

Improving Facilitation Through Levelising:
Reflecting In and On Practice

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DEDICATION

This dissertation is dedicated to my son Nicholas. His courage, resilience, and humor have been an inspiration and joy.

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I would like to thank everyone that helped me complete my Doctor of Philosophy in Educational Psychology and Research. To do so individually, would at least double this document. If I don't mention you by name, please understand that I deeply appreciate each encouraging word given and every moment spent by so many people during this very long journey.

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Abstract

This study explored the experience of engaging in reflective practice through the framework of Levelising. Reflective practice has been of interest to professionals and educators of professionals for many years. However, Levelising is a recently introduced approach. Levelising categorizes the reflective process into four modes. These modes include an awareness of what is occurring (Level I), considering one's actions (Level II), considering one's conceptual frame (Level III), and considering the conceptual frames of others (Level IV). This study focuses on my personal experience of improving my facilitation using Levelising as a framework for reflective practice. The context of the study was a professional development workshop conducted over a nine-week period with 10 participants attending.

This study was conducted as action research in the form of an autoethnography. I kept a reflexive journal of my workshop experiences and used the journal entries to reflect after each workshop session. My reflections were the data I used to study my use of Levelising to improve my facilitation practice.

I engaged in on-going formative analysis during the course of the workshop. A summative analysis was performed following the conclusion of the workshop to identify how engaging in Levelising as a framework for reflections informed the decisions I made to improve practice.

Findings indicated that the use of Levelising in my reflection on practice increased my awareness of aspects of my facilitation that needed to be changed. Levelising revealed differences in my espoused theories and theories in practice. I became more aware of the need to question my assumptions, values, beliefs, and biases prior to, during, and following facilitation experiences.

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Chapter 1: Introduction

I conducted this action research project to explore my experience of engaging in reflective practice within the framework of Levelising. In particular, I sought to discover how reflecting in this manner informed the decisions I made to improve my facilitation of a professional development workshop. My research focused on my experience during a specific time, with a specific group of participants, and within a specific organization. Although others might see similarities to their own practice, I make no claim that my results can be generalized to other situations. However, after reading my results, others might consider Levelising as an approach to reflection on their own practices.

I conducted this study as an autoethnography. An autoethnography focuses on the practitioner's actions within a social or professional environment. I adapted Margot Duncan's (2007) research methodology, the details of which are described in Chapter 2, Research Design. Her autoethnography focused on improving her practice as a manager. She kept a reflexive journal of her experiences as a manager, which served as the primary source of data for her research. Duncan's "first act of self-reflection" (p. 6) was to write a narrative describing her three years of practice prior to beginning her research project. She considered the act of creating the account of her past as an opportunity to reflect on her previous experiences and identify important themes that might guide her research focus (p. 6). In a similar manner, I feel that it is important to reflect on my previous experience. The idea of recalling my past relates to Gergen's observation that we bring our experiences and "others" with us into new situations (McNamee & Gergen, 1999).

The following account of my previous practice and related experiences begins to provide insight into the conceptual frames through which I view my current practice. My narrative also

addresses the first “DATA” of Peters’ (1999, 2002) action research process known as “DATA-DATA,” which I used as a guide for my project. The first DATA is an acronym for the active steps of reflective practice: *Describe, Analyze, Theorize, and Act*. The second DATA, *Design, Analyze, Theorize, and Act*, describes an action research approach and is outlined in Chapter 2, Research Design.

Background

I arrived in my current position after following a meandering path and making a pivotal decision over 25 years ago. My journey began as an instrument mechanic employed by the Tennessee Valley Authority (TVA). I calibrated, installed, and maintained instrumentation and control systems. I began by completing a three-year apprenticeship before earning my “journeyman” instrument mechanic certification. During the first year of my apprenticeship, I completed traditional technical and college-level academic courses (e.g., physics, algebra) conducted by college instructors in a classroom setting. I spent the last 2 years in on-the-job training, working alongside experienced journeyman instrument mechanics. After several years as a journeyman, I accepted an instructor position. I trained apprentices, journeyman mechanics, and supervisors in the technical and safety aspects of their jobs. TVA provided only minimal training to prepare me as an instructor. The instructional model I was expected to follow was traditional lecture, along with performance-based testing. While an instructor, I became aware of a bachelor’s degree program in Technological and Adult Education at the University of Tennessee.

