions:
  • TL theory
  • Facilitation nuggets
  • Visioning tools
  • TL in different cultures
  • TL online
  • Project management – building models in the snow
• Coaching/Listening:
  • Master Mind coaching
  • 1-on-1 coaching
  • Listening
• +1: Massage |
| Day 4: Rebuilding Freedom | Morning What do you want to show, practice or test? Offers for future self (experimentation) or other future selves (experience) | • Participants offer workshops: Open arena
  • Personal and Professional roles roundtable
  • Ethics of TL facilitation
  • Difference between TL and therapy
  • TL in the university context |
| Afternoon | Participants offer workshops: Open arena |
| Day 5: Harvesting, Celebration - How do I translate this experience to my reality? | Morning What do you want to show, practice or test? Offers for future self (experimentation) or other future selves (experience) | Brushstroke
  • Evaluation (compost, suitcase, dustbin)
  • Arrangements for the online mentoring process
  • Goodbye – Throw the Ball |
| Afternoon What has been my transformation? What happened during the week? Where do we go from here? | Trip to Rijeka or Hike |
Personal and Intrapersonal

Knowledge, skills and attitudes having to do with the person and the way s/he behaves/performs; cf the UNESCO Learning pillar of “Learning to Be”. This parallels Competence 1, Self-Knowledge. Sub-competences are:

- **Self-awareness** - The ability to accurately recognize one’s own emotions, thoughts, and values and how they influence behaviour. The ability to accurately assess one’s strengths and limitations, with a well-grounded sense of confidence, optimism, and a “growth mindset.” Including:
  - Identifying emotions
  - Accurate self-perception
  - Recognizing strengths
  - Self-confidence
  - Self-efficacy

- **Self-management** - The ability to successfully regulate one’s emotions, thoughts, and behaviours in different situations — effectively managing stress, controlling impulses, and motivating oneself. The ability to set and work toward personal and academic goals. Including:
  - Impulse control
  - Stress management
  - Self-discipline
  - Self-motivation
  - Goal-setting
  - Organisational skills

Interpersonal

Knowledge, skills and attitudes having to do with the person and the way s/he behaves/interacts with others; cf the UNESCO Learning pillar of “Learning to Live Together”, and with Competence 2, Working with People. Sub-competences are:

- **Social Awareness** - The ability to take the perspective of and empathize with others, including those from diverse backgrounds and cultures. The ability to understand social and ethical norms for behaviour and to recognize family, school, and community resources and supports. Including:
  - Perspective-taking
  - Empathy
  - Appreciating diversity
  - Respect for others

- **Relationship Skills** - The ability to establish and maintain healthy and rewarding relationships with diverse individuals and groups. The ability to communicate clearly, listen well, cooperate with others, resist inappropriate social pressure, negotiate conflict constructively, and seek and offer help when needed. Including:
  - Communication
  - Social engagement
  - Relationship-building
  - Teamwork

See also Wiek’s interpersonal competence
This can be compared/equated with UNESCO’s learning pillar of “Learning to Do”, and with Competence 6, Pedagogy: Sub competences are:

- Responsible decision-making:
  - Identifying problems
  - Analysing situations
  - Solving problems
  - Evaluating
  - Ethical responsibility

- Thinking skills:
  - Reflecting
  - Critical thinking
  - Systems thinking
  - Creative thinking

See also: Kahane; Wiek’s Strategic Competence; as well as Wals & Schwarzin:
- Active participation.
- The value of learning.
- Balancing the far and near.
- A case study approach.
- Social dimension of learning (connecting and mirroring learner’s ideas and experiences through social interaction).
- Learning for action (development of action competence).

Wals & Corcoran also mention Total immersion (direct experience with the world) and Diversity in learning styles (being sensitive to different learning styles within the group). O’Donohue refers to reflexive learning around tensions, discontinuities and risks in local contexts in multi-actor groups.

This category can be compared/equated with UNESCO’s learning pillar of “Learning to Know”. It comes closest to Competence 4, Riding Complexity.

Some references:
Wals & Schwerzin: “… a more systemic and reflexive way of thinking and acting, bearing in mind that our world is one of continuous change and ever-present uncertainty. This suggests that we cannot think about sustainability in terms of problems that are out there to be solved or in terms of ‘inconvenient truths’ that need to be addressed. Instead, we need to think in terms of challenges to be taken on in the full realization that, as soon as we appear to have met the challenge, things will have changed and the horizon will have shifted once again.” (p. 13)
ANNEXE 2. Multiple Perspectives on TL

Frans Lenglet

Each perspective is preceded by a set of key words delineating the perspective.

1. Key words: (Key) Competences; Sustainability Competences


The article identifies the relevant literature on key competencies in sustainability; synthesizes the substantive contributions in a coherent framework of sustainability research and problem-solving competence; and addresses critical gaps in the conceptualization of key competencies in sustainability. Insights from this study lay the groundwork for institutional advancements in designing and revising academic programmes; teaching and learning evaluations; as well as hiring and training faculty and staff.

Key competencies provide an explicit and commonly shared framework for developing distinct and recognizable profiles of the academic field, the schools, the graduates, the professions, and so forth. Moreover, key competencies provide the reference scheme for transparently evaluating student learning and teaching effectiveness.

