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The Tapestry of Leadership: Lessons from Six Cooperative-Inquiry Groups of Social Justice Leaders

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This chapter extracts lessons about social justice leadership and about the use of cooperative inquiry as a vehicle for conducting participatory social research from six cooperative inquiry (CI) groups comprised of awardees from the Leaders for a Changing World initiative that honors and convenes innovative, under-recognized social justice leaders, with the express intention of creating insight into the nature of effective progressive leadership. Three of the participants in the CI groups joined one of the facilitators in identifying themes and creating a tapestry of social justice leadership from the reports of six cooperative-inquiry groups. Three patterns are present in the tapestry: (1) developing democratic identity; (2) developing democratic agency; and (3) sustaining democracy, presented in eight values threads and six action threads. Lessons about the process of CI and insights into the motivation of participants are also discussed.

What can we learn about effective models of leadership from social justice organizations that work collaboratively with broad-based grassroots constituencies? And, what can we learn about cooperative-inquiry as a valuable practice for this kind of leadership? This chapter extracts lessons about social justice leadership and about the use of cooperative-inquiry as a vehicle for conducting participatory social research from six cooperative-inquiry (CI) groups comprised of program participants from the Leaders for a Changing World initiative.

Leaders for a Changing World (hereafter called The Program) is supported by the Ford Foundation for honoring and convening innovative, under-recognized social justice leaders, with the express intention of creating

insight into the nature of effective progressive leadership. The Program works in partnership with the Research Center for Leadership in Action (hereafter called The Center) at the Wagner School of Public Service, New York University. CI is one of three research components in The Program – the other two being ethnographies and narrative inquiries focusing on leadership in the organization receiving the award (see Chapter 28 by Sonia Ospina et al. in this Handbook).

Cooperative-inquiry groups were formed among the program participants to provide a systematic structure for learning from experience through a process of co-inquiry. Two inquiry groups were formed from each of three years of program participants, 2001, 2002, and 2003 respectively. Participation in these groups was voluntary. There is a political dimension to the principle of co-inquiry that maintains that people have a right to participate and express their own values in the design of an inquiry into their experience. Participants organize themselves in small groups to address a compelling question that brings the group together in order to construct new meaning related to their question through cycles of action and reflection and practicing validity procedures (Heron, 1996; Heron and Reason, 2001/2006; Kasl and Yorks, 2002).

WHY STUDY SOCIAL JUSTICE LEADERSHIP?

The Program is built on the premise that the images of leadership in the popular media and leadership structures promoted by social hierarchies are problematic for the creation of democratic culture. Popular images of leadership tend toward cults of personality. And while there is a vast academic leadership literature, much of it focuses on persons defined as leaders, describing their role, their actions and behaviors, and/or the sources of their influence and authority on others. The popular business literature has largely uncritically applauded successful CEOs, ascribing to them in a very idiosyncratic manner the character of individuals as the source of the success of their organizations.

A more recent stream of literature focuses on leadership as a characteristic of a social system (Drath, 2001), while recognizing the roles played by leaders in sustaining systemic leadership (Ospina and Sorenson, 2006; Palus and Horth, 2002). It is this perspective that is a key premise of the research component of The Program (Cohen, 2005). The Center understands social change leadership as a collective achievement resulting from the meaning processes that a group of people committed to social justice successfully engage in to address a targeted social problem in the world (Minieri et al., 2005; RCLA, 2005).

WHY COOPERATIVE-INQUIRY?

Cooperative-inquiry is a method for conducting participatory research and facilitating adult learning through experience. The epistemic assumptions of CI have been developed by John Heron and Peter Reason (Heron, 1992; Heron and Reason, 1997; Chapter 24 by John Heron and Peter Reason in this Handbook). Broadly defined, CI 'is a process consisting of repeated episodes of reflection and action through which a group of peers strives to answer a question of importance to them' (Bray et al., 2000: 6). This approach to developing new understandings of practice grounded in a broad base of practitioner knowledge explicitly enacts the values of the leaders in The Program (Ospina and Schall, 2000).

There are remarkable parallels between the process of CI and the form of leadership described in the inquiries. These parallels are rooted in values of building human capacity through seeking connectedness while embracing the diversity in human experience, finding meaning through relationships, and affirming the right of people to be effective. We will return to these parallels at the conclusion of this chapter. First we provide an overview of the CI process as it was enacted in The Program. Then a summary of

the analysis and insights that emerged from our meaning making from the learning from the six groups.