Because of my prior college experience, making the decision to enroll in a bachelor’s degree program was not easy. After graduating high school in 1970, I immediately enrolled in the University of Tennessee (UT) but did not focus on my studies. After nearly 4 years, three

different academic majors, and wasting too much of my parents' money, the university suggested that I find something that I would be more interested in pursuing. In other words, I flunked out.

Although concerned about failing once again, I saw the Technological and Adult Education program as an opportunity to resolve the guilt I carried with me. The fact that my father did not live to see me graduate from college is one of my biggest regrets. I felt returning to school was an opportunity to finally live up to my father's wish to see me earn a college degree. A fellow instructor was also entering the program, so I enrolled as well.

The UT program in Technological and Adult Education was designed for people who train adults. Dr. John Peters instructed my first course, Adult Education. I had never experienced his particular teaching style. He lectured, but Dr. Peters recognized that students had experiences and acknowledged that each of us could learn from one another. From my experience in this course, I began to think about teaching in a new way. I became convinced that training could be something different from what I had experienced or practiced.

After completing my bachelor's degree, I enrolled in a master's degree program in Adult Education at UT. Dr. Peters led this program. By this time, Dr. Peters had become less inclined to lecture. Instead, he engaged the course participants in dialogue, a particular form of discourse in which participants contributed to the creation of new ideas. Soon, dialogue found its way into the manner in which I conducted facilitation. While enrolled in the master's program, I left TVA and accepted a position at the Oak Ridge National Laboratory (ORNL). There, I was responsible for conducting courses in safety and health topics. I actively sought and found many opportunities to incorporate what I had learned from Dr. Peters into my own facilitation.

After receiving my Master's Degree in Adult Education, I took a break from academics. I spent approximately 4 years working as a consultant with the Department of Energy (DOE)

safety and health organizations. I traveled across the country, facilitating groups at various DOE facilities. My prior experience facilitating dialogue was very helpful in this new role. After this assignment was over, I became interested in the Collaborative Learning (CL) Program led by Dr. Peters. I applied and was accepted into the program.

One important aspect of CL is the recognition that all individuals have experience and knowledge. My study of CL helped me create a new “way of being” when engaging others, whether in a training session or with a group working to solve problems. This new way of being included an enhanced awareness of the group environment and importance of dialogue. I also became more aware of how people learned, and the importance of reflecting on practice.

Discovering a new way of looking at teaching and learning. Dr. Peters’ model describing three types of teaching and learning (Peters & Armstrong, 1998) provides a perspective on how my practice changed as a result of participating in the CL program. Type I (T-I) is the traditional model of the teacher as an expert, or “teaching by transmission, learning by reception” (p. 78). The instructor lectures and passes on his or her knowledge to the students. Type I is appropriate when information needs to be transmitted to others. The instructor knows facts that students need to know. Type I places all control in the hands of the instructor and leaves no opportunity for participants to benefit from the experiences of other learners. At TVA I had been trained to conduct my courses primarily in a T-I fashion.

Type II (T-II) is more participative, but the instructor still retains control. Peters and Armstrong (1998) describe T-II as “teaching by transmission, learning by sharing” (p. 79). The instructor sets the agenda and guides the discussion, but participants have an opportunity to contribute. Type II provides participants an opportunity to contribute to a group learning experience. The ultimate control still resides with the instructor, who determines what is to be

learned and evaluates whether participants have succeeded in meeting the instructor's expectations or course objectives. Type II allows for more participant interaction but still maintains the instructor as the expert.

Type III (T-III) defines collaborative learning. Type III places the facilitator and participants on nearly equal status in "joint construction of knowledge, teacher as member of the group of learners" (p. 79). The group's members, including the facilitator, draw upon their personal experiences and inquire into the experiences of others. Together, they co-create knowledge through dialogue and develop a new understanding about the subject, not just accepting the facilitator's knowledge as the truth. I have experienced how collaboration can enable a group to learn about themselves and improve their practice. At this point in my practice, I pride myself in being a Type III facilitator.

UT-Battelle, F&O, and collaboration. The current phase of my career began in 2001 as the result of UT-Battelle, LLC, winning the contract to manage and operate ORNL. UT-Battelle completely changed the business model of managing and operating the laboratory's facilities and related infrastructure. The new business model was based on the concept of a landlord-tenant relationship. All buildings, utilities, roads, and grounds came under the management of a single organization. Previously, each research organization managed the facilities it occupied and was responsible for maintenance and improvements. The most significant impact of the new business model was that a new organization, the Facilities and Operations Directorate (F&O), became the "landlord" of the facilities with research organizations becoming "tenants." Laboratory leadership dictated the business model, but the specifics of how F&O would be structured and operated had to be created.