Competences are distinguished from learning outcomes – the former being fairly abstract and therefore in need of translation into specific learning outcomes to be operational (e.g., for curriculum development). The five key competences are:

1. Systems thinking competence – also Systemic, interconnected, holistic thinking
2. Anticipatory competence – also Anticipatory, future, foresighted, trans-generational thinking
3. Normative competence – also Value-focused, ethical thinking, orientation thinking/knowledge
4. Strategic competence – also Action-oriented competence, transformative competence, implementation skills
5. Interpersonal competence – also Collaborative, participatory, interdisciplinary, civic competence.

The relationships between these key competences are illustrated in Figure on the right. (graphically adapted after Wiek et al, 2011, page 206)
2. Key words: Education for Transformation; the banking concept of education; education as liberation; problem-posing education; education as dialogue


In Brazil in the middle of last century, Freire developed an approach or method for teaching illiterate people, especially adults. It is based on the insight that in learning to read and write the learners come to a new awareness of selfhood and begin to look critically at the social, economic and political conditions in which they find themselves. In the process they may take the initiative in acting to transform these same conditions that have denied them the opportunity of participation. Education rather than being an instrument of maintaining the ‘culture of silence’ associated with their conditions, becomes an a ‘subversive’, ‘transformative and ‘emancipatory’ instrument.

Pedagogy of the oppressed “makes oppression and its causes objects of reflection by the oppressed, and from that reflection will come their necessary engagement in the struggle for their liberation. And in these struggles this pedagogy will be made and remade” (page 33).

From a situation of direct engagement in the struggle to liberate men and women for the creation of a new world (Brazil in the 50s and 60s of last century), Freire reached out to the thought and experience of those in many different situations and of diverse philosophical positions including Jean-Paul Sartre, Emmanuel Mounier, Eric Fromm, Luis Althusser, Ortega y Gasset, Mao Tse-tung, Martin Luther King, Che Guevara, Miguel de Unamuno, Herbert Marcuse, Frantz Fanon, Régis Debray, Reinhold Niebuhr, Alfred Memmi and Martin Buber.

The usual education is an act of depositing, in which the students are the depositories and the teacher is the depositor. “This is the banking concept of education, in which the scope of action allowed to the students extends only as far as receiving, filing and storing the deposits” (page 58). The opposite of ‘banking education’ is ‘libertarian’, ‘liberation’ or ‘problem posing’ education. In the banking concept of education, knowledge is a gift bestowed by those who consider themselves knowledgeable (teachers) upon those whom they consider to know nothing (students). “In problem-posing education, [learners] develop their power to perceive critically the way they exist in the world with which and in which they find themselves; they come to see the world not as a static reality, but as a reality in process, in transformation” (emphasis by author) (page 71). This is achieved through a process of dialogue and action between and among the teachers and the students. Dialogue “is an act of creation” (page 77). Dialogue requires love, humility, faith, trust, hope and critical thinking. Dialogical action is characterized by cooperation (not: conquest), unity of liberation (not: divide and rule), organisation (not: manipulation) and cultural synthesis (not: cultural invasion).
3. Key words: Sustainability; community-based initiatives; dialogue; transformative social learning; relational pedagogy; Freire


This article investigates the relevance of the work of the Latin-American thinkers Humberto Maturana and Paulo Freire to learning-based transformations towards sustainability. This analysis was inspired by a case study of a Brazilian urban community seeking to develop pathways towards sustainable living and was informed by a review of their key works. The paper aims to obtain a better conceptualization of learning-based transformations and provide insights into collective learning processes focused on advancing sustainable practices. We present notions of the transformative social learning approach that underpins the case study, using the concepts of Maturana and Freire as a lens. Our results indicate the importance of a relational approach in fostering collective learning processes. Finally, we derive three principles that can guide such processes: (1) facilitating transformative interactions between people and places, (2) enabling dialogic interaction within a climate of mutual acceptance, and (3) creating space for ontological pluralism.

4. Key words: Transformative Learning; shift in consciousness; power relations; structures of class, race and gender; Mezirow; Freire

Transformative learning accords a central role to the process of ‘meaning perspectives’ through which we make sense of everyday life (Mezirow, 2000). Transformative learning is a form of third order learning leading to “the experience of seeing our worldview rather than seeing with our worldview”. Both Mezirow and Freire have influenced the current understanding of transformative learning, which “involves a deep structural shift in the basic premises of thought, feelings and actions. It is a shift of consciousness that dramatically and permanently alters our way of being in the world. Such a shift involves our understanding of ourselves and our self-location: our relationships with other humans and with the natural world. It also involves our understanding of power relations in interlocking structures of class, race and gender, our body awareness, our visions of alternative approaches to living, and our sense of possibilities for social justice, peace and personal joy.”


5. Key words: Transformative Learning; transformative learning methods and techniques

Rob Plastow (2008?), Fostering transformative learning in education for sustainable development (ESD): A review of the literature on transformative learning for practitioners of ESD.

This review of the literature seeks to provide the ESD practitioner with an overview of theory and research in transformative learning. Transformative learning is defined as a process by which previously uncritically assimilated assumptions, beliefs, values and perspectives are questioned and thereby become more open, permeable, and better justified. At its centre it is a challenge of our beliefs, assumptions, and perspectives that leads us to question ourselves.

The review distinguishes six TL approaches: psychoanalytic, psychodevelopmental, social emancipatory, neurobiological, cultural-spiritual and planetary.

The review distinguishes four categories of methods and models:

• Critical reflection (related to content, process and premise)
• Discourse and meaning-making through dialogue, storytelling and perspective sharing
• Facilitation and self-direction
• Action (necessarily associated with critical reflection).

It lists the following teaching/learning techniques: reflective journaling, metaphor analysis, concept mapping, consciousness raising, life histories, repertoire grids, participation in social action, role examination through role play, and verbal reflection through discussion. The key message being to help the learners actively engage the concepts presented in the context of their own lives and collectively critically assess the justification of new knowledge.

6. Key words: Dialogic Interaction; Sustainability Competence


This paper examines dialogic interaction as a key element of achieving a transition towards sustainability in people, organisations and society as a whole. Furthermore “sustainability competence” as a potential outcome of such interaction is to be introduced, referring to the capacities and qualities that people, and the organisations and communities of which they are part, need in order to address (un)sustainability.

Conceptually, the argument of the paper is grounded in emergent thinking among scholars preoccupied with learning-based change and sustainability in organisations and communities. Empirically, the paper uses two case studies carried out by the authors to ground the argument in real efforts by communities to create a (more) sustainable way of living.

The main results include: a post-normal understanding of sustainability highlighting uncertainty, complexity, normativity, controversy and indeterminacy; a framework facilitating dialogic interaction; and a number of key competences that appear conducive to both dialogic interaction and a transition to sustainability.

The paper adopts a post-normal perspective of organisational transitions towards sustainability and focuses on dialogue and dialogic interaction as a key learning-based mechanism for facilitating such a transition. Furthermore, the framework for dialogic interaction allows for a more holistic approach toward such a transition and the development of competences needed to accelerate its realization.
7. Key words: Transformative and Transgressive Learning; higher education pedagogy; capabilities approach; agency; Mezirow; Nussbaum; Sen.


The nature of the sustainability challenges currently at hand is such that dominant pedagogies and forms of learning that characterize higher education need to be reconsidered to enable students and staff to deal with accelerating change, increasing complexity, contested knowledge claims and inevitable uncertainty. Then paper identifies four streams of emerging, transformative, transgressive learning research and praxis in the sustainability sciences that appear generative of a higher education pedagogy that appears more responsive to the key challenges of our time: (1) reflexive social learning and capabilities theory, (2) critical phenomenology, (3) socio-cultural and cultural historical activity theory, and (4) new social movement, post-colonial and decolonisation theory. The paper critiques the current tendency in sustainability science and learning to rely on resilience and adaptive capacity building and argues that in order to break with maladaptive resilience of unsustainable systems it is essential to strengthen transgressive learning and disruptive capacity-building. Sustainability concerns are most often described as ‘wicked problems’ or nexus issues characterized by high levels of complexity, ambiguity, controversy and uncertainty both with respect to what is going on and with respect to what needs to be done. The indeterminate and boundary crossing nature of sustainability issues, coupled with the urgency to act, makes for a volatile environment in governance, policy, education and research, and creates new challenges for higher education. It also creates new challenges for rethinking learning and pedagogy. There is, therefore, a need to adopt a transformative approach of ‘thinking how the object of study itself is constituted, what tools are used to study it and what concepts are used to frame it’

In seeking a science that is more reality congruent, transgressively transformative and more reality engaged, it is not surprising therefore that the sustainability sciences are turning to transdisciplinarity as a means of transformatively engaging the world, involving co-engaged forms of knowledge production and pedagogy.

Mezirow’s view of transformative learning is often used to frame discussions on transformative learning, its focus is mainly in on cognitive transformation/s of individuals. This does not fully theorise the relationship between cognitive transformations and social action or agency, especially collective transformation of human activity. The capabilities approach reminds us that transformative and transgressive learning, including the beings and doings that such learners enact, may function as one dimension of human flourishing (speaking with Nussbaum) or freedom (speaking with Sen) and as such is an end in itself.

In an expansive learning processes, which also foregrounds cognitive justice (i.e. where the views of all multi-actors are afforded value and validity in engaging contradictions and seeking out new forms of human activity), new forms of agency emerge which can be identified via various ‘agency expressions’ that include resistance, critique, explication, reframing, envisioning, committing to actions, navigating power relations and taking transformative action.
8. Key words: Transformative Learning; critical theory; recognition theory; emancipatory learning; Mezirow; Habermas, Honneth


Mezirow’s theory of transformative learning has always relied on the work of Jürgen Habermas in order to give it a sound theoretical base. This chapter outlines Mezirow’s theory of transformative learning attending to its reliance on critical theory which contributes important concepts such as domains of learning, emancipatory learning, critical reflection, and the discourse of communicative action. This chapter explores how the work of Habermas and elements of his critical theory not utilized by Mezirow enhance the rigour of Mezirow’s work. An argument is made that allows us to interpret transformative learning theory as a critical theory. As a new generation of Frankfurt School scholars create the next iteration of critical theory, the implications of Axel Honneth’s recognition theory are identified for the theory and practice of transformative learning. The communicative turn of Habermas and the recognition and emancipatory turns of Honneth contribute significantly to the evolution of transformation theory.