THE SIX CI GROUPS COMPRISING THE BASIS FOR THIS CHAPTER

Each of the six groups came to be known by an identifying name related to its inquiry question: *The Dance* (How can we create the space/opportunities for individuals to recognize themselves as leaders and develop leadership?); *The Council* (How do we as grassroots community organizers keep our organizational autonomy and build a wider movement to bring justice to our communities?); *Strategy* (How can we help people learn to be more strategic, conceptual, and creative in their thinking?); *Discovery* (What makes social change leadership successful and what values are held in common across such diverse leaders and organizations?); *The Arts* (How and when does art release, create, and sustain transforming power for social change?); *The Movement* (How do we engage and sustain a social justice movement that seizes power?).

The groups met five or six times for about two days over the course of approximately nine months, with each group determining the location and timing of meetings, as well as their overall process for inquiring into their inquiry questions. The meetings included visits to sites that illuminated the group's inquiry questions, discussion and analysis of the group's insights into their inquiry questions, and reports on new actions taken by group members based on insights from their collective discussion. Each CI group had a university-based facilitator whose role was to support the richness of the discussion rather than to serve as a discussant. Each co-operative-inquiry group produced a report on their findings. Yet, as our analysis demonstrates, commonalities about the role and characteristics of social justice leadership emerged across the groups. Their full co-operative-inquiry reports are posted on The Center website (http://Leadershipforchange.org/insights/research/cooperative.php.). Additionally, a series of booklets summarizing the lessons learned from the inquiries is available from The Center at the Wagner School, NYU.

Forming the groups in the context of the larger Program was in and of itself a learning journey for The Center's staff. Program participants were exposed to the concept of cooperative-inquiry during the first program-wide meeting of their group, with the decision regarding whether or not to join one of the groups being made at a subsequent meeting. Many of the program participants harbored a suspicion of the research agenda, concerned that they were in fact subjects of research (Ospina et al., 2004). For many participants, the decision to join the CI process in The Program seems to have been a combination of interest in a compelling question put forward by one of their peers in The Program who would recruit other participants, interest in who was going to be at the table discussing it, and the idea that resources were being made available. The relative balance of these factors in motivating participation varied with different participants. The words of Vicky (member of the Strategy Group), who initially did not plan on participating in a research option of The Program, capture the interconnectedness of these factors as well as the initial skepticism about research:

> I remember my initial resistance to this whole [research] process and CI. There wasn't a compelling question, I didn't have a relationship with the people who were making the invitation and at that point … Then Larry came up to me with this idea and I am thinking that is something I can get my teeth into. Because he had an interesting question it drew me in …. Plus the other people who would be around the table talking and taking action on the question, I could see that as being valuable.

As the program evolved over the three-year period, concerns over the issue of being 'research subjects' became lessened by the experience of the CI participants in the proceeding groups, who were willing to speak about the co-inquiry aspects of the process and their learning. Also The Center's

facilitators evolved an open process for facilitating the emergence and integration of potential inquiry topics during a program-wide meeting. This process involved open brainstorming of potential topics that were subsequently integrated through dialogue and discussion into two topics that held broad interest as a basis for organizing a CI group.

The experience of each of the CI groups was unique and varied as a function of how they were initiated, the mix of participants, and the focus of the question. Most broadly the process unfolded along three phases. The first phase involved *refining the topic into an inquiry question* that resonated with all of the members of the group. This could take one or two meetings and involved open dialogue and discussion about possible phrasing of the question and what was engaging to each participant. The second phase involved *developing a deeper understanding of the question* through activities involving sharing materials and experience among participants, visits to exemplary field sites relevant to the inquiry question, and with participants starting to 'experiment' through taking actions between meetings. This would typically start with the second meeting and continue throughout the remaining meetings. The third phase involved *sensemaking*, through cataloging their learning, developing a report and other materials about their experience. These were not discrete, linear phases, but emergent and somewhat iterative processes. The motives, experiences, personalities, and domains of work among the participants within each group were diverse.

There is no 'orthodox' way of conducting a CI group, although the epistemic (Heron and Reason, Chapter 24) and political foundations are critical. Some of the groups strove to incorporate all four kinds of knowing into each meeting. Other groups had the various ways of knowing emerge across the meetings. Attention was paid to use of inquiry methods. Some groups adopted metaphoric learning practices such as reference to the learning window (what we know we know, what we think we know, and what we know we don't know; Stewart, 1997; Yorks, 2005), and the ladder of inference (what we have observed – first rung of the ladder; what interpretations we have made – second rung of the ladder; attributions that are the basis for these interpretations; and generalizations we are making – fourth rung of the ladder; Argyris, 1993). The goal was to develop a group culture of transparency.