The F&O Directorate was formed, in part, based on a previous organization that provided only maintenance services. A majority of F&O's employees came from the former organization. The senior manager responsible for establishing F&O asked four of us (an F&O manager, two consultants, and me) to facilitate groups in collaboratively creating the new organizational structure. Our role included helping staff members create F&O's processes and define their new roles and responsibilities. In my opinion, we played a significant role in helping F&O become established. My experience with CL was critical in making the effort a success.

Following the early efforts of establishing F&O in 2001–2002, I became less collaborative in my approach to facilitation. I also observed that managers and supervisors in F&O became less collaborative in interacting with each other and with the employees they supervised. Soon after F&O was established, the senior manager who had engaged us in the restructuring process retired and many original managers and supervisors also retired or changed positions. Over time, the types of issues we needed to address also changed. The “creation” work ended, and the mundane work of managing an organization with ever-changing issues continued. I engaged groups in collaborative efforts less frequently, and the staff's way of interaction changed from collaborative to contributive. We changed from co-creating new ways of doing business to asking individuals to contribute their skills and knowledge in performing tasks.

Reflecting on Practice — DATA

Describe — What Was the Situation? At the time of this study, my primary responsibility was coordinating the training and professional development activities for managers, supervisors, and engineers within F&O. F&O had nearly 1000 of the ORNL's 5000

employees including approximately 600 union craft workers, 200 managers and supervisors, and other support staff.

In 2008, two colleagues and I developed and conducted a professional development workshop for supervisors and managers. In addition to helping participants with basic management skills, we hoped to return to a more collaborative facilitation method. We conducted the initial workshop over an 8-week period with one 2-hour session held weekly. We based the content of the workshop on a professional development program developed and marketed by Resource Associates Corporation (2008). The process combined personal and professional goal setting with self-reflective inquiry into aspects of managing and supervising. A member of our team, Dr. David Duncan, was a certified facilitator of the program. Duncan facilitated the initial workshop and I co-facilitated.

In the summer of 2009, I facilitated a second workshop, with Duncan co-facilitating. We lengthened the workshop to 9 weeks as a result of suggestions from the initial workshop participants. I was the primary facilitator. I wanted to provide the managers and supervisors with an opportunity to learn better supervisory skills, but I also wanted them to experience a new way of interacting. As I anticipated facilitating the course, I was aware that I did not have the confidence in my abilities that I had in 2002. I knew that I needed to redevelop my abilities to facilitate a collaborative learning experience if the workshop was going to be successful.

Analyze — What Accounted for the Situation? Even though I had facilitated shorter training sessions and group meetings, I had not facilitated a long-term and extensive program such as the professional development workshop since 2002. As a result, I had less confidence in my skills as a facilitator of collaborative learning. Further, I did not know what improvements were needed in my skill set. Finally, even though I felt the need to improve my facilitation

skills, I did not have the luxury of honing my skills before starting the workshop. I had to improve my skills while actually facilitating. If successful, I would improve my facilitation skills while also helping others improve their practice as managers and supervisors. I was faced with the question of how to accomplish both goals.

Theorize — What Could Improve the Situation? I had to improve my ability to facilitate while also conducting the workshop. Therefore, the manner in which I approached facilitation had to help me learn from the workshop experience itself. I needed to be able to evaluate how my actions as a facilitator influenced the workshop experience, and then be able to make decisions based on what I had learned.

Levelising framework. One aspect of collaborative learning involves engaging in “cycles of action and reflection,” performed by taking some action, reflecting on how the action influenced practice, and modifying future action from what is learned. The concept of cycles of action and reflection is similar to Argyris’ and Schön’s (1998) single- and double-loop learning. Schön (1983) calls the process “reflective practice.” Reflective practice serves as the basis for Peters’ (2002, 2005) “Levelising,” a framework for engaging in reflective practice.

Table 1

Description of Modes of Levelising from Peters and Ragland

Mode of Levelising	Description
Level I	• Sensitive to or in tune with surroundings • Focus on what one is doing or has done • Aware of others
Level II	• Consider actions • Remain in the situation • Occupy both observer and researcher viewpoint
Level III	• Aware of reflecting on actions • Aware of operating from conceptual framework • Try out different frames
Level IV	• Consider frames of others • Think about thinking • Consider how theories shape experience of the world • Construct new practical theories

Table 1 summarizes Peters' four reflective modes of Levelising (Peters, 2002; Peters & Ragland, 2005). In Level I mode, we are aware of what we are doing. We are also aware of what is going on around us. Peters refers to the Level I mode as "pre-reflective" (p. 1). While in this mode, we make no attempt to provide a reason for an action taken. It is similar to a landscape painter who is aware of what she sees before her while loading her brush with paint. She is aware of how the brush feels in her hand but does not question any aspect of the action.

In Level II mode we reflect on our action in the moment. In a Level II reflection, we might offer a justification for an action but without basing the reason on values or beliefs. We may also consider the immediate influences on our action. For example, the painter makes choices of how to mix the pigments to match what she observes. She bases her choice of colors to mix on her experience of how the different shades respond when combined. Assumptions, values, biases, or beliefs do not enter into the decision.

In a Level III mode, we expand our view of the situation and the influences informing our actions by considering our conceptual frames. Our conceptual frames are formed by assumptions, values, beliefs, and biases and influence how we perceive our experiences. These perceptions can be the basis for our decisions to act.

To illustrate Level III, imagine painting a landscape while looking through a window. Normally, we are not aware of the physical window frame surrounding our view. We only see the landscape, not realizing how the physical location, size, and construction of the window's "frame" restrict us to only one particular view. We develop our notion of the landscape through this frame. In our practices, as in other aspects of our lives, we act based on how we perceive a situation. Since our conceptual frames influence our perceptions, they also influence our actions.

In Level III reflections, we step back and consider the nature of the frame that forms our view. By stepping back and suspending the assumptions, values, beliefs, and biases making up our frames, we can better understand our actions. In suspending our conceptual frames, we do not set them aside or pretend they do not exist. Instead, we hold them up or "suspend" them in our view much like hanging a mobile made up of our assumptions as we engage in our practice and as we reflect on our actions. We also reflect on how well our conceptual frames serve us in understanding our world. We may form views or perceptions (i.e., conceptual frames) through this process.

In Level IV reflections, we consider the frames of others, compare our frames to theirs, and modify our frames, if needed, as a result of this comparison. We come to understand the uniqueness of our personal frames and become more sensitive to how others frame their world. We can never truly look at the world through another's frame. However, by inquiring into the assumptions, values, beliefs, and biases of others, we can become more aware of the differences

and similarities of our frames to theirs. If we become willing to be influenced by what we discover about the frames of others, we open ourselves to new possibilities. Through Level IV reflections we can discover new ways of perceiving the world and new approaches to practice.

To illustrate Level IV, consider the landscape example one more time. Imagine you are an artist and have just completed a painting of the aforementioned landscape. You have created what you believe to be a realistic picture of what you see before you. You included details as well as the “feel” of the environment. You are quite pleased with your work. You then look around and see other artists painting the same landscape.

You are curious about how the other artists have rendered the landscape. As you view the others’ paintings, you are struck by how strange they appear. Some paintings are similar to your own, but you notice that important details are missing. Some of the other artists added objects and details that are not in the landscape. Some paintings are abstracts, with no recognizable details of the landscape left intact.

You engage the artists in conversations about their paintings. They respond to your questions by describing their work, pointing to details in their paintings, and explaining how they came to produce their images. As each one responds to your questions, you begin to “see” the landscape emerge on their canvas. The image is not as clear as your own, but you begin to make out a recognizable landscape.

You reflect on your conversations while walking back to your easel. When you now look at your painting, it appears different. You are still comfortable with your painting, but when you compare your painting to the actual landscape, they both appear to have changed. You notice that you have left out some details. Your painting contains items that you do not see in the landscape. Some of the details are distorted. What has changed in your painting while you were

talking with the others about their versions of the view? Of course, nothing has changed in your painting. What has changed is the way you now see both the actual landscape and your painting after considering the frames of others.

Previous studies. Gaskin (2007), Torres (2008), and Duncan (2009) studied the use of Levelising and its influence on their practice. All three studies were focused on understanding how engaging in reflection through Levelising could be used to improve their respective practices.

In comparing my study with the other three, I notice that each of our studies of Levelising had a different setting, focus, and methodology. While our studies have many similarities, they also have a number of differences. Table 2 provides summaries of the three prior studies along with a summary of my current study.

Table 2

Comparison of the Aspects of Studies of Gaskin, Duncan, Torres, and Creekmore

Aspect	Gaskin (2007)	Duncan (2009)	Torres (2008)	Creekmