

**SUCCESSFUL SOCIAL CHANGE LEADING AND ITS VALUES:  
DISCOVERY THROUGH COOPERATIVE INQUIRY**

**COOPERATIVE INQUIRY REPORT: GROUP 2**



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**Cooperative Inquiry Group 2, 2003-04,  
Leadership for a Changing World  
Executive Summary (07-30-04)**

**Overview Statement**

This cooperative inquiry into social change leadership traces the development of both a compelling question and its team, as they thoughtfully worked through a unique, extended engagement process, followed by action-oriented research and learning. As the inquiry progressed, the group found and nurtured a deep understanding of the trust and relationship necessary for themselves and others who seek to be social change leaders. Members of the Inquiry modeled that trusting relationship, while engaging in rounds of critical reflection to make sense of their question.

This project received research support and guidance from the Research and Documentation Component of Leadership for a Changing World (LCW), at the Research Center for Leadership in Action, Robert F. Wagner School of Public Service, New York University. Leadership for a Changing World is sponsored by the Ford Foundation.

**Participants:** Eight social change leaders, six of whom are awardees or colleagues in the Leadership for a Changing World (LCW) program and two of whom are CI facilitators.

Members of the inquiry are: Susana Almanza, Mónica Byrne-Jiménez, Michelle de la Uz, Stan Eilert, Theresa Holden, Mary Houghton, Linda Smith and Deborah (Debbie) Warren.

**Inquiry Purpose:** To understand more of the roots and strategies that undergird social change leadership by examining social change successes and the values leaders hold across a diversity of issues and organizations.

**Inquiry Question:** What makes social change leadership successful and what values are held in common across such diverse leaders and organizations?

**Process:** A series of 2-3 day meetings with facilitators skilled in using cooperative inquiry, along with multiple interviews of social change leaders, plus readings, storytelling, and field trips to engage in rounds of actions and reflections about leading social change. Participants met for five times during 16 months (2003-04) with plans to take aspects of the work forward.

**Outcomes:**

1. Expanded definition and delineation of what makes successful and compelling social change leadership.
2. Identification of operating values found in social change leaders.
3. Development of and reflection on trusting relationships available to social change leaders as they engage in work with others, for the common good.
4. Production of a pilot communication project providing multi-media methods for understanding social change leadership, described “whole-istically”, not only through explanation and rational cognition, but also through expression and imagination.
5. An understanding of cooperative inquiry, an extended research approach that helps its members inquire into a compelling question, while also supporting them in learning what they are most interested in knowing.

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*“Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has.”*  
*Margaret Mead, anthropologist*

## **I. INTRODUCTION**

In March 2003, Awardees and Colleagues of the Leadership for a Changing World program gathered to brainstorm their interest for a collaborative inquiry about social change leadership. This was the first step in what would be a journey that spanned sixteen months of intense discussion, reflection, and investigation into leadership. Uniquely, our journey and work received support from New York University’s Wagner School and the Research Center for Leadership in Action, for capturing and analyzing the processes of leader development. That additional support for research demanded analysis and reporting. In serving as a chronicle, this report aids in seeing the experiences found in that collaborative inquiry and more importantly, it helps to see what is often less visible about social change leadership.

As in most journeys, there were unexpected twists and turns, moments of confusion and clarity, and bursts of tears and laughter. Throughout the inquiry, however, the group was driven to understand the essence of social change leadership, for themselves, their communities, and indeed, for the world. In addition we were determined to share our learning with other social change leaders, new leaders, and any one who might be interested in making the world a better place. This report offered us an opportunity to crystallize all we had learned and to share the answers to our question to a larger audience. It also gave us a place in which we could reflect further on our process, our leadership, and our learning. Lastly, as our inquiry has come to an ending, it has helped us to voice new questions and see new directions for each of our journeys.

This report provides a window into our collaborative inquiry, but to do so it is important to recognize two things. The first is the use of voice throughout the report. To honor the relationships that developed as a result of this cooperative inquiry it is important to realize that the use of “we” refers to *all* the members of the group, not just the facilitators. While the facilitators wrote this report it was done with the input, reflections, and support of all the participants. What is shared in this report represents the learning and experience of the entire group. The second is the challenge of capturing a human, or multidimensional, experience within a two-dimensional and linear medium, such as paper. In order to do that the experience itself has to be simplified. One way of combating that is through the use of story in which the reader becomes invested in the characters and, as a result, is able to live their experience. What we present here is our attempt to tell the story of the *people* involved in the inquiry as a way of letting you live their experience.

This report/story is divided into six sections or “chapters.” The first describes how the group “came together” around the question at the heart of our cooperative inquiry. It will share some important background of the people engaged in the inquiry and how we were able to shape a question in which we could create a common experience. The second section shares the answers to our question. True to any human experience, this section also details some of our “unexpected” learning. Section three details the methods we used to investigate our question and that facilitated our learning. The fourth section describes how we attempted to strengthen the validity of our learning and our experience. Section five explains the “Social Change Leadership

and Learning” product, a multi-media compact disc, which was developed throughout the inquiry and helped to ground our work. The final section offers some thoughts for new directions of this, and future, inquiry. In addition, we have added some materials (our agendas, interview questions, etc.) in the appendix to document our sessions.

It is our hope that as our story unfolds, you will get to know us at a deeper level and be able to understand the relationships that grew and were strengthened by this cooperative inquiry and vice-versa. It is these relationships that provided the strength and faith for the group to persevere in its quest to understand leadership to change the world. Enjoy!

## **II. COMING TOGETHER: FORMING OUR INQUIRY GROUP**

**Cooperative Inquiry is a way of research that is not “on” or “for,”  
but is an approach that is truly “with” people.  
Peter Reason (1988)**

In order to understand our inquiry answers, as well as the experience of developing our research and learning, it is important to look at how we approached cooperative inquiry (CI). We believe CI to be a researched, tested method that offered a unique flexibility. Its methodology can support facilitators and members working in small groups or teams. Uniquely CI supports members for working as fully or “whole-istically” with people as possible, drawing from human intellect and capabilities that are not only rational, but also drawing from expression and imagination. As a result of the extended focus for CI, there is deeper need for knowing and working effectively the aspect of “with.”

In this section of our report we introduce each member by telling her or his story of how s/he came to be a leader of social change. We believe that you can better see the important aspect of working “with” that is a part of CI methods, while at the same time, begin to understand how we developed the answers to our question. Not only do the members of our group work in areas of society that need change, we are compelled to do so because of significant and often troubling circumstances, experiences from which we learned and questioned.

### ***KNOWING MORE ABOUT – THE INQUIRERS***

**Susana Almanza, Founder and Chief Executive Officer of People Organized in Defense of Earth and her Resources (PODER), lives and works in Austin Texas, on issues of social and environmental justice for the East Austin communities. In describing what brought her into social change leadership, Susana says, “Both my parents we not formally educated. My parents only spoke Spanish and I could see that they were being treated as second-class citizens. I experienced cultural prejudice, because of the part of town in which I lived. I had to attend segregated schools. I saw firsthand the poverty and the economic inequity. It is the total of all these life experiences at an early age; cultural, educational, social, and economic injustices, that have motivated me to be a community activist.”**

**Mónica Byrne-Jiménez, Educator and Faculty Member, University of Massachusetts.**

**Mónica researched and used cooperative inquiry for understanding the leadership development of principals in urban school systems.** “My story is one connected to education and to educators. And it began when my family was the only family in a wider non-Latino community. At school I was Monica and at home I was *Mónica* and there were two separate worlds. It wasn’t until I got to college that I realized it didn’t have to be that way ... When I was 8 or 9 my father took us to Peru. He wanted to show us everything. We stopped at this little town, which was very poor ... I felt that there was something very wrong. I wanted to say something, but I didn’t yet have the words. As my family became more successful, I continued to go back to that time, as a place of understanding my responsibility.”

**Michelle de la Uz, Executive Director of the Fifth Avenue Committee, New York City. The Fifth Avenue Committee advances economic and social justice in neighborhoods, through affordable housing, organizing local residents and workers for community leadership, creating adult learning and employment, and combating gentrification. Michelle describes her developing commitment to social change by saying,** “What brought me to my work has to do with where my parents came from. My dad immigrated to the USA from Cuba in 1963 as a part of Operation Peter Pan, the largest non-wartime airlift of children out of a country. He met my mom, who is Canadian French, and from a poor family, when he arrived. My parents moved to New London, Connecticut, and I worked in our family’s restaurant, and spoke Spanish with my grandmother, who raised me. New London was one of the first places to have bilingual education. I attended bilingual education there and was the only Cuban in the class; everyone else was Puerto Rican. I was placed into bilingual ed because I would only speak Spanish and my teacher though I was stupid and was going to put me in special education. My parents said ‘place her in bilingual ed instead.’ Later, I was the first in my family to graduate from college. While in college I also worked and ran a teen pregnancy prevention program. College and my work with the teens were transforming experiences. You start to realize the personal power that you have. In creating social change you need to work on multiple levels simultaneously—on individual skills and on creating opportunities and ensuring they are really there for everyone.”

**Stan Eilert, Director of Finances, Colorado Coalition for the Homeless, located in Denver, where Stan works with the charismatic leadership of John Parvensky. One of the major successes of the Coalition is the creation of affordable housing using the closed Lowery Air Base, a 6-year, multi-organization campaign providing over 500 houses with more on the way. Stan traces his role in social change leadership to a story about his father, who was devoutly Catholic.** “There was a woman in a nearby town, whose husband had been killed. She had 5 kids to support and her house became a stopping point for traveling salesmen. Some men in the town were talking and my Dad’s surprising but important comment was, ‘What would you do if you had 5 kids to support?’ There were a number of things like that that I learned from him...by osmosis. Like my dad, I’m here in this work to make the world a better, more humane place.”