The diversity of the groups was important. Some of the richest insights come from groups with participants from different arenas of social justice practice. In the arts group, this was reflected in the mixture of artists, organizers, and those playing mediating roles between the two. In the Strategy CI there were organizers, and a participant with foundation experience. One of the participants was transitioning to teaching and was making creative connections between organizing and teaching. In another group there were people working on human rights, and others on sustainability. The diverse perspectives provided by different practices, but sharing a common vision and set of values, seems fundamental to the process of engaging in critical reflection. The distinct perspectives offered by these roles added richness to the conversations about the experiences of the groups.

The facilitators had to pay careful attention to providing light control (Cumming and Collier, 2005) or light touch (Yorks and Nicolaides, 2006), offering enough structure to sustain the dynamic and inviting the freedom that surfaces innovative responses to the experiences participants were having to the various activities and actions being experienced. Relationships are at the heart of light touch, with participants and facilitators establishing boundaries that are mutually beneficial for all concerned. Essentially the facilitators were holding the space for the inquiry process to unfold. The reports reflect the value of establishing and sustaining a 'learning space' or 'container'. In the words of one of the members of the Strategy CI:

'These meetings have become an important place for stepping out of my hectic life and connecting with ideas and thinking about what I have been doing.' The Discovery CI writes about how the CI allowed them to 'see our work both 'up close' and 'from a distance'. Abby (a member of the Arts Group) reflected on the experience: 'All of us are extremely strong-willed people … and we were all grateful, I think, to have the time to reflect on the work that is at the center of our lives. We grooved on each other's ideas, and the conveners of the group did not interfere. They nicely restated things, reminded us of forgotten insights, but respected our power.'

MAKING MEANING ACROSS THE SIX INQUIRIES

CI is both an adult learning strategy and a research strategy (Yorks and Kasl, 2002). The Group for Collaborative Inquiry and thINQ (1994) have argued that failure to communicate findings from such inquiries to the outside world unintentionally impoverishes fields in which the experiences of practitioners should be part of the knowledge base that informs theory. This chapter represents a process of learning from a secondary analysis of the written descriptions and findings of the CI groups by one of the lead academic facilitators, and three program participants who had participated in the CIs and expressed an interest in being part of this analysis process. The analysis was complemented with feedback and comments from two members of the team that lead the research component of The Program.

The process involved each participant in the analysis independently reading the reports, and marking themes around the questions of 'characteristics of social justice leadership embedded in the reports' and 'reactions of participants to the CI experience'. These themes were then comparatively discussed. Later, they were organized under a framework of broader themes that gave more meaning to them in terms of actionable knowledge. This took place in the context of three separate meetings. Along the way, numerous stories and reflections on The Program experience were shared. This was a process of inductive analysis and comparative dialogue based on synthesized experience, providing a degree of 'analyst triangulation', but not a formal process of inter-rater reliability.

THE TAPESTRY OF LEADERSHIP

Two frameworks for analyzing the content of the reports emerged: the first framework produced by Lyle and Arnie involved eight themes naming goals, purposes, and values of social justice leadership, and the other framework produced by LaDon and Anita involved eight themes naming actions, strategies, and behaviors inherent in social justice leadership. The two frameworks are inextricably interwoven, from which an insight emerged that progressive leadership is a 'tapestry' of interdependent patterns, consisting of threads of values, and actions, like the bands of color in a family plaid (Table 33.1). Amparo and Sonia reviewed the emerging 'tapestry' in addition to contributing to the narrative.

The three identified patterns created by the interwoven threads were: (1) developing democratic identity, (2) developing democratic agency, and (3) sustaining democracy. The 'Values' threads were: (1) building and acting on democratic capacity, (2) role migration, (3) leadership as a relationship, not a personality, (4) thinking and speaking critically, (5) seeking connectedness, (6) embracing broad diversity as an essential asset, (7) affirming the right to be as effective as we actually are, and (8) hope.

The 'Actions' threads were: (1) shared learning, (2) shared experience, (3) building the broader community/connecting to something bigger, (4) action planning and message development, (5) movement, (6) space for developing and sustaining leadership, (7) continuous base building, and (8) celebration.