9. Key words: Transformative Learning; assimilative learning; 5 antecedents of transformative learning; strategies and methods.


Transformative learning is in clear contrast to the more common process of assimilative learning, the type of learning that takes place when students simply acquire new information that can easily fit into their pre-existing knowledge structures. Whereas some college-level courses are aimed at assimilative learning, most courses require at least some level of transformative learning. According to transformative learning theory, paradigm shift/perspective transformation is the result of several conditions and processes:

1. An activating event that exposes the limitations of a student’s current knowledge/approach
2. Opportunities for the student to identify and articulate the underlying assumptions in the student’s current knowledge/approach
3. Critical self-reflection as the student considers where these underlying assumptions came from, how these assumptions influenced or limited understanding
4. Critical discourse with other students and the instructor as the group examines alternative ideas and approaches
5. Opportunities to test and apply new perspectives.

Detailed strategies are presented for each process involved in transformative learning. They include:

• The Activating Event: can be anything that triggers students to examine their thinking and the possible limitations of their understanding
• Identifying Current Assumptions: The best strategies for helping students identify their current assumptions all require that students explain their thinking
• Encouraging Critical Reflection: students privately examine their current assumptions
• Encouraging Critical Discourse: the most social aspect of transformative learning. Create opportunities for students to reflect through conversation
• Giving Students an Opportunity to Test a New Paradigm or Perspective: activities and assignments that empower students to apply new approaches with a high likelihood of success
• Fostering Intellectual Openness: instructors practice “seasoned guidance” and “compassionate criticism.”
10. Key words: Situated Social Learning; competences; abilities and attitudes.


The modernist expansion of education is examined to explore how the concept of Education for Sustainable Development (ESD) has emerged, is being worked with, and is being assessed in imperatives intended to foster social-ecological change on a global scale. The opening review sketches how education developed as a mediating process in modernity, tracking some recent shifts that are shaping ESD in more and more diverse contexts of education practice. It scopes an ESD terrain where knowledge and ethics-led learning in relation to valued purposes might enable citizens to become engaged in change that secures a sustainable future for generations to come. Within these processes, competence specification is examined as a useful but under-theorised social imaginary for framing learning for future sustainability, primarily in teacher education and curriculum contexts. Here, ESD presents as an open process of situated social learning where emergent competences steer social innovation towards a more sustainable future (SD). The paper attempts to navigate some of the current tensions in relation to knowledge and participation in these processes of learning-to-change. It probes ESD as praxiological processes of dialectical reflexivity that can become situated in contexts of risk and develop as transgressive expansions within many conventional learning sequences in curriculum settings. The paper notes that current discourses on ESD and its as-

<table>
<thead>
<tr>
<th>Targeted intervention 70s</th>
<th>Participatory critical process of problem solving enquiry 80s – 90s</th>
<th>Competence for educator / learning practices to achieve sustainability. UN-DESD 2005-2014</th>
<th>A expanded framework for ESD as reflexive critical processes of change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create awareness</td>
<td>Collaborative / Constructivist</td>
<td>Learning to know</td>
<td>New environmental systems knowledge</td>
</tr>
<tr>
<td>Change attitudes</td>
<td>Deliberative</td>
<td>Learn to be (Identity)</td>
<td>Ethics-led in cultural historical context</td>
</tr>
<tr>
<td>Change values</td>
<td>Situated values and purpose</td>
<td>Learn to live together</td>
<td>Valuing and purposeful learning with and from others</td>
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<tr>
<td>Change behaviour</td>
<td>Collaborative change</td>
<td>Learning to do</td>
<td>Agency and skills in stewardship actions</td>
</tr>
<tr>
<td>Get-to / get the message across</td>
<td>Collaborative change</td>
<td></td>
<td>Situated and purposeful learning in relation to valued practices and earth stewardship for the common good</td>
</tr>
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</table>

The article (O’Donohue, 2014) has a section on competences, with particular reference to UNESCO’s 4 learning pillars (see also Annexe 1)
learning of citizens and how these processes might produce the desired change towards sustainable development (SD) in diverse contexts of learning in and about a changing world.

assessment have often come to stand outside, and in contrast with, conventions of teaching and learning. These discourses also often conflate education and sustainable development in ways that ascribe change to ESD without adequately theorising the expansive and reflexive

<table>
<thead>
<tr>
<th>Sustainability Competence</th>
<th>Examples of Sustain'abilities'</th>
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</thead>
<tbody>
<tr>
<td>Dynamics and content sustainability</td>
<td>Sustainability literacy, systems thinking, adopting an integral view</td>
</tr>
<tr>
<td>Critical dimension of sustainability</td>
<td>Questioning hegemony and routines, analysing normativity, disruptiveness, transgression</td>
</tr>
<tr>
<td>Change and innovation dimension of sustainability</td>
<td>Leadership and entrepreneurship, unlocking creativity, utilising diversity, appreciating chaos and complexity, adaptation, resilience empowerment and collective change</td>
</tr>
<tr>
<td>Existential and normative dimension of sustainability</td>
<td>Connecting with people, places and other species; passion, values and meaning-making; moral positioning, considering ethics</td>
</tr>
</tbody>
</table>

The materials distinguish four dimensions of sustainability competence and associated sustain ‘abilities’. These can be compared with TL competences by substituting TL for sustainability (see Table 2).