**Theresa Holden, Co-Director, Holden & Arts Associates and Color Line Project Director, Junebug Productions, believes that community development is tightly linked to culture and can be accessed using deeper, wider forms of communication, particularly community-based theater and storytelling. (Storytelling Circles are a method employed by Junebug, and Theresa used her skill for storytelling as a leader in the CI project). Her work is grounded in the lessons of the Civil Rights Movement and one of Theresa's stories is about**

**how she moved to her work as a social change leader.** "My work has been centered for a long time around racism and oppression. I believe some of my interest in this work came from living in a small Texas rural town. I was very close to my grandparents; they helped to raise me and I thought they hung the moon, but they struggled with the racism that divided their town and how that was in conflict with their own personal beliefs in the equality of all human beings. But this was the fifties in a small, southern town. My grandfather had a good friend, a man he worked with on his ranch; he was a Mexican. I watched them laugh and talk in both languages. Their friendship was vibrant in the country, but something separated them in town. My grandmother was a great cook and loved to bake. She cooked often in her kitchen with a wonderful black woman; another great cook. The woman's little girl and I played while they baked and laughed and talked. One summer the little girl told me all about a revival tent that was coming to town and invited me to go with her; it sounded like so much more fun than my church experience! When I asked my grandmother, I was told "no," I couldn't go to "their" church. What was this that divided such good friends, why couldn't my strong grandparents "fix" these problems?"

**Mary Houghton, Finance Director, Co-Director, Burlington Community Land Trust, Burlington Vermont, which supports families of modest means in achieving home ownership, while also promoting community preservation. Mary understands the learning through her family about social justice and fairness.** "My family came out of the Puritan migration to Massachusetts. Growing up, one of the ideas, that I never lost, was when I looked at some things, I would say, "that's not fair!" That notion of fair comes out of my family's Puritan tradition. I later coupled that principle with really enjoying being out in nature. I remember driving up the Taconic Parkway, looking around and seeing the woods, which were so beautiful. It hit me: How can people own land! It doesn't make sense and its availability is organized unfairly. The Trust is a place for work where the ideas, purpose and philosophy we have for helping provide access to land is very integrated into the way we work. We know who we are."

**Linda Smith, researcher and teacher of collaborative inquiry, uses the method to access and bring forward knowledge for leadership not yet formally included or recognized, especially the development of women leaders. Linda often uses experience-centered storytelling methods to bring forward informal knowledge. Linda's story of understanding her work is one of honoring and respecting differences.** "My work in social change centers on how do we get it done and how do we know what we have done. I come at my work from a different view, asking questions, hoping to get the "how" of the work, or the process, or the strategy right, so that there is a deep sense of relationship or team. What's possible for change, and how do we get there, working together? How do we understand and learn, so that we can do more? This all started when I was a kid. My father was a union organizer, in a difficult place to organize unions, Appalachia. There is a history of violence and death. I would go with Daddy to the Union Hall, where I would hear them talk about better work, and a better life--and on the way home, I can still hear him say, "You just take the work one step at a time, and you really listen for when you can work with people."

**Debbie Warren, President and CEO of the Regional AIDS Interfaith Network in Charlotte North Carolina engages faith communities in responding to and serving people with HIV-AIDs, and in providing preventative education. Debbie tells a story of weaving together a situation for using strength in social change.** "I grew up with an alcoholic father. My mother was very busy trying to keep it all together. I had this experience of being alone. Then my faith

community became a great resource. From learning and studying the sacred text and stories, I could see the need for social justice. As a lesbian growing up in the South, I also have a sensitivity to others who feel that they may be judged. I remember being so scared of AIDS. But I found this wonderful gay man who became a friend... All of these things became a springboard.”

#### *INDIVIDUAL MEMBER GOALS FOR OUR GROUP*

To know more of who we are, we named individual goals. Individually, we said,

I want to do my work without impediment

I want to do my work while not allowing bureaucracy to get in the way

I want stimulation to view my work, give greater understanding to my leadership, and bring tools to use

I want to share, to see different ways, to explore situations and structures that can help me consider options

I want to recognize tension of different views as a place to find leadership

These goals served to aid in communicating what each of us wanted from the work and for anchoring our group effort. We used these goals to support our inquiry by reviewing them at the start of our weekend sessions.

#### *DEFINING THE ROLE OF THE FACILITATORS*

The role of the facilitators in cooperative inquiry is a complex one in which they have to be able to both support and participate in the inquiry. This is done in the following ways,

1. Fostering effective communication, internally and externally.
2. Building flexibility for planning that supports the changing needs of the inquiry.
3. Developing relationships that are ongoing and meaningful within the group.
4. Supporting a reflective process for each member, as s/he chooses to use it.

In addition, the facilitators must build their own relationship so as to strengthen the inquiry and the individual members. The success of the inquiry, in many ways, relies on the skills and knowledge that all the participants bring to the inquiry. It is the facilitators who draw out, and on, these life experiences to guide the inquiry and meet the needs of individual members.

### **III. DEFINING THE QUESTION: FINDING OUR PLACE OF INQUIRY**

Along with getting to know ourselves and our inquiry method, our first task was to identify an inquiry question. In searching for our question, we had several rounds of exploration in our first two meetings. From the first brainstorm, our interests in an inquiry topic began to emerge. That topic was a better understanding for the communication of social change leadership. It seemed to resonate as a practical strategy while suggesting a deeper area for exploring effective leading and philosophical beliefs. But development of our inquiry question needed more work.



At this point of in our project, the overall emergent, flexible methodology of cooperative inquiry provided specific aid. CI offers an extended epistemology for research and learning (Bray, Lee, Smith and Yorks, 2000; for more information on the principles of cooperative inquiry see the Appendix). The additional attention to relationship of not only people to people, but also people to ideas and compelling issues supports. This extended approach suggests opportunity for addressing multiple issues of diversity-- not only diversity of race or ethnic background, but also different ways of thinking and experience. It offers a method for using and testing practical insights coupled with imagination and exploration. In our group, we wanted to spend our time not only problem solving and innovating ideas, but we also wanted to find answers that supported us individually, in practical and strategic ways. The extended methodology framework of CI helped our group to see our authority for finding the question that fit.

In our first session, we focused our attention on the big idea of social change communication. Re-examining our topic and our interests in our second session, we shifted our attention to exploring success and important values that distinguish social change leaders. Stepping back, reflecting, and using multiple examples of successful leadership, helped us take apart that success to see when and where communication was intertwined. Social change leadership is also value-driven. Presenting our values well is part of the skill and the art of social change leading. As such the emphasis on values intertwines with understanding aspects of communication strategies required for social change leaders.

At this point of in our project, the group began to feel some tension between the need to define our question in a way that allowed participants to engage in the inquiry and the desire to start “doing something.” As social change leaders in the midst of our own work, time was a premium and the pressure to start *doing* was powerful. The overall emergent, flexible methodology of cooperative inquiry (CI) provided specific aid for several reasons. Firstly, CI offers an extended epistemology for research and learning (Bray, Lee, Smith and Yorks, 2000; for more information on the principles of cooperative inquiry see the Appendix). The equal value placed on acting and reflecting, and symbiotic relationship between the two, comforted members of the inquiry and helped them to understand that learning *is* doing. Secondly, the additional attention to relationship of not only people to people, but also people to ideas and compelling issues is central to the inquiry itself and supports those engaged in it. Thirdly, this extended approach suggests opportunity for addressing multiple issues of diversity-- not only diversity of race or ethnic background, but also different ways of thinking and experience. The multiple ways of knowing, inherent in the extended epistemology, provide for members to express themselves and make sense of the experience in a variety of ways.

In our first session, we focused our attention on the big idea of social change communication. Re-examining our topic and our interests in our second session, the question arose “communicate *what?*” As a result, we shifted our attention to exploring success and important values that distinguish social change leaders and which help them to articulate a clear message and vision. Stepping back, reflecting, and using multiple examples of successful leadership, helped us take apart that success to see when and where communication was intertwined. We also knew from our collective experiences that social change leadership is also value-driven. Presenting our values well is part of the skill and the art of social change leading. As such the emphasis on values intertwines with understanding aspects of communication strategies required for social change leaders. So even as the question focused on the underlying values of social change

leaders and their successes, for us it was still intricately linked to our initial interest in communication.

After rounds of thinking about social change leadership we framed our question this way:

**What makes social change leadership compelling and successful and what are the values held in common by such diverse leaders and their organizations?**

We believed that finding answers and learning through this inquiry question is both foundational and practical for the art and strategy of effective leadership. These answers aid with important communication of that leading.

Leader communication is an important, but an often under-described skill for leading. Theorists Robert Mai and Alan Akerson (2003) conclude that every leader has three challenges: 1) building a sense of community among those s/he seeks to lead; 2) keeping focused through conflict and change; 3) sparking the creativity necessary to support commitment to vision. The leadership competency most crucial to meeting those challenges is communication. Nelson Mandela, one of the most compelling social change leaders of our time, notes the need for communication. He emphasizes the use of stories and storytelling, as an approach to inspire and encourage people in building a better world. Informally, we acted on this wisdom using interview stories to understand and communicate about social change leadership.

## **V. ANSWERS TO OUR INQUIRY QUESTION: NAMING THE VALUES & SUCCESSES OF SOCIAL CHANGE LEADERSHIP**

This section of our report outlines our answers, which are gathered from our interviews and are grounded in rounds of our group's reflections. The answers to our question are dynamic, overlapping, and interlinked, like a tapestry. These answers center on big ideas for a better society, as well as around a developing theme of relationship and trust that became apparent as we explored social change leadership. We weave the major theme of relationship into other answers, which included the roles for leader as both bridge-builder/conduit and educator, as well as the needed skill for developing/applying our big ideas as visions.

As part of answering our inquiry question, we also identified important values that appear among many social change leaders. These values focus on a deep desire to make the world more humane and offer much hope for inclusion/expanded participation. We begin this section with a discussion of these values since we believe they lay the foundation for any social change leadership success. In our exploration of social change leadership, we found the following to be roots of successful and compelling social change leadership: "we-ness" and bridge building, and the nature of vision. In addition, we also include the *unexpected* learning that was gathered as a result of our inquiry.