Table 33.1 ***The tapestry of social justice leadership – an analytical framework***

Pattern **DEVELOPING DEMOCRATIC IDENTITY**	
Values	***Actions***
Building and acting on democratic capacity	• Sharing learning • Sharing experience
Embracing broad diversity as an essential asset	• Sharing learning • Sharing experience • Continuous base building
Seeking connectedness	• Continuous base building • Building the broader community/connecting with something bigger
Pattern **DEVELOPING DEMOCRATIC AGENCY**	
Values	***Actions***
Leadership as relationship, not personality	• Space for developing and sustaining leadership
Role migration	• Space for developing and sustaining leadership • Movement
Thinking and speaking critically	• Action planning and message development
Pattern **SUSTAINING DEMOCRACY**	
Values	***Actions***
Affirming the right to be as effective as we actually are	• Affirming the right to be as effective as we actually are
Hope	• Celebration

Just as a tapestry cannot be reduced to its threads and maintain its essence, neither can the holistic nature of leadership be captured by these patterns and threads alone. The patterns and threads of values and actions that emerged from our analysis, while distinct, are also interdependent.

Looking at the connections among the patterns and the threads reveals the nature of progressive leadership, which in turn can be discussed in terms of the stories reflected in the reports. For example, in discussing how leadership is embedded in relationship and not people, the discussion by the Council makes clear this goes beyond providing people with a 'feeling' of involvement. In two statements that illustrate the interconnection between threads [*shared learning, shared experience*, and *connecting to something bigger* as well as *creating space*], the group goes on to argue that 'where older models emphasize the leader as one who knows the most and empowers followers, the Council emphasizes that the leader must constantly learn'. Elsewhere they write that:

> In reference to the idea of 'building' a wider movement … the group is committed to being very clear on the idea that a movement is not theirs to build. The group feels that leadership is part of a movement – inside it, not outside it, and in that sense so-called leaders can only 'help to build' a movement in order to maintain a way of life. An alternative metaphor is 'growing with a natural movement'.

THE FIRST PATTERN: DEVELOPING DEMOCRATIC IDENTITY

Building and Acting on Democratic Capacity

Effective social justice leadership derives its power and capacity from the life experiences and consequent learning that people can offer to a group or community – especially the life experiences of those who are marginalized by the dominant culture in society. All people need opportunities to enact their power and capacity, and to assume responsibility for and to make choices about actions that matter. All people are equally valuable. Everybody's story counts. Close examination of the rationale underlying the inquiry questions defined by these groups reveals that the value structure embedded in this theme is central to social justice leadership. This value system is reflected in how the groups pursued their questions and in the meaning they made from their inquiry. Simply put, these groups pursued participation that was inclusive, not exclusive.

Valuing and building on *shared learning and shared experience* provide the substance for building democratic capacity and utilizing broad diversity. The Council noted an organizer 'must constantly learn and investigate' and learn 'from the people you work with' … 'plans and actions are shaped by the result of learning rather than the other way around'.

Embracing Broad Diversity as an Essential Asset: Innovation and Tradition

Effective social justice leadership draws on the creativity inherent in both innovation and the wisdom inherent in traditions. Inclusiveness of marginalized populations includes honoring and learning from the wisdom of diverse traditions as well as engaging in innovative actions. The embracing of broad diversity is more than issuing an invitation to join, but is a process of shared learning and experience – the river flows in all directions. In an interestingly coincidental way the action of cutting edge effective leadership mirrors the principles of co-inquiry and honoring learning derived from lived experience, and is open to diverse ways of thinking. These threads are expanded by continuous base building among diverse communities. Broad diversity suspends time, balancing innovation with the lessons of tradition.

Seeking Connectedness

Effective social justice leadership involves resisting fragmentation. There is a connectedness to the natural world, to other people and to each other's work. There is a growing recognition of the importance of systemic connectedness, connecting movements. Building this connectedness among movements is a leadership challenge for these leaders. Social justice movements work in varied arenas, and can find themselves competing for the attention of funders, the public, and politicians. They are continually wrestling with the challenge of *building the broader community – connecting with something bigger*. The Discovery Group developed a model a 'we-ness and bridge building' represented by a series of concentric circles of the individual, interpersonal relationships, and public coalitions.

THE SECOND PATTERN: DEVELOPING DEMOCRATIC AGENCY

Leadership as Relationship, Not Personality

Across the CI reports is the theme that 'Leader' is a role people assume to assist the enacting of leadership, but 'leadership' is actually enacted by communities. Through the inter-relationships of their members communities take the initiative and develop the political will to solve problems. When we say there is no leadership in a particular

community, we may mean the lack of an organizing figure, but we are actually commenting on the obstacles to the community's marshalling its collective capacities. Leadership as a phenomenon exists in the space between and among people, not in the individuals themselves. The quality of its character is determined by the nature of the interaction among the roles that people enact. *Creating space for developing and sustaining leadership* and *movement* enact the power of leadership as a relationship and support role migration.