A sustainability facilitator is someone who:
- Keeps the learning process open (ensures access to the process, openness regarding the agenda, transparency of the process)
- Creates social cohesion and a pleasant atmosphere (physically, socially, psychologically)
- Guarantees basic levels of comfort and safety (protection against risks resulting from participation; no attribution and no retribution)
- Knows how to deal with conflicts that arise
- Monitors progress (including the ‘soft’ results in terms of people’s earning, social cohesion, motivation, commitment, etc. along with the more concrete ‘socio-ecological outcomes’ such as increased biodiversity, reduced CO2 emission, improved health, etc.)
- Can articulate and show how progress has been made
- Ensures sufficient stimuli, challenges and a ‘sense of urgency’ to keep energy levels high
- Can keep the focus on the choices that have been made and the path that has been chosen, but is also able to invite the group to reflect on those choices and to challenge them to leave it as circumstances might change

The process facilitator must also make sure there are suitable work styles (role playing, excursions, simulations, etc.) materials (flip charts, apps, image material, PowerPoint, etc.), feedback mechanisms (newsletter, website, progress reports, blogs, tweets), and will need to monitor external relations (contacts with those granting subsidies, the environment of the process, interested outsiders). Furthermore, a process facilitator is a good listener, sensitive to signs (political, emotional), a good manager/organiser, breeds trust, is a good navigator in areas of tension, a good discussion leader, an animator and has no hidden agendas. It is not always necessary that all these responsibilities and qualities can be found within one single person, they can also be distributed among multiple people who complement each other.

11. Key words: Sustainability Competences; qualities of learning facilitators; sustainability learning methods


The process facilitator must also make sure there are suitable work styles (role playing, excursions, simulations, etc.) materials (flip charts, apps, image material, PowerPoint, etc.), feedback mechanisms (newsletter, website, progress reports, blogs, tweets), and will need to monitor external relations (contacts with those granting subsidies, the environment of the process, interested outsiders). Furthermore, a process facilitator is a good listener, sensitive to signs (political, emotional), a good manager/organiser, breeds trust, is a good navigator in areas of tension, a good discussion leader, an animator and has no hidden agendas. It is not always necessary that all these responsibilities and qualities can be found within one single person, they can also be distributed among multiple people who complement each other.

Table 2

Reference

ANNEXE 3. The Contributors

Ursel Biester  Coach, Author, Project initiator
Akademie für Visionautik — visionautik.de  ursel.bi@gmail.com

Manuela Bosch  Consulting & Research on Collaboration, Community Building and Global Organizing; Vision Quest Guide, Embodiment Practitioner; former Advertising Industries; Diploma in Business Administration manuelabosch.de; vanillaway.net  manuela@vanillaway.net

Marcus Bussey  Cultural transformationalist, Neohumanist and historian/futurist Deputy Head, School of Social Sciences, University of the Sunshine Coast, member of Legacy17 usc.edu.au/staff-repository/dr-marcus-bussey  mbussey@usc.edu.au

Martin Cadée  Trusted partner for leaders, Coach for people moving through big transitions in life or work; Nature Quest Guide, Co-founder KaosPilots NL (now Know-mads) martincadee.com  martin@martincadee.com

Clinton Callahan  Transformational Circle Alchemist, Memetic Engineer, Possibilitator, trainer-trainer, gameworld builder, originator of Possibility Management, author of Conscious Feelings and Building Love That Lasts, from the nanonation of Possiblica, member of Legacy17 possibilitymanagement.org; startover.xyz  clinton@nextculture.org

Nils I. Cornelissen  Transformational business consultant and one of the Partners at RETURN ON MEANING GmbH, a boutique consulting firm focusing on cultural change, talent management, leadership and mindfullness. returnonmeaning.com  nils@returnonmeaning.com

Hadas Fisher-Oren  Dance therapist, Bodywork therapist, Rio Abierto (bodymind) group facilitator, Founder of Transformative Dance and Transformative Dance Facilitators Training transformative-dance.com  hadasfisher@gmail.com

Christian F. Freisleben  Freelancing teacher, facilitator, journalist, improviser, St. Pölten University of Applied Sciences (Didactics of higher education, E-Learning, Teaching & Research) cfreisleben@fhstp.ac.at

Caitlin Frost  Leadership Coach, Trainer and Certified Facilitator of The Work and Participatory Leadership and Dialogue Host and Process Designer, Caitlin Frost Coaching caitlinfrost.ca harvestmoonconsultants.com  caitlin.frost@gmail.com +1 778 997 9254

Diego Galafassi  Transdisciplinary artist from Brazil with a practice grounded at the interface of art, sciences and co-creative processes; director, writer and producer of documentaries, experimental film, new media and participatory performance; Artist in Residence at ISET Johns Hopkins, member of Legacy17 diegogalafassi.live