### *VALUES OPERATING WITHIN SOCIAL CHANGE LEADERSHIP*

It is accepted that leadership is value-driven, yet we wanted to find out what values "in action" make social change leadership successful. Examining the underlying values of leadership success, therefore, supports our inquiry into distinguishing and recognizing social change leadership. Learning more about the values held in common across different leaders and organizations brings to light the values we hold and other we want to expand. Articulating our values with clarity and conviction are part of the skill and the art of strategic communication,

and, as such, supports the work of social change leaders, both present and future. The following values were identified as being essential to successful and compelling social change leadership: trust, respect for human dignity, spirituality, and empowerment through education.

- *Respect for Human Dignity*

One of the reoccurring themes that came out strongly in all our work, interviews, stories, and discussions is the idea of respect for the humanity in all of the communities we serve. This was so prevalent that we began to realize that it was central to social change leadership.

Social change leadership is based on the basic tenet of the dignity of all humans. That is a basic right. The expectation is a responsibility ... the basic idea is to leave the world a better place – Stan

Social change leadership is a complete acceptance and suspension of judgment about people and their circumstance - Theresa

This core value allows us to “meet people where they are” regardless of situation. And because of this we are able to listen carefully and engage fully in the lives and needs of the community and to shape our work accordingly.

Because you are so grounded in the community that you are a part of and are aware ... you are able to recognize the work - Michelle

You want to be caring, and out of that caring you learn more and can talk more - Debbie

Finally, this close connection with others and this respect for human dignity allows us to focus on “the right thing,” fairness, and creating – and protecting – human relationships. It is also this belief that we are connected in some way that makes us unable to stand idly by when we see injustice taking place.

- *Spirituality*

Closely related to the value of human dignity is the idea of spirit and human connectedness. We found that in our work many of us rely on spirituality and faith as a way to strengthen our resolve in leading for social change. The use of these terms does not imply a religious doctrine, per se, but rather a search for understanding each other,

I am wondering if there’s one big thing that links all of us - Theresa

From this search for and belief in humanity we see implications for our leadership,

What happens when the oppressed, the marginalized, invite the Divine in, plug into their own divinity, to rise above. And these are the same people who were once kept out. That has been powerful – Community Leader

Truly have a belief and faith in all human beings and working from that value, of having community and connections – Mary

She talks a lot about doing what you do, doing that well, that the imperative comes out of our spirits – Stan

The sense of family, with wisdom and harmony with everyone... we are a part of a bigger thing, we are a part of the universe, we are a part of Mother Earth and what she gives to us and we have a need to keep a balance with that. When we do things, we need to know why we do them– and we do them from our spirit, which is helping us keep a balance. We need to realize that it is not just this little community, but part of the larger community. We are all brothers and sisters... and the sun is our father, the earth our mother, and justice is our guide, and I define that in one big term– our spirituality. - Susana

Through this belief in the spirit, the humanity, inside all of us we are able to reach into ourselves and reach out to others to form bonds, build relationships, and strengthen communities.

- *Empowerment through Education*

Another theme that appeared in all of our stories and work was the importance of empowering communities. The focus of social change leaders is less on giving them power, but more on giving them the tools with which to claim power. One of the central roles for social change leading is being an educator for action. As a result much of our work centered on educating communities, other organizations, and policy makers.

Dissecting the issue, breaking it down to the grassroots level, explaining various outcomes for each scenario, so that community residents can make an informed decision. It takes a lot of work, a lot of education, and time to do that. – Susana

We kept coming together to get information, form strategy using the experts. Then we'd go back out into our neighborhoods, with the experts coming out to help in those communities, to explain, to provide information – Michelle

Keeping the revolution in sight while working on reform that are in the system ... education at multiple levels – Mary

[The leader] understands the opportunities for teaching is that those with leadership roles have to be able to allow for the creativity of others that are a part of the work - Theresa

This emphasis on education, sharing of information and strategies, and providing a “seat at the table” gives voice to those who were previously silent. What is also interesting is that as others in the community, and within our organizations, find their “leadership voice” we are required to find a new voice for ourselves, either by finding new conduits/bridges with other organizations, as suggested in the previous section, or by looking for new ways to develop ourselves and our leadership. As we discussed several times in our inquiry, we would all love to “work ourselves out of a job.”

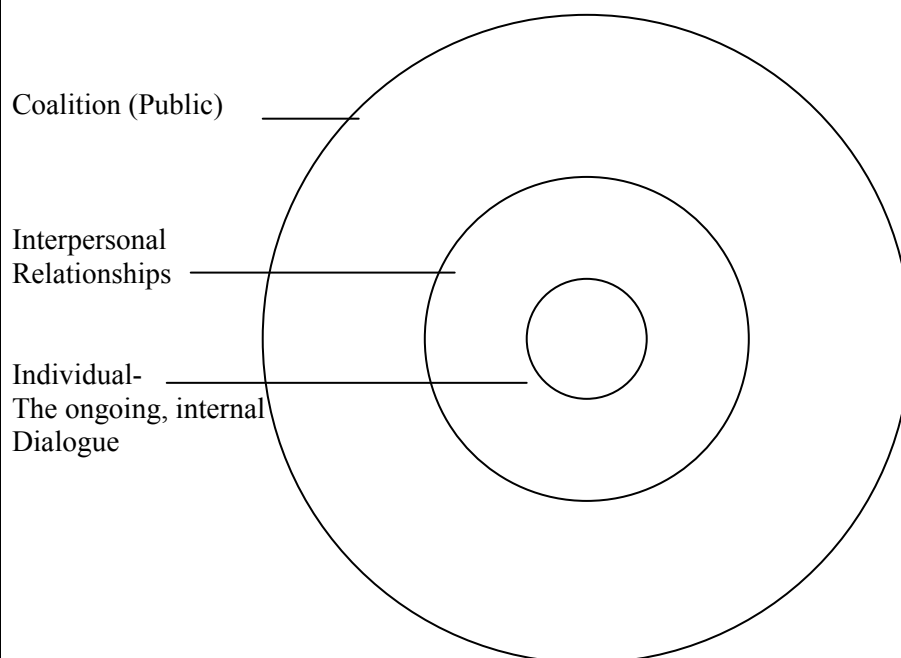
## *SUCCESS USING “WE-NESS” AND BRIDGE-BUILDING*

As a result of our cooperative inquiry, we defined a dynamic we named “we-ness”. We-ness focuses on pursuing the collective good instead of, or in some cases along with, the individual or private interest. In coming to know what sets apart social change leadership success, our group carefully distinguishes ourselves as social change leaders who differ from other types of leaders in our society. In contrast, other leaders pursue their goals in benefit for themselves and/or a relatively small group of shareholders.

Attaining and working with the dynamic of the collective good, or “we-ness” was one of the important answers to our question. It requires an expanded, overlapping role for relationship and trust. Through our inquiry reflections, we described the relationship factor, “we-ness” as the social change leader(s) identifying, knowing, and then working with relationships more widely, more deeply, and very skillfully in benefit of common, society-focused results.

Although overlapping in reality, the multiple levels of “we-ness” can be constructed using concentric circles. The outermost circle is the relationship often found in social change coalitions that aid in getting many tasks done for an issue campaign or a project. In between the outer and the inner circle is an area of trusting relationship which bridges or serves as a conduit. In the center of “we-ness” is a deeper form of self-knowledge that respects and uses personal experiences in a compelling, authentic way.

### *Levels of We-ness*



- *We-ness at the Public Level: Creating Coalitions*

In an interview within our inquiry group, Mary tells the story of developing extended relationships for the Burlington Community Land Trust. This interview illustrates the “we-ness” aspect of social change leadership at the external coalition or community level.

We work hard to broaden our base. When we started, it was a core group of progressives. But because we do home ownership, the middle class could “get it” [because] they understand and value home ownership...the teachers, the firemen, the police—[because they] often can’t afford to live in the same town that they work

Part of that mission is neighborhood development. So other nonprofits have gotten to know us. We’ve also made friends, with the moderate Republicans, who live in Vermont... and we apply that relationship. For example, we get the letter signed by someone notable like the local president of the bank and we’ve also had the widow of the former governor—she wrote and signed her letter this has been very productive. We also look for every opportunity to communicate publicly about every project. - Mary

- *We-ness at Mid-level: Interpersonal Relationship Building*

“We-ness” found in change projects often requires the social change leader be a bridge or conduit across diverse people and settings. This success level moves beyond the public relationships to engage the leader(s) to their work and to working with others at a more complex interpersonal level. It requires a skilled understanding of what must be communicated for extended, people-center activity. It includes behaviors such as repeated rounds of communication, often focused on problem solving on an issue important to all. And this level of “we-ness” uses respect to build, then, use trust for the ongoing work of leading.

The dynamics of this “we-ness” level may appear as a back and forth movement, without clear delineation of positional leadership. It can be seen in an example of Theresa’s, in which she explained developing a process for communication from and with people of the community,

A few years ago, - an organization invited Junebug Productions and Roadside Theater - to do a project in their community, which has a population of about 40% Appalachian and 40% African American people.

The city was getting ready to host the National Folklife Festival. They wanted not only to be the site but to have a product to offer. The city wanted to look at its history and its story. So, our job was to collect stories about the different racial groups that make up the history of the city and to help turn those into various performance pieces.

And I was the organizer, representative, conduit, and bridge to the hosting organization for our companies.

In hindsight, what should have been a bit of a red flag, was that the City office and this nonprofit [spearheading the effort] had found one to two groups to represent the wider community. They had also come up with a plan for how we could get the stories and how long it would take. When working on a truly grass-roots project, which is respectful of the whole community, the minute you think

you are going to get from point one to point seven in a certain number of months, it will probably take two times that, and that's what happened! We kept backing up and coming to the planning table about how we could seriously get enough African American stories, or enough Appalachian stories, and then we found that there was significant Polish and German communities, and a Jewish community who wanted their stories included. We kept saying to the host, "You need the whole picture, we need more time." And as a result, we had this three-steps forward-four-steps-back movement going. - Theresa

In continuing to tell the story of this project, Theresa brings forward more description about the bridge building that shapes this second level of "we-ness". She identified and communicated with the people in the story-telling circles so that they could feel that their stories mattered and the leaders wanted to listen. Then, her story presented the problem for development and leadership: "*the minute you think you are going to get from point one to point seven...it will take two times that...*" This situation required additional rounds of communication, building of relationship and trust for continuing the work, so that those who were overseeing the project, could understand the problems, the solutions, and a wider community-focused inclusion.