Role Migration

Effective social justice leadership, recognizing that capacity can only be developed by being enacted, facilitates fluid movement between roles for all people, from follower to leader, from teacher to learner, from expert to novice, and back again. The leader models growth by becoming a learner, learning with and from the community.

The CI group The Dance goes on to describe this shift in the leadership relationship as a process of 'stepping back and stepping up'. This is something other than traditional notions of delegating. Rather there is 'a genuine shift in the relationship, in which someone steps back (whether they do it consciously or not) and someone steps up (in our conversations we've termed the latter *crossing over*)'.

> Crossing over is different from being empowered. It is not something that is granted by others, but something that we claim for ourselves. Once people claim a space by crossing over there is a reframing of the way they see themselves in the world. They have taken up their authority to influence others.

The theme that runs throughout the Strategy CI is the need for fluidity between roles. 'You can't just tell them' is repeatedly emphasized. One of the members talks about the importance of 'getting people to work without a script'. In describing a meeting with the Mayor he states: 'We know what the outcome should be, what we were trying to accomplish, who was going to do what, but no scripts. People had to think about what they were going to say.' Understanding the systemic nature of leadership and movement among roles provide what the Council describes as 'unity of view' and the Strategic Learners called 'a sense of shared fate'.

Thinking and Speaking Critically

Effective social justice leadership supports all people in developing an analysis of power relations, including its own. Special attention is given to the power of language, and to who controls expression. Effective social justice leadership sees and says what needs seeing and saying, and supports its communities in deconstructing propaganda, including its own. It speaks to power and speaks out against injustice. CI offers a model of leadership that is a cycle of investigation, planning, action, reflection, and investigation.

THE THIRD PATTERN: SUSTAINING DEMOCRACY

Affirming the Right to Be as Effective as We Actually Are

Effective social justice leadership involves not getting skewed from the core values of their movement by funders, institutions, politicians, and other structures of the dominant culture. There is a demand that the authority and expertise of diverse peoples be recognized.

Arnie, a member of the Arts CI, coined the term 'pralicy' as a companion term to 'praxis', capturing the group's belief that practice should influence the content of policy – a counter point to research influencing and shaping policy.

Hope

There is a belief in the capacity and power of people to think critically, to solve problems,

and to be expressive and caring. Social justice leadership trusts in the power of the persistent human longing for a humane world and acts out of a hopeful vision for the human condition. *Celebrating* and believing in the dignity of people, and their capacity to bring about change, is perhaps the cornerstone sustaining social justice leadership. This translates into hope and, in the words of the Discovery Group, 'hope sustains us, hope compels us, and hope brings us together'.

COOPERATIVE-INQUIRY AS DEMOCRATIC LEADERSHIP THROUGH INQUIRY

As mentioned in the introduction to this chapter, there are remarkable parallels between CI and the framework of leadership that emerged from our analysis of the six CI reports. These parallels reveal the reach of culturally embedded epistemic values in society. The extended epistemology of co-inquiry (see Chapter 24 by Heron and Reason) is the foundation for the belief that 'good research is research conducted *with* people rather than *on* people' and 'that ordinary people are quite capable of developing their own ideas and can work together in a cooperative-inquiry group to see if these ideas make sense of their world and work in practice' (Heron and Reason, 2001/2006: 179). In CI 'everyone can take initiative and exert influence on the process' (Heron and Reason, Chapter 24). This is akin to the processes of 'stepping down', 'stepping up', and 'crossing over' described by The Dance.

An epistemology of inquiring with people is distinct from traditional research models in which researchers seek to remain outside the phenomena, often acting on them through experimental designs. This finds its parallel in the assumptions held by managers who see themselves as acting on the systems from which they are apart. The tapestry of leadership patterns that emerges is distinct from many traditional models in the literature that are linked to individual behaviors and contributions. In the words of the Council, 'leadership is part of a movement – inside it, not outside it'. Many traditional models place leadership in the context of supporting and sustaining hierarchical structures – corporations, military, foundations, and universities. Leadership is mixed, intertwined with a focus on control and management of resistance. Social justice leadership is more fluid and embedded in emerging relationships. In summarizing the overall analysis, Arnie comments that 'the main strength of social justice leadership is its distributed nature – drawing on broad bases of capacity. … It has more engines.'

One can speculate that there are underlying sociological forces working here derived from our epistemic assumptions in the primacy afforded to conventional models of leadership. It is beyond the scope of this chapter to explore this speculation. What has emerged is the value of creating space for inquiry and learning for both understanding and building social justice movements.

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