Robert Gilman  Developer of the Bright Future Network, sustainability thought-leader over four decades, former astrophysicist, member of Legacy17 Context Institute and Bright Future Now — context.org/about/contact

Frauke Godat  Learning Process Designer and Edgewalker between the formal and non-formal education system. Kiel University — perle.uni-kiel.de Art of Hosting — artofhosting.org  frauke.godat@gmail.com
Jasenka Gojšić  Facilitator of transformative learning with experience in telecommunication and management, member of Legacy17
isoropia.hr  jasenka.gojsic@isoropia.hr

Lonny Gold  Master Trainer in learning systems catering to long-term memory and the unconscious mind. Working for Legacy 17 and Freelance
www.lonnygold.com, www.lonnygold.training, lonnygold13@gmail.com

Boris Goldammer  Illustrator, Founder and Head of Visionautik Akademie, Founder and Head of Transformation Hosts International
visionautik.de; hostingtransformation.eu  bg@visionautik.de

Jutta Goldammer  Founder and Head of Visionautik Akademie, organisational developer, education pioneer, facilitator and firewalk instructor. Dedicates her professional life to creating a culture of imagination and cocreation towards a good life for all beings.
visionautik.de  juttagoldammer@visionautik.de

Griet Hellinckx  Teacher, facilitator, trainer, coach and mentor working with children, young people and adults. Currently she is focusing on methods that enable people individually and in community to reconnect to their own Self and wisdom, to one another, and to nature.
re-connect.net  griet.hellinckx@re-connect.net

Manuela Hernández  Collaborative learning facilitator, author and educator
mylightspot.com  manuela@mylightspot.com

Thomas Herrmann  We release lifepower in people, organisations and society.
Member of Legacy17
Open Space Consulting — openspaceconsulting.com
thomas@openspaceconsulting.com  +46 (0)798 989786

Lana Kristine Jelenjev  Community Alchemist and Learning Experience Designer who is passionate about designing transformative learning communities
Dream See Do — dreamseedo.org  lana@dreamseedo.org

Lawrence Kampf  Creator of the Nova Earth Institute, global creativity thought leader, New Leadership Mentor, coach, strategy consultant, artist and planetary healer.
novaearthinstitute.com  lawrence@novaearthinstitute.com

Neža Krek  Career choice mentor for women who want to make a healthy career change that fits who they truly are. Facilitator of transformational learning spaces, facilitation enthusiast, a happy human being
Meaningful Meetings — NezaKrek.com
linkedin.com/in/nezakrek  hello@nezakrek.com

Frans Lenglet  Designing, applying & researching collaborative learning for reaching social justice and economic equity for present and future generations, within planetary boundaries, member of Legacy17
frans lenglet@gmail.com

Floor Martens  International Business Consultant and Coach
floorish.com  floor.martens@floorish.com
Wilmer Meneses  Dreamer and continuous apprentice, exploring various disciplines to connect them to human-centred innovation, believes in transformative learning as a tool to make real a utopian world based on the values of cooperation, empathy and common well-being linkedin.com/in/wilmer-meneses-a415b521 will.meneses@gmail.com

Veronika Mercks  Teach First Germany alumna, founder of Navigaia Journeys (transformational and responsible travelling of people in transition), project manager in educational projects, facilitator and creator of experiential learning spaces navigaia-journeys.org veronika.mercks@navigaia-journeys.org

Irene Nolte  Integrative life coach, Deep Ecology facilitator, EFT trainer and burnout prevention coach irenenolte.com info@irenenolte.com

Dror Noy  Social Innovation & sustainable development expert, Co-Founder of Yumajai and Inside Hub insidehub.com drornoy@gmail.com

Balint Öry  Cognitive scientist, philosopher of the body and movement, person-centred teacher at Rogers Academy Rogers Foundation — rogersalapitvany.hu Rogers Academy — rogersakademia.hu orybalint@gmail.com

Olena Pometun  Professor, researcher on pedagogy aspects of ESD integrated into a secondary school curriculum, author and co-author, Head of Ukrainian NGO Teachers for Democracy and Partnership, member of Legacy17, Teachers for Democracy and Partnership — tdp.org.ua esd.org.ua opometun@gmail.com

Friederike Riemer  aka Frida Futura, a Future Scientist and international facilitator with a focus on collaboration and creativity, the Future Game 2050 thefuturegame2050.com friederike.riemer@thefuturegame2050.com

Elena Rodríguez Blanco  Designing transformational experiences and learning journeys which open up possibilities for creativity, social empowerment and change; social entrepreneur and impact investor elenarodriguezblanco.com elena.rodriguezblanco@gmail.com

Anneke Schaardt  Designing, implementing and researching educational settings that empower individuals, (outdoor) educator, trainer, facilitator, Kiel School of Sustainability sustainability.uni-kiel.de schaardt@geographie.uni-kiel.de yooweedoo.org schaardt@yooweedoo.org

Klaus Schenck  Business & Agile Coach, Systemic Organisational Development Consultant, former Ph.D. molecular biologist and Ex-Manager Focus Five Coaching Solutions — sites.google.com/site/klausschenck doc.ks@web.de +49-173-6696562
Virág Suhajda  Adult educator, trainer, person-centred counsellor, folk tale therapist, soon-to-be psychodynamic dance and movement therapist
Rogers Foundation — rogersalapitvany.hu  virag.suhajda@rogersalapitvany.hu