We were really saying this is community project, and that was what the mission statement for the project said! We made a few inroads and got some more story circles going. What happened was that the true story of the city started emerging...However, the dilemma of racial tension among the cultures also began to emerge. All of this needed more time to work its way out, so that it could become a positive project. Well, that couldn't work, until the stories "sat" inside each community, became owned by each culture, then the stories could move out and become "the whole city's story". In the long run the community won. - Theresa

The interpersonal, mid-level "we-ness" also addresses the need for social change leaders to help all to find a voice. That effort is in the story told by Theresa,

We kept backing up and coming to the planning table about how we could seriously get enough African American stories, ... Appalachian stories, [stories from] Polish and German communities, and a Jewish community.... We kept saying "You need the whole picture. - Theresa

Later, Theresa says, "the leadership is about laying out ways for others to find their ways into leading."

This level of "we-ness" can be seen as a bridge building role for leading, which emerges and becomes visible to address differences. Susana describes this level in a complementary way by observing that the leader "is really good in talking with others, listening to them and then making connections. She [the leader] talks about making decisions from a wider, collective view, so that there is wider, stronger ownership." A marker of the need for this emergent, bridge-building, relating role is that the timetables and schedules do not fit expectations.

In the wider world of change leadership theory, John Kotter and Dan Cohen, (2002) recognized researchers and business teachers, emphasizes a similar leader role for communication and

building relationships. From researching multiple business transformations, he proposes that in order to make change happen in organizational systems, leaders must empower those around them not only to work from rationality, but also from a deeper place of trusting relationship, to motivate others in overcoming often daunting obstacles. Leaders, then, have extended responsibilities for building trust in order to build the power of others and achieve transformational goals. This theory supports what we have observed about the second level of “we-ness”. In order to include and empower, the social change leader, like the business leader, uses highly effective communication, often sparked by unexpected problems that get in the way of strategy. In the process of solving the problems so that all can move forward effectively, there is the need for extended relationship. However, the level of relationship or “we-ness” takes on an expanded dynamic within social change because the organizational system itself has fewer resources for capital and marketing. Equally important, the leader of social change and his/her followers are not like the business sector, which, see their goals in terms of objective growth and profits. Those leading social change are motivated to make the world a better place, a subjective value-driven stance for leadership.

- *We-ness at the Personal Level: An Ongoing Internal Dialogue*

“We-ness” also has a deeper level of relationship and trust dynamics that is often not described, but is a resource that can distinguish social change leadership. This we-ness is a deeper form of self-knowledge and relationship with self, derived from significant experience that deeply motivates the leader. It is a process of inner dialogue that helps the leader know a) what is it that I can do to change society, which are aspects of personality and spirit; and, b) what do my experiences help me to see and know for others to live humanely, and for the world to be a better place, elements of knowing clearly how we are situated in social schema. Theresa described the importance of this ongoing dialogue as being true to herself, “Self-examination is important... How you come into the work, how you do the work, how you avoid being burned out, continuing to know your strengths, as well as what you can and cannot do...if we do not examine, then we are not going to be effective.”

Susana in telling the story of Janie, a neighborhood organizer in East Austin, describes this deeper, more internal aspect.

Janie came out of the work on the tank farm, being used as a landfill without safeguards for children and families. Her grandson had lead poisoning, and that’s how we began to work with her.

She is a leader. She had that passion. A lot are timid and scared. And Janie’s passion seems to help her speak out. She knows how to convey the problems and how to listen in the community, and because she is also of the community, is a mother and a grandmother, she makes those connections to other parents and grandparents. - Susana

The naming of personal experience and then acting on related social change appears over and over in our stories of success. Janie’s work probably has its roots in that heartbreaking personal experience for her grandson and her family, who lived very near a poisonous tank farm. Implicitly Susana connects Janie’s work to the illness of her grandson at the beginning of her story about Janie’s leadership. From this example and others, it appears successful leaders have



a particular capacity to transform their experiences into personal power for achieving social change.

These deep, personal experiences can be tapped to find ways for communicating about difficult topics and taking important risks. Debbie's story of taking the problem of AIDS back into conservative church communities helps to describe the personal risk-taking which is a part of the "we-ness" of social change leadership.

In the Deep South it is really difficult to talk about sexuality, HIV protection modes. And it is particularly difficult to talk in terms of male-to-male sexual contact. There are homosexuals who feel that they cannot live an authentic life. The pressures are so great. How do you talk about all that? Especially in a conservative area of the country and the faith-based place, where we do our work—So Carl wrote a play. This was a part of the Black Church Week of Prayer for Healing of HIV AIDS performed in a packed house of this church, with 15-20 Black church ministers. We are sitting in this sanctuary. The play unfolds. The lead character talks about going to the pastor, describing his feelings. The pastor tells him he has to deny these feelings. He gets married. Then the woman talks about how she has suspicions about her husband. They start having babies. He has sex with another man, becomes HIV infected, and then she talks about when she learns that she is HIV infected. - Debbie

Debbie's story, like Janie's, has a deeper, personal level. Debbie's sensitivity to the risk taking in her story comes from her own experience and her inner conversation for understanding what it takes to come forward and talk about being a homosexual. This personal level echoes in being aware, knowledgeable of the tension and risk of creating a truly meaningful dialogue among the ministers and the community. This internal level of "we-ness" sets up authority for respecting, not judging, when working with the personal experiences of others. It also authentically supports the use and trust of self to see the way for change, and these ideas come forward as Debbie continues with the story of the AIDS play in the sanctuary this way,

Sitting there, we were nervous wrecks—thinking about what was unfolding. I think all of that contributed to how can we approach the subject in a way that is really thoughtful—not the traditional sermon, a national speaker. But how can we do something that makes something happen—that breaks the ice. - Debbie

Repeatedly in our inquiry sessions, members made references to who we are and how we are shaped by our own significant experiences that are found on the margins of society. These experiences include language differences, unusual family backgrounds, and awareness of homosexuality or class discrimination. In every story told about social change leadership – ours and those we interviewed for our inquiry – the leaders tell stories of being on the social margins. Those stories provide a well of ideas for making social change happen.

We also talked about the need to understand and somehow hold all the multiple layers of relationship, or "we-ness" and the trust needed to do so. We said that an aspect of trusting relationship helps us to see past experience and its problems as a place to plan for the future. Curtis, one of our interviewees, symbolized this past-future relationship for us. We noted his interesting choice of words and talking about the past in the present, and concluded that this

linking was a “subconscious kind of communication genius that helped us to make sense.” As a result of thinking more about past-future links we could see that the “we-ness” of social change leadership “in some way embodies the bottom, the sharecroppers, the grassroots, the people who knock on doors, all those who have gone before us, and the need to add that knowledge to what we want to happen, or change.” Self-knowledge, our experiences, our settings, our stories, and those we work with, then fold into and shape successful work. They become parts of the “we-ness” that is an important factor for social change leading.

*VISION IS CONCRETE AND MEETS PEOPLE RIGHT WHERE THEY ARE:*

Vision is a well-recognized component for social change leadership. In our inquiry work, we used the term frequently in our rounds of group reflections. We also named vision ideas in our more informal gatherings, such as dinner, or a field trip.

Social change leaders make their visions concrete by adding detailed description. It is a primary path for inclusion of others, (focusing on the “we-ness”) and working for the collective good in our communities. These bigger ideas frequently include added, detailed description about budget information, schedules and dates, or specific information about laws. For example, when Stan talks about the work of the Colorado Coalition, his description includes statistics and details about number and types of housing. When Mary speaks about the Community Land Trust she includes information about policy rules that shape funding resources. And Susana describes significant public hearings and the work of community people talking about issues in compelling, visual ways. It appears that we use the details for describing vision to anchor and communicate more concretely our big ideas.

The effort to add concrete description enables others access to big ideas of our visions. We spoke often of the need to include, for helping others participate. When asked to reflect and then delineate the characteristics of social change leaders, members of our group offered ideas for describing the role of participation,

Encourage each and every person to participate fully in seeking justice, freedom.–  
Theresa.

The expectation of “participation” in the solution [Responsibilities] and proposes roles that expand inclusion, such as teaching, facilitating and negotiating. – Stan

...Being clear about vision with a focus on open process, educating, informing to include.  
– Michelle

In our inquiry sessions, we also named the importance of the big idea in determining our vision. Often the description was linked to operating values. These inquiry answers help you as a reader to see the overlapping, interconnected-ness of our answers.

In our group reflection we characterized vision within social change leadership as:

Social change leaders have vision that is more than mission, and more than a statement describing vision.

Social change leaders have vision that includes passion and compassion.

While private sector leaders have a passion for the game or for the strategy, they do not appear to have a compassion for all who are included; in contrast compassion is a part of social change leadership.

The passion and compassion of a successful social change leader also has a greater-than-self factor.

The vision is about a collective good vs. self-interest, including myself as a part of the collective.

Social change vision is based on the basic tenet of the dignity of all humans... it is including the idea that leaders will strive to meet all that they work with, right where they are.

This deeper understanding of the relationship between vision and social change leadership was meaningful both in that it helped to solidify our thinking but also it provided the necessary language for us to begin to articulate our vision and frame our work.

- *Vision Uses the “3<sup>rd</sup> Thing”*

One of the interesting characterizations for successfully leading with vision in social change was what Debbie names “the 3<sup>rd</sup> thing”. She notes that social change leaders are faced with wider and deeper diversity, of not only people and their experiences, but also of ideas and places and organizations. In reviewing one of the community leader interviews, she sees a similar process. “I see in Linda’s story, the idea we have at RAIN, and that is the leader is always bringing together people from diverse ideas, places, but what brings us together is what we call the 3<sup>rd</sup> thing... For Linda, it is quality education; for us at RAIN it’s AIDS.” In examining the 3<sup>rd</sup> Thing, we concluded that it is a phenomenon deeper than organizational mission, or a typical vision statement. The 3<sup>rd</sup> thing is issue driven and it includes a passion and compassion built upon “an underlying love that supports leading through impossible odds.” And as Stan helped the group to see, staying with the vision “so that you leave the world a better place.”

Informally we used the idea of the 3<sup>rd</sup> Thing part of our inquiry actions. Early on, an important dynamic for our inquiry group was the different views that we brought to our topic, while also holding a commitment for working well and respectfully with each other. At the same time, we also wanted to use our time and talents strategically and practically, while engaging in CI. These dynamics supported us in quickly and firmly developing a plan for a product to describe and communicate social change leadership. The development of the product, a communication tool, functioned as our inquiry’s 3<sup>rd</sup> thing. Activities and plans for the product, which evolved into a multi-media compact disk (CD) of leader interviews, supported us and helped us have a focus. Thinking, planning and reflecting on interviews as part of our product, then helped us share new and important stories of our leadership and engage in wider and deeper reflections.

## *UNEXPECTED LEARNING*

One of the most striking messages from our round of story telling and all the interviews was the realization that social change leaders come from a long line of people interested in social justice and the improvement of the human condition. Within many of our families is a heritage of helping others,

A strong desire to do good for others ... we call that a mitzvah – Randall,  
Community Leader

I do it based on my family and my experiences and the communities I identify  
with - Michelle

There were a number of things that I learned from him ... to make the world a  
better, more humane place – Stan

He would talk, teach me about the need for working together ... you do all of  
what you can see that you can do – Linda

Growing up one of the ideas that I got and that I never lost, was when I looked at  
some things, I would say “that’s not fair” ... that important notion of fair coming  
out of my family - Mary

In many ways it seems as if social change leaders are born into strong traditions of justice and equality. These family experiences make us more open and sensitive to the needs of others, along with the expectation of taking some action, no matter how small. So much so that for all of us, the cost of *not* doing something (in terms of our own sense of self and integrity) far outweighs the cost of doing something.

In addition to these personal histories, we also came to see that our leadership, our “cause,” is part of a larger social history or social justice story.

These [social change leaders] had stories and they would connect us to our history  
... we saw in the way they talked that there was a movement. That there had  
always been a movement and that if you want, you can join it. – Curtis,  
Community Leader

Jesus always led with a deep understanding of the human condition, an embracing  
of who we are. He just met people right where they were, and once there is this  
relationship with God, people are on the other side. There is no longer this  
myopic, tunneled view – Community Leader

That’s a special quality that I see that the women of the community have. They  
transcend all these generations and have special qualities to relate – Susana

More of the things that are necessary ... the importance of community,  
connections, and history - Mary

This realization of social justice movements as a “river” or as a flow of people allowed us to see that we were a part of something “bigger than ourselves.” This image gave us a deeper understanding and appreciation of our work, but also allowed us to see how leadership can occur at all levels, and in multiple ways,

I function under the assumption that every man, woman, boy, and girl that comes into our church, God intends to use in some leadership capacity – Community Leader

The main issue in activism is not always standing in front of a bull dozer ... find a way to work with the system to use the power within the system and [your] own power of persuasion and good sense of how to make these projects work for everyone – Stan

I am far from being the person who gets up to and leads the charge, but providing the infrastructure ... is just as important - Mary

In many ways this knowledge serves to bolster our spirits and strengthen our resolve to continue our work.

Another unexpected learning occurred around the importance of knowing and protecting oneself as a human being. Unlike our notion of “we-ness” in which knowledge of self is at the heart of leading organizations, this deeper level of awareness has more to do with perseverance and renewal of spirit, direction, and work.

The thing I’ve grown to understand is we serve best when we are closest to our core truth ... it’s about doing what you do and doing that well. Then the purity and integrity that we can bring, that is our spirit, is when we do our best work – Community Leader

I have believed in service to others. If you don’t do anything, the unexamined life isn’t worth living – Randall

Something we haven’t discussed [is] having a sense of who you are – being the calm in the center of the storm – the personal development piece - Debbie

I hope that I align myself and the work I do with the purpose of those that I work for. – Theresa

This also was important to ensuring that our work and the purpose of our work remained the same,

I sat and was prayerful and then understood that they [members of organization] are a part of me and I was pushing too hard ... so I talked with them last night about making sure that the main things stay the main things – Community Leader

We were really about saying this is a community project ... that's what the mission of the project said ... and yet it was not being played out in the plan -  
Theresa

We found that through this process of “getting our heads up” we were able to identify places in which we can lose sight of the reason for our work. It also reminded us that our leadership has to ensure that the “main thing stays the main thing.”

The last piece of important learning came about understanding the “costs” of social change leadership. All of the information we gathered suggested that even though there was tremendous strength in social change leadership, there was also vulnerability,

The struggle is like that. We are dealing with impossible odds, but the key is take a bite and don't let go. Stay with it – Curtis

There is a temptation to venture into areas where we think the resources are going to be, to do things in ways that we think will be pleasing to funders. And there you are chipping away, until you are in this non-virtuous place, and not be doing the thing you are truly called to do – Community Leader

It seems as if our greatest strength can be our greatest weakness – Mónica

We decided we had to be strong with the parent leadership ...and it was a difficult thing. The people paying us were the parent leadership. Money always plays in to these stories – Theresa

[It] goes back to relationship ... getting there depended on others building relationship ... recognizing genuine interest and finding common ground ... that's hard - Mary

Everything circles back to [building relationships] and how much time it takes to go out and be with people – resonating/reminding to extend the call for action ... need to go back and reconnect with people ... [being] mindful about relationships, making assumptions about those relationships. Assuming others are coming along as organization grows, but maybe not – Debbie

Without an awareness of where potential vulnerabilities in our leadership lie, then it is easier to lose our way.

Through these answers to our inquiry question, we were able to walk away with a deeper knowledge of what social change leadership *is* and what the core values are that make this kind of leadership different from others. And while we accept the fact that we often rely on business/for profit leadership strategies in our work, we also began to recognize that that the business sector has much to learn from us. Additionally, we were able to pinpoint what makes social change leadership successful and begin to see its application to the work we had done and work we were going to begin. Once we were able to see ourselves in the role of bridge builders or conduits, as visionaries, and as people in need of personal – and spiritual – support, we were then able to begin to define our leadership and look to others for help. All of this, we believe,

will help us to develop our communication further, which was our original intent. Lastly, and perhaps most important, we are left with a stronger sense of who we are as individuals, as social change leaders, and as members of a wider, human community.

## **V. HOW WE DID OUR INQUIRY**

Gaining access to our approach is intertwined with our answers and our relationships. For this reason we weave in ideas and themes found in other areas of this report, and we encourage you to explore this section in your mind like a series of overlapping circles.

From the beginning of our inquiry, we recognized we were a diverse group. While our diversity offered us resources, first we had to know more. And at the same time, we needed to understand and feel comfortable with cooperative inquiry as a method. Experiencing the relationship dynamic of building friendship while also becoming knowledgeable about working as cooperative inquirers was like trying to sort out the riddle, “which comes first the chicken or the egg?” To help us move forward, Linda proposed that we cook and eat together. She understood the familiar, inviting activity of cooking and sharing a meal, could be used to help us begin to see CI an emergent design, much like cooking, that allows for people stepping up, out and back, to get what we wanted. As we volunteered for some tasks and shared others, in grilling on a summer evening, we talked informally. Through dinner and into the night we told stories that described social change issues and goals, noting with enthusiastic comments and sometimes laughter, when and where these ideas overlapped across our differences.

### *STORYTELLING FITS*

That first session for inquiry helped us to see the importance of storytelling for our work. Stories of issues and ideas about social change easily emerged as we sat and talked. Later, we used rounds of stories and storytelling for interviewing leaders about social change, and we then used rounds of stories and storytelling to help us see and make sense in answering our question. Altogether we gathered and told more than 30 stories in our time together. The stories allowed us to sort through complex and sometimes messy, information. And, in using the stories we could also see more “whole-istically” and imaginatively how to learn from experience and shape that meaning into our own work for leading. Not only was there concrete information about when and where, but the stories contained roles and effective strategy. Our leader storytelling matched the multi-dimensional, overlapping qualities of social change leadership itself.

As our work progressed, we added a variety of tools to aid inquiry:

1. Conference calls
2. Readings
3. Field trip observations
4. Informal brainstorming over cups of coffee, meals, and walks.

All of these experiences helped us sort out how we could find answers and learn, as well as how cooperative inquiry would help us.

### *SUSPENDING TIME: TAKING THE TIME “WE-NESS” NEEDS*

One of the important dynamics of our inquiry centered around ways to respect ourselves and our differences in working together. A central answer to our inquiry question is a sense of “we-ness” in which social change leadership is described as identifying, knowing, and then working with

relationships more widely, more deeply, and very skillfully. When we started brainstorming our interests, Linda and Monica began to see that members of our group uniquely held a dynamic for diverging. That divergence was tangible in our first inquiry meetings. Seven of us participated in our first weekend session. Eight participated in the next. And different members were at both sessions.

In looking back, the dynamic of differing schedules seems much more important to our work, than it did when we were first beginning. We needed time to be “we” and for respecting how each of us wanted to participate in the inquiry. Our solution was to expand our time for engaging ourselves. This decision gave each of us choice, and as a result a place for us to feel the respect we have for each other, as well as for ourselves, personally, individually. Instead of using the question outlined at our first session, we explored additional, complementary, and different ideas for our inquiry at our second session. This suspension of time added authority for developing our work as we saw fit, which in turn added momentum, interest and our commitment.

### *ACTING AND REFLECTING*

The primary method for research and action in our inquiry was interviewing and gathering stories of social change leadership. Interviews were our actions. We had a multi-level plan for interviewing ourselves, interviewing other awardees, interviewing community leaders, and determining whether or not we would interview nationally recognized leaders for their insights on successes of social change leading. All together we interviewed 10 leaders outside our group. These included the minister of a rapidly growing faith community, the leader/founder of an urban charter school, a former prisoner working with other people who were making the on transition between prison and community, and a man who was homeless, recognized for his contributions to a Governor’s Task Force. Then we conducted multiple interviews of ourselves. We taped and transcribed the interviews to use them for our inquiry reflections.