Zsuzsa Vastag  Psychologist, trainer, working with teachers on emotional education, play and drama
Rogers Foundation — rogersalapitvany.hu  zsuzsa.vastag@rogersalapitvany.hu

Nikolaus von Stillfried  loves to facilitate systemic constellations, creating spaces where organisations, projects and individuals can tap into the intelligence that is alive in their systems to find answers, develop solutions and be inspired
raumzeit.team  nvs@raumzeit.team

Daniel Christian Wahl  Catalyst for global regeneration through social media advocacy, consultancy, education, future visioning, and bioregional regeneration, working as strategic advisor for individuals and organisations.
danielchristianwahl.com
medium.com/@designforsustainability  contact@danielchristianwahl.com

Lina Westermann  Peace worker, Teach First alumna, facilitator
DEEP Deutschland e.V. — globaldeepnetwork.org
l.westermann@globaldeepnetwork.org

Felix M. Wieduwilt  Tech-Philosopher, author, co-founder of The Future Game 2050
thefuturegame2050.com
felix.wieduwilt@thefuturegame2050.com

Olena Zarichna  Trainer for NGO Teachers for Democracy and Partnership, Vice Principal of Ternopil Secondary School #24
tdp.org.ua
school24.te.ua/45-ternopilska-zosh-24  lenyzar1966@gmail.com  +380972280177

Zsuzsa Vastag  Psychologist, trainer, working with teachers on emotional education, play and drama
Rogers Foundation — rogersalapitvany.hu  zsuzsa.vastag@rogersalapitvany.hu

Daniel Christian Wahl  Catalyst for global regeneration through social media advocacy, consultancy, education, future visioning, and bioregional regeneration, working as strategic advisor for individuals and organisations.
danielchristianwahl.com
medium.com/@designforsustainability  contact@danielchristianwahl.com

Lina Westermann  Peace worker, Teach First alumna, facilitator
DEEP Deutschland e.V. — globaldeepnetwork.org
l.westermann@globaldeepnetwork.org

Felix M. Wieduwilt  Tech-Philosopher, author, co-founder of The Future Game 2050
thefuturegame2050.com
felix.wieduwilt@thefuturegame2050.com

Olena Zarichna  Trainer for NGO Teachers for Democracy and Partnership, Vice Principal of Ternopil Secondary School #24
tdp.org.ua
school24.te.ua/45-ternopilska-zosh-24  lenyzar1966@gmail.com  +380972280177
## ANNEXE 4. Index

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Learning</td>
<td>172</td>
</tr>
<tr>
<td>Action Research</td>
<td>116</td>
</tr>
<tr>
<td>A Facilitator may have many Roles</td>
<td>358</td>
</tr>
<tr>
<td>A ‘Learning Organisation’</td>
<td>115</td>
</tr>
<tr>
<td>An Empowerment Spiral</td>
<td>168</td>
</tr>
<tr>
<td>Anticipation and Grace Hacks</td>
<td>88</td>
</tr>
<tr>
<td>Applied Improvisation</td>
<td>346</td>
</tr>
<tr>
<td>Appreciative Inquiry</td>
<td>294</td>
</tr>
<tr>
<td>Backcasting</td>
<td>252</td>
</tr>
<tr>
<td>Beyond a Single Event</td>
<td>148</td>
</tr>
<tr>
<td>Bright Future Now</td>
<td>15</td>
</tr>
<tr>
<td>Building Blocks Give Rhythm</td>
<td>357</td>
</tr>
<tr>
<td>Celebrate</td>
<td>386</td>
</tr>
<tr>
<td>Choose Online or Offline</td>
<td>380</td>
</tr>
<tr>
<td>CLA: Unpacking the World –</td>
<td>84</td>
</tr>
<tr>
<td>Community of Inquiry Online</td>
<td>24</td>
</tr>
<tr>
<td>Community of Practice</td>
<td>206</td>
</tr>
<tr>
<td>Competence Elements or Categories</td>
<td>12</td>
</tr>
<tr>
<td>Complexity &amp; Habits of Mind</td>
<td>316</td>
</tr>
<tr>
<td>Complexity Theory</td>
<td>120</td>
</tr>
<tr>
<td>Creativity and Transformation</td>
<td>210</td>
</tr>
<tr>
<td>Critical Thinking</td>
<td>30</td>
</tr>
<tr>
<td>Deep Listening” and Parking</td>
<td>202</td>
</tr>
<tr>
<td>Define your Vision</td>
<td>364</td>
</tr>
<tr>
<td>Design for Transformation</td>
<td>368</td>
</tr>
<tr>
<td>Designing for Transformation as Storytelling</td>
<td>356</td>
</tr>
<tr>
<td>Designing Regenerative Cultures</td>
<td>140</td>
</tr>
<tr>
<td>Design Thinking</td>
<td>284</td>
</tr>
<tr>
<td>Diffusion of Innovations</td>
<td>94</td>
</tr>
<tr>
<td>Disposition/Orientation</td>
<td>399</td>
</tr>
<tr>
<td>Domain/Content</td>
<td>399</td>
</tr>
<tr>
<td>Emergent Learning</td>
<td>132</td>
</tr>
<tr>
<td>Empowering Facilitation and Coaching</td>
<td>330</td>
</tr>
<tr>
<td>Enspirited Envisioning</td>
<td>270</td>
</tr>
<tr>
<td>Experiences with Competence Frameworks</td>
<td>14</td>
</tr>
<tr>
<td>Flow Theory</td>
<td>152</td>
</tr>
<tr>
<td>Focusing</td>
<td>38</td>
</tr>
<tr>
<td>Forest Bathing</td>
<td>342</td>
</tr>
<tr>
<td>Futures Senses</td>
<td>89</td>
</tr>
<tr>
<td>Gamification</td>
<td>350</td>
</tr>
<tr>
<td>Genuine Contact “</td>
<td>306</td>
</tr>
<tr>
<td>Get to Know your People</td>
<td>365</td>
</tr>
<tr>
<td>Habermas and Transformative Learning</td>
<td>62</td>
</tr>
<tr>
<td>Interpersonal</td>
<td>397</td>
</tr>
<tr>
<td>Invitation</td>
<td>372</td>
</tr>
<tr>
<td>Kissed by the Muse Model</td>
<td>76</td>
</tr>
<tr>
<td>Learning for Change</td>
<td>110</td>
</tr>
<tr>
<td>Life Design</td>
<td>200</td>
</tr>
<tr>
<td>Living Knowledge</td>
<td>302</td>
</tr>
<tr>
<td>Materials and Handouts</td>
<td>370</td>
</tr>
<tr>
<td>Neutrality or Detachment as a Facilitator of TL</td>
<td>360</td>
</tr>
<tr>
<td>Non-Violent Communication</td>
<td>238</td>
</tr>
<tr>
<td>Open Space Technology</td>
<td>230</td>
</tr>
<tr>
<td>Paulo Freire – Emancipatory Learning</td>
<td>160</td>
</tr>
<tr>
<td>Peacebuilding and Non-Violence</td>
<td>124</td>
</tr>
<tr>
<td>Peer-to-Peer Coaching</td>
<td>336</td>
</tr>
<tr>
<td>Personal and Intrapersonal</td>
<td>396</td>
</tr>
<tr>
<td>Positive Deviance</td>
<td>113</td>
</tr>
<tr>
<td>Possibility Management</td>
<td>16</td>
</tr>
<tr>
<td>Prepare Yourself</td>
<td>382</td>
</tr>
<tr>
<td>Process Work</td>
<td>68</td>
</tr>
<tr>
<td>Professional/Pedagogical</td>
<td>398</td>
</tr>
<tr>
<td>Reactive vs. Creative</td>
<td>44</td>
</tr>
<tr>
<td>Rites of Passage</td>
<td>28</td>
</tr>
<tr>
<td>Roger’s Person-Centred Approach</td>
<td>58</td>
</tr>
<tr>
<td>Satir Change Model</td>
<td>266</td>
</tr>
<tr>
<td>Shared Value-Scaling</td>
<td>234</td>
</tr>
<tr>
<td>Social Presencing Theatre</td>
<td>286</td>
</tr>
<tr>
<td>Social, Transformative, and Collaborative Learning</td>
<td>50</td>
</tr>
<tr>
<td>Start with the WHY</td>
<td>362</td>
</tr>
<tr>
<td>Step into your Leadership</td>
<td>363</td>
</tr>
<tr>
<td>Suggestopedia</td>
<td>176</td>
</tr>
<tr>
<td>Support for the Transformation</td>
<td>384</td>
</tr>
<tr>
<td>Symmathesy</td>
<td>98</td>
</tr>
<tr>
<td>Systemic Constellation Work in Organisations</td>
<td>324</td>
</tr>
<tr>
<td>Systems Thinking</td>
<td>102</td>
</tr>
<tr>
<td>The Art of Hosting</td>
<td>227</td>
</tr>
<tr>
<td>The Future Game 2050</td>
<td>244</td>
</tr>
<tr>
<td>The Hero’s Journey</td>
<td>216</td>
</tr>
<tr>
<td>The Oasis Game</td>
<td>260</td>
</tr>
<tr>
<td>Theory U</td>
<td>136</td>
</tr>
<tr>
<td>The Theatre of the Oppressed</td>
<td>290</td>
</tr>
<tr>
<td>The Transformative Learning</td>
<td>142</td>
</tr>
<tr>
<td>The Work</td>
<td>188</td>
</tr>
<tr>
<td>The Work That Reconnects (WTR), Deep Ecology</td>
<td>194</td>
</tr>
<tr>
<td>Three Horizons</td>
<td>248</td>
</tr>
<tr>
<td>Transformation through Embodied Learning</td>
<td>34</td>
</tr>
<tr>
<td>Transformative Dance</td>
<td>276</td>
</tr>
<tr>
<td>Visualisation: Methods and Impact</td>
<td>256</td>
</tr>
<tr>
<td>Warriors of the Heart</td>
<td>127</td>
</tr>
<tr>
<td>World Cafe</td>
<td>224</td>
</tr>
</tbody>
</table>
The kaleidoscope of approaches to foster transformative learning does not end here.

What more is out there?

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