Later, we as a group and as individuals, we identified important themes found in the interviews. But our inquiry did not stop there. First, we reviewed our interviews and the stories within them, and then we identified aspects of the interviews that caught our imaginations. Several interviewee ideas are included in this report as particular contributions, listed with names, when possible. Often, as we began to describe what interested us from the interviews of others, the idea was followed by reflections and conversation about what we experienced as leaders. These conversations stirred our curiosity and led to more explorations within our own experiences as leaders.

## **VI. HOW WE KNOW WHAT WE KNOW/ VALIDITY**

From the start of our inquiry, the question of “how we know what we know” intrigued the members of the group because of its practical and philosophical implications. We were, from the beginning, determined to develop a concrete product that would share what we learned (a.k.a. what we know) and would be useful to a wide range of leaders and organizations. Some members of the group were interested in the larger question of how *do* we know what we know. In order to satisfy both the practical and the philosophical, we needed to be “sure” that what we did and shared was “right,” accurate, valid.



This question motivated us in three ways: to play devil's advocate for each other, to ask each other whether this "makes sense" or "is true for you," and to look for patterns in our work. These strategies allowed us to adopt different ways of looking at an issue, play with other perspectives, and see our work both "up close" and "from a distance." It also gave us the opportunity to make connections between our own stories, others we had collected, group discussions, shared experiences, and readings. The more we were able to make connections among all our sources of learning, the more certain we became that we were unearthing some "truths" about social change leadership.

The role of the devil's advocate was rotated throughout the inquiry process. Rather than assign the role in a conscious effort to strengthen the validity, members of the group asked the "hard questions" throughout.

Well that brings up how people are using the word love ... Jack Welch may love to win, might love the game, might love to succeed ... that's a different setting for the meaning – Michelle

Let's try it the other way, do you know social change leaders who limit that focus, who don't have as much passion ... and doesn't that type of leader keep the system in place? - Linda

What is the difference then? – Mónica

Throughout the inquiry we were sensitive of the "rightness" of what we learning, and doing, for each group member. As we came to know each other better, these were often mixed in with jokes and laughter around styles of learning and ways of thinking,

Can you say that again? You know me, I need it to be concrete - Mary

We are different, and we have different ways of managing who we are ... sometimes that happens in group activities – Susana

We were also reminded of the importance of checking our assumptions about our work,

When we read the Studs Terkel book there was no story about gay and lesbian leadership ... I wanted to make certain that we had a place in this work to include the leadership that comes from that – Debbie

Lastly, we sought to reinforce our work by looking for similarities, or patterns by sharing our thoughts about a common experience (such as a book or field observations – see appendix for more information) and reading our interview transcripts in small groups and discussing them as a whole group. This, it turns out, was easier than we first thought,

Almost to the same words ... we marked the same ideas [from an interview transcript] - Theresa

One of the things that she sees is what we have been talking about ... all can lead – Michelle

Each of us said almost the same thing ... that we are in the work because the [organization] does the right thing ... for the people you are serving – Stan

By using these strategies we all took part in analyzing the information we gathered and made sense of it together. More importantly for the group, we gained confidence in our work, the importance of what we were learning, and the need to share it with others.

## **VII. OUR SOCIAL CHANGE LEADERSHIP & LEARNING PRODUCT**

The development of the group product, a communication tool, functioned as our inquiry's 3<sup>rd</sup> thing. And, as a 3<sup>rd</sup> thing, the product helped us have a focus important to ourselves, a group striving for "we-ness" while also being a group of diverging interests. Activities and plans for the product, evolved into a multi-media, digitized compact disc (CD) of leader interviews, and other materials for education about social change leading. Our product plan emphasized conversational interviews with multiple levels of social change leaders: other LCW awardees; community leaders we knew; and national/international leaders of social change.

Technology supports our product and learning in a whole-brain, or whole-istic manner. In a compact disc we can offer written stories, as well as audio and video clips to provide information in a variety of ways. We describe leading as well as important big ideas, operating values, and compelling issues of social change. The multiple modes for describing help us express what we know about *our* leading: the importance of we-ness and working with others; the value of making the world a better place; the need to bring forward social change leaders as people of spirit and compassion. In our product we can also offer explanation through guides and practical strategy. In that way, we explain the critical, objective aspects of social change leadership.

Our product centers on a menu that allows choice for the user, and as such, it appeals from another important perspective. The product aids in supporting learners and future leaders, who like us, are diverse in their ways of engaging, reflecting and learning. Like us, these learners and future leaders, want choice, and the implied respect for their different ways of learning, as they explore and invite themselves into social change.

Finally, our product, like the work of social change leading, has a big scope or vision. It, like our inquiry schedule, needs the time it will take to meet our goals for it. Now, we are completing a CD prototype with different examples of what it can be. The pilot includes: audio clips of interviews, photographs of social change leaders in action, and several stories of how leaders came to their work, along with strategy articles and guides.

## **VIII. FUTURE DIRECTIONS**

We are almost at the end of our story. What remains is where our journey goes from here. As can be expected, our hopes are both practical and philosophical ...

Ultimately we would like to see our Social Change Leadership and Learning CD be developed further and then disseminated through LCW, our organizations, and other organizations nationwide. The CD would be useful as a resource for leadership development. As a springboard

for experienced leaders, the CD could be used to initiate discussion, reflection, and other CI's. For new leaders, the product would be used as a way of introducing leadership for social change and to prepare them for things to come. The CD could also help to "educate" others outside the world of social change to understand *our* leadership.

As a group we have also talked, briefly, about the possibility of continuing this CI – or develop a new one – with other LCW alumni. At the end of our time together it seems that we have more questions that need answering. As happens often in a cooperative inquiry, after having had a true learning experience, participants want to continue as new questions emerge from the old one. These new questions offer the possibility of new learning and more clarity around our roles as leaders for social change.

It is important to note that we end – and continue – our journey with great hope and an appreciation of the power of hope. Hope sustains us, hope compels us, and hope brings us together. Our work revolves around the fundamental belief that the world can be a better place and that we can help make it so. Often unspoken, but unshakeable nonetheless, our hope for a peaceful, more human tomorrow allows us to concentrate on our work today. The book we chose to read, *Hope Dies Last* by Studs Terkel, provided a blueprint for hope and offered the notion that hope is a tool, a strategy to change the world and rather than brush it aside, we need to bring out in ourselves and in others. Without hope we would be lost.

Individually, we end this leg of our journey with renewed strength and hope for the future of our organizations, communities, and ourselves. We take with us memories of difficult moments and hard questions, as well as friendship and fellowship, laughter, inspiring vistas, and hope for the possibility of adventures yet to come.

# APPENDICES

- **Cooperative Inquiry Methodology**
- **LCW-CI Meeting Agendas**
  - *August 15-16, 2003, in Upperville, Virginia*
  - *October 16-17, 2003 in Tarrytown, New York*
  - *December 4-5, 2003 in Austin, Texas*
  - *March 26-31, 2004 in Boulder, Colorado*
  - *August 8-10, 2004 in Burlington, Vermont*
- **Interview Questions**
- **Field Observations**
- **Readings and References**

# Cooperative Inquiry Methodology\*

## What is cooperative inquiry-- CI?

Cooperative Inquiry is a way of research that is not “on” or “for,” but is an approach that is truly “with” people. Peter Reason, one of the first CI writers/researchers.

**Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has. Margaret Mead, anthropologist and leader.**

**Definition:** Is a flexible method for **leadership and exploring/creating knowledge in a group that can extend beyond the group of inquirers.** Cooperative inquiry (CI) expands problem-solving and innovation. As a method, is a way of working with other people who have similar concerns and interests, using a compelling question to research, learn and make sense of issues, ideas, and insights. It aids in making decisions, which often challenge team and coalition projects, and it develops relationships and networks for the longer term. CI offers a way to explore a topic that advances leadership knowledge and that is also tested, as well as practical and action-focused.

**History:** People have written about CI for approximately 25 years. Some of its researchers and practitioners include: Peter Reason, John Heron and Elizabeth Kasl. CI builds on and borrows from the fields of cultural anthropology, qualitative research, community education and adult learning, as well as emerging models for organizational learning, team learning and knowledge management. However, today’s media emphasizes business issues. While many have used CI informally in many places, including businesses, many professionals and community leaders have limited awareness of this method.

## Unique to Cooperative Inquiry

Instead of using the traditional results planning, or defined objectives that drive most projects, the CI method centers on using a very important question/inquiry of knowledge—one that needs answering in order to make a difference. The use of an important question sets up several advantages. It—

5. Encourages effective communication, internally and externally.
6. Builds a flexibility for planning that supports work in today’s world of unexpected, rapid change.
7. Develops relationships that are ongoing, for work after the current work is completed.
8. Supports a reflective process for each member, as s/he chooses to use it.

## Why do a Cooperative Inquiry?

For many executive leaders, directing an organization, particularly a change-focused nonprofit, can be a daunting task. Not only must the leaders advance a compelling vision for their organizations, but also they must navigate their ways through budgets, staff management, and service performance. That’s a tall order for most nonprofit executives, given that many of them advance from technical positions or more theoretical study, to management without time and attention to what is supporting and advancing their leadership. In addition, it’s lonely at the top, and difficult to share leadership challenges with others, either internally or externally. As a result, leaders can easily find themselves with a yearning for what it takes to advance networking, relationship, or knowledge on a specific topic that they really want while also leading.

## What kinds of organization and leaders have used cooperative inquiry?

- Medical Centers- Nurse Managers/Administrators
- Foundations- Project Directors and Grantees
- Community-based Organizations- Executive Directors
- Public School Systems-University Partnerships—Principals and Superintendents
- Community Colleges- Presidents and Senior Staff, Faculty groups
- Research Institutions- Teams of Experts

- Faith-based Groups- Leaders
- Cooperatives- Members in groups of 6-9
- Business- Consultants-Leaders Advancing Innovation
- Public Policy Unit- Elected and Appointed Officials

### **What are examples of results from CI?**

- A group of six (6) nursing managers in a large medical center expanded their thinking and actions to include significant attention to family-work relationships. This attention shifted policy for workers, and resulted in an employee-centered recognition event.
- A group of 11 community women formed an organization to advance peer health counseling and through their CI effort discovered and then promoted a deeper level of cultural competency, spanning issues of black, brown and white.
- A group of business educators expanded their understanding of undergraduates and determined ways to help students take on more ownership/responsibility for their education.
- A group of business owners determined to understand the differences between men and women at work that have influenced “the glass ceiling” and through their cooperative inquiry now offer a stream of professional services and executive coaching which are advancing women’s leadership.
- A group from Leadership for the Changing World (LCW) explored space and opportunity for individuals to recognize themselves as leaders, identifying practical ideas/strategies for stepping up to leadership, as well as stepping down, or creating additional places for the leadership of others.

### **What kinds of “big idea issues” which support relationship/networking, are often included in a Cooperative Inquiry?**

Cooperative inquiry gives leaders a chance to expand their thinking around questions such as these:

- How can we add value to what we do by leading in a collaborative way?
- What can we see together to give more choices, that isn’t being seen by us as individuals, right now?
- What does it really take to get the results we want?
- What are additional techniques of leadership, gathered from the real world of action?
- What are the dynamics of power that accompany leadership and influence relationships?

### **Examples of Inquiries and Their Topics—**

- What does it mean to be socially engaged, professional women of color?
- What are the ways that peer health counseling adds value?
- How do we as administrators promote communication that builds inclusion and cultural competency—across shifts, departments and multiple work units?
- How do we as business leaders make the business case for providing a more value-centered workplace?
- What will it take for our Foundation to authentically include more diverse organizations in our grant making process?
- How can we create the space/opportunities for individuals to recognize themselves as leaders and develop leadership?

### **If I Decide To Do An Inquiry--- What’s My Role?**

Members of a cooperative inquiry become co-researchers and co-learners, with many options. You will

- Decide an important topic for inquiry.

- Act on exploring that topic as you choose—using a variety of actions and other resources, including published material, expert interviews.
- Determine the operating ground rules--- and be encouraged to abide by them!
- Participate in ways that support expanding ideas and sharing your wisdom.
- Identify “what matters for leadership”-- product(s) that communicate the inquiry.
- Build longer-term relationships and networks.

### **More on Learning Available in a Cooperative Inquiry: What kinds? Why is an “Extended Epistemology” Important to Learning in CI?**

Researchers, such as Peter Reason, John Heron, Elizabeth Kasl and Lyle Yorks, have identified a particular learning richness in the cooperative inquiry process. CI involves at least four (4) different kinds of ways of knowing, which makes the approach a unique resource for change, including social change or justice. The CI-based approaches to knowledge, are labeled an extended epistemology, a term which means the theory of how you can know an idea, with particular attention to not only formal academic theory, but also important attentiveness to the knowledge or wisdom available informally. In CI there can be learning from direct experience (termed experiential knowing), in which people include not only description, but also appreciation or expression of their feelings; there can be learning by imagining options and creating scenarios or possibilities (termed presentational knowing); there can be learning which draws out or builds abstract ideas and principles about something, often described as information or findings (termed propositional knowing); and there can be the wisdom of exactly how to carry out a strategy, often labeled a skill or competence (termed practical knowing).

The extended epistemology or process for knowing, available in cooperative inquiry, is radically different from other models for gaining knowledge. It is centered on people examining their own experience and actions as a “pool” from which to develop further knowledge. To avoid “group think” and the criticism of not enough objectivity, cooperative inquirers actively promote and engage in rounds of actions and reflections on those actions. In the group reflective process, there are multiple opportunities for a critical examination of the ideas being developed, testing them against direct experience in an integrated way to know that the knowledge makes sense, and is sound and adequate.

*\* Written by Linda Smith and Monica Byrne Jimenez, using the research and writings of Peter Reason, John Heron, Elizabeth Kasl and Lyle Yorks.*

**Introduction to Cooperative Inquiry as a Method**  
**August 15-16, 2004**  
**Used by LCW-CI Group 2**  
**To Inquire into Successes and Values of Social Change Leadership**  
*Developed by CI Members*

The beginning of a cooperative inquiry must be appealing—the process is complex and can be seen as daunting, messy and murky. The invitation needs to link not only hopes of relationship and reflection, but also delineate the possible options for ideas, insights and issue solutions. Below is the way we chose to introduce and invite our members into our work. We outline it here in detail as a springboard, believing that you and your colleagues will find your own, unique inviting way to begin your inquiry.

**CI Experience**

- Models cycles of action & reflection
- Explores issues of leadership and relationships
- Highlights communication
- Both actions and reflections
- CI strategies match questions
- Helps to re-frame or shift to considering solution-centered thinking (instead of problems)
- Space (physical and mental/emotional) for inquiry is important. It is both formal and informal and supports dialogue, and a feeling of togetherness.
- Supports a sense of serendipity in developing ideas/ strategy.
- Brainstorming is appreciative, has a focus.

**CI Readings**

- Excerpt from *The Leader's Edge* by Palus & Horth, Chapter Five “Co-Inquiry”

CI Actions

Participate	Interviews (giving/doing)	Tell/Hear Stories
Fieldtrips	Journaling	Taping (audio/video)
Organize Campaigns	Start other CI's	Workshops
Slide Shows	Getting \$\$\$	Proposal/Grants
Presentations	Focus Groups	Change Practice
Gain New Perspectives	Talk about what's important	
Writing (articles/books/manuals)	Develop (strategies/programs/policies)	

CI Reflections

Journaling	Dialogue	Focus Groups
Think about stories	Identify Tensions	Identify Strengths
Determine what matters in participation	Identify operating values	
Determine how we organize	Taking experience & making sense of it	
Making meaning (new ideas/wisdom/naming)		

Examples of CI Schedules and scope

High-Tech Teachers ----	3-Day Workshops	
	Using a computer “intranet”	
Community Women ---	6 hour meeting, once a month for	9 months
	Sought to promote roles for breast-feeding and peer Counseling	



Regional Non-Profits ---  
spacing between)

3 One-day meetings for

9 weeks (three week

Wish to provide better/more programs that “fit” teens

**LCW-CI Meeting #1**  
**Upperville, Virginia**  
**August 15-16, 2003**

**Friday Evening, August 15**

The BIG Picture: By the end of this weekend, we will have a proposal of 3-4 pages with 3-4 questions that identify our inquiry topic. For each question we will have ideas and descriptions. We will also have a strategy, and/or steps, for our CI explorations

**Broad Agenda:**

- A “mini-experience” with CI – cooking our meal together
- Working more with CI – so we know we are doing what we say we are doing (Saturday a.m.)
- Developing our questions and proposal ideas (Saturday p.m.)

**Detailed Agenda**

- Lay out “Big Picture”
- Words List - describing our idea(s) of leadership (list detailed below)
- Cooking together/CI Experience – raw materials (salmon, vegetables, corn, potatoes) with variety of recipes
  - Models cycles of action & reflection
  - Explores issues of leadership and relationships
  - Highlights communication
- Reflection ... going deeper
  - How did your role in dinner help you to think about your leadership?
  - Discussion of leadership
  - More stories about when leadership was “sticky”
  - Looking at tension between our sense of urgency and our need for reflection
- Readings for Saturday
  - Excerpt from *The Leader's Edge* by Palus & Horth, Chapter Five “Co-Inquiry”.
  - Excerpt from *Lives of Moral Leadership* by Coles, case study of Senator Robert Kennedy and creation of child nutrition programs.
  - Look for: interesting ideas, what “it” is, and what it’s not.

**Saturday, August 16**

Detailed Agenda for Morning

- Review Agenda, Ideas & Responses
- Discuss “Streams” (from above) of Day
- Show “March of Dimes” video (experienced some technical difficulty agreed to show it October meeting)
- Read & Review “Co-Inquiry Chapter”
- What did we discover?
- Where did we find elements for strategy?
- Develop Criteria (1<sup>st</sup> pass)
- CI Action & Reflections (detailed below)
  - Working Lunch
  - Kennedy Case Study
    - Where is your developing edge? (memorable story where leadership is “unfinished” – some of this discussion occurred Friday night)
    - Where is the important leadership-communication wisdom to frame our question?
  - Important Ideas & Sharing

- Where our ideas of leadership-communication needs/wants to be stretched?
- Stepping “into” that
- Brainstorming #1
- Question Forming
- Individual post-it notes
- Grouping questions together to share understanding and look for underlying issues
- CI Strategies – what matches our questions from CI Action/Reflection list
- Ideas for Scheduling
- Criteria Development (2<sup>nd</sup> Pass)

Participants:

Susana Almanza

Monica Byrne-Jimenez

(Michelle de la Uz)

Stan Eilert

Steve Forrester

(Theresa Holden)

(Mary Houghton)

Eduardo Lopez

Linda Smith

Debbie Warren

**LCW-CI Meeting #2**  
**Tarrytown, NY**  
**October 16-17, 2003**

**Thursday Evening, 6:00-9:00 pm:**

- Dinner & Getting Reconnected
- Agenda Building
  - One goal/wish for meeting
  - What would a “successful” meeting look like to you?
- Linda’s List
  - Share resources
  - Think about it overnight
  - Reporting to PWM

**Friday, 9:00 am – 3:00 pm:**

- Leadership Stories & Lessons
- *Clarifying roles & “authorship”*
- Revisit Question & Proposal and *Purpose*
- Discuss Strategies- Options include:
  - Reintroduce list from August Meeting
  - Watch MofD Video
  - Visit “Leader Talk” website
  - **KEY:** How does/do the strategy/ies help us answer our question? How does it help us accomplish our purpose?
- Lunch
- Deciding on Action & Strategies
  - Creating list of “leaders” to contact
  - Brainstorm questions to ask
  - Organizing the information we get
  - Creating a tentative timeline
  - Ideas for keeping in touch
  - Dividing the work
  - Next Steps
  - Group/Individual
  - Individual
  - Following up w/Susana
  - November (?) Conference Call

**PARTICIPANTS:**

Monica Byrne-Jimenez  
Michelle de la Uz  
Stan Eilert  
Steve Forester  
Theresa Holden  
Mary Houghton  
Eduardo Lopez  
Linda Smith  
Deborah Warren  
(Susana Almanza)

**LCW-CI Meeting #3**  
**December 4-6, 2003**  
**Austin, Texas**

**Thursday Afternoon and Evening, December 4**

- Lunch and Getting Reconnected
- Site Visit at PODER, and Field Tour
- Dinner with PODER Leaders/Gaining Ideas and Insights for our Inquiry
- Naming values that we want to include: Courage and hope for building relationships

**Friday Morning, December 5**

- Travel to Ranch Retreat Site
- Setting Up Our Work Session Goals and Our Agenda (as a group)
- Outlining a Plan for Answering Our Question (Questions within the question; logistics)
- Role for Interviews at Multiple Levels
- Identifying Interview Questions and Their Goals

**Friday Afternoon and Evening**

- Round One of Reflections: Our Stories of Coming to Social Change
- Conference Call with Eduardo: Reviewing/testing Our Plan
- Role Play of Interview
- Round Two of Reflections: Using Role Play Interview and Our Stories
- Finding an important question: How did you come to work in social change?
- Outlining Themes and a Model for Future Interviews
- Walk through hill countryside, dinner, and stories by the fire

**Saturday, December 6**

- Breakfast and Sharing Thoughts/Ideas Informally
- Review of Themes and Ideas We are Beginning to See
- Identification of Interview Levels: Other Community Leaders, LCW awardees, Ourselves, Options for National level
- Our Calendar for Work, Making Individual Commitments to Acting/Reflecting

**PARTICIPANTS**

Susana Almanza  
Monica Byrne-Jimenez  
Michelle de la Uz  
Stan Eilert  
Teresa Holden  
Mary Houghton  
Linda Smith  
Deborah Warren  
with Eduardo Lopez, Reviewer/Technical Consultant

**LCW-CI Meeting # 4**  
**March 26-31, 2004**  
**Boulder, CO**

**Friday Afternoon/Evening**

- Meeting at the Denver Airport and Reconnecting
- Dinner with Outline of Ideas and Activities

**Saturday Morning**

- Review of goals, interview schedules, set up of LCW interviews, re-gathering at Bishop Tutu speech (03-30, not scheduled earlier)
- Overview of Interviews
- Getting Ready to Use Our Reflections to Determine Answers to Our Inquiry

**Saturday Afternoon/Working Lunch**

- Working in Pairs with a Selected Interview Transcription
- Round of Large Group Reflections, Informally/formally Identifying Important Stories of Leadership Success, Values
- Working in 3s to Interview and Gather Stories of Our Successes as Leaders, Questions as Reflections (small group)
- Round of Large Group Reflections/Informally/formally Identifying Values and Distinctions of Social Change Leadership
- Testing our Answers
- Finding and naming “we-ness”
- Seeing Vision in Social Change Leadership (SCL)
- Identifying Values
- Seeing Roles
- Understanding the Need to Delineate and Name the Qualities of SCL, for supporting/developing work and future

**Saturday Dinner**

- Appreciations and Informal Identification of Leader Attributes
- Recognizing Our Strengths as Leaders, Expressing Our Authority and Hope

**Sunday Morning**

- Review of Our Work Plan
- Outline and Commitment to Our Actions and Reflecting Process
- Set up calendar for meeting and conference calls
- Make a commitment to reflecting and acting, similar to the richness of this session
- Transition to LCW (awareness and preparation for a physical and mental move)

**Tuesday Evening**

- Meet at LCW headquarters
- Attend Bishop Tutu speech/event
- Informal Check-in
- Interviews of additional LCW awardees

**Wednesday**

- Monica and Linda review resources (tapes, transcripts, notes, newsprint) for report
- Outline report ideas for sharing with members of our group

**PARTICIPANTS**

Susana Almanza  
Monica Byrne-Jimenez  
Michelle de la Uz  
Stan Eilert  
Theresa Holden  
Mary Houghton  
Linda Smith  
Deborah Warren

**CI Meeting #5**  
**August 8-10, 2004**  
**Burlington, VT**

**Sunday, August 8 Evening**

4:00-7:00 Arrivals  
7:45-9:00 Coming Together & Dinner

**Monday, August 9**

7:30-8:00 Breakfast  
8:00-8:30 Review Agenda Items & Plan for Time Together  
8:30-10:00 Reflection on Individual Leadership

- How would you characterize your own social change leadership?
- What successes and values can you see in yourself as a leader?
- How has your work changed as a result of the cooperative inquiry?

10:00-10:30 Break  
10:30-12:00 What about CI?

- How has this cooperative inquiry as a process influenced your work, seeing yourself as a leader?
- What has helped/worked?
- What could have been done differently?

12:00-1:00 Lunch  
1:00-3:00 Review of CD-ROM (our leadership and learning product)  
3:00-5:00 Tour of Burlington Land Trust Projects  
5:00-6:00 Break  
6:00-10:00 Celebrating and Dining

**Tuesday, August 10 Morning**

8:00-8:30 Breakfast  
8:30-9:00 Morning Reflections  
9:00-11:00 Review NYU Report & Write Addendum  
11:00-12:00 Next Steps & *What if's* ....  
12:00-12:30 Lunch  
12:30-1:00 Endings & Departures

Participants

Susana Almanza  
Monica Byrne-Jimenez  
Michelle de la Uz  
Stan Eilert  
Theresa Holden  
Mary Houghton  
Linda Smith  
Debbie Warren

## Interview Questions

On purpose, our Collaborative Inquiry interviews are more informal than formal. Think of them as conversations that need 1-3 questions to get started.

Then, the interview conversation built upon the stories and examples shared by the interviewee.

### **In all of our interviews, we discovered and determined, that it is important to ask--**

How did you come to see yourself as a social change leader? Or,  
What brought you to your work and a deeper understanding of it?

### **Other questions that added to our conversations...**

- How do you go about and continue to communicate the big idea/vision to a larger world?
- What do you think was the spark that led to that social change action? What else was in that?
- What do you see as one of the main accomplishments of your organization?
- What level income family do you help, (or see as being overlooked, needing help)?
- To move your work forward, you need capital investing. How do you sustain or capture that resource—the techniques?
- As you reach out to other groups, especially more moderate, mainstream groups, how has that influenced your mission?
- Linking-- What do you do to link up ideas like that are similar, to other movements, either nationally, or locally? And, will these links help assure success?
- Broadening the appeal-- I'm interested in how you talk to those who are different, such as moderate Republicans. How do you engage them, get their interest or buy-in? How do you talk *with* them?

What do you see as sustaining the work of change that you do, both personally and professionally?



## Field Observations: Experiential Learning

Repeatedly in our cooperative inquiry, we developed opportunities to take field trips as a group. We believed that our observations added information, insights as well as new ideas, and, we learned on multiple levels. Not only did we understand about problems and solutions through explanation, but also we learned more deeply through stories and expression of what we experienced as we participated in these trips.

We wish to thank and acknowledge two particular social change organizations, their leaders and their staffs, for organizing our field observations.

### **PODER: December 4, 2003**

People Organized in Defense of Earth and her Resources (PODER), is an authority on the environmental economic and health impact of industries in communities of color. Located in Austin Texas, PODER addresses issues of social and environmental justice for the East Austin communities. Susana Almanza, a member of our cooperative inquiry, worked with her staff and community leaders to help tour neighborhoods to see the issues of environmental justice in East Austin. Then we heard the stories of how PODER's community leaders, changes the environmental problems into solutions for a safer, better place, not only for the people but also for Mother Earth.

PODER can be contacted at: [www.PODER-Texas.org](http://www.PODER-Texas.org)

### **Burlington Community Land Trust: August 9, 2004**

The BCLT is a nonprofit, member-based organization who has as its mission to ensure access to affordable homes and vital communities through the democratic stewardship of the land. The Trust works with land options, renovations, and the needs of people for housing and community services. Mary Houghton, a member of our cooperative inquiry, along with BCLT staff, organized a tour of housing and building projects, located on multiple sites in and around the town center of Burlington, Vermont. As we toured, we saw how BCLT provides a wide range of housing opportunities, and how it links housing for families to land stewardship that makes for better and wiser community building.

BCLT can be contacted at: [www.bclt.net](http://www.bclt.net)

## Readings and References

The following resources were read by members of our group:

Interview Transcripts (from Community Leaders, LCW awardees, members of the Inquiry) conducted January- August 2004. (unpublished)

“Co-Inquiry” a chapter from *The Leader’s Edge: Six Creative Competencies for Navigating Complex Challenges*, written by Charles Palas and David Horth, Center for Creative Leadership: Jossey-Bass, 2002.

*Hope Dies Last: Keeping the Faith in Troubling Times* by Studs Terkel. The New Press, 2003.

“Working with Robert Kennedy” excerpted from *Lives of Moral Leadership*, written by Robert Coles, Random House, 2000.

*Values Used for Leading: What’s Important?* A Workshop Tool from Smith Consulting, used with permission, August 2003.

### **Additional References used for this Report:**

Transcripts from the LCW Collaborative Inquiry Group 2, 2003-4, Sessions conducted August 15-16, 2003; October 16-17, 2003; December 9-11, 2003, March 5-7, 2004 and August 8-10, 2004. (unpublished)

*How to Change the World: Social Entrepreneurs and the Power of New Ideas* by David Bornstein. Oxford University Press, 2004.

*Collaborative Inquiry in Practice*, by John Bray, Joyce Lee, Linda L. Smith, and Lyle Yorks. Sage Publications, 2000.

*The Deep Blue Sea: Rethinking the Source of Leadership* by Wilfred Drath. Center for Creative Leadership: Jossey-Bass, 2001.

*The Heart of Change: Real Life Stories of How People Change Their Organizations* by John Kotter and Dan Cohen. Harvard Business School Press, 2002.

*Human Inquiry in Action* by Peter Reason (ed.). London: Sage Publications, 1988.

*The Leader as Communicator*, written by Robert Mai and Alan Akerson. Amacom, 2003.

*Long Walk to Freedom: The Autobiography of Nelson Mandela* by Nelson Mandela. Boston: Back Bay Books, 1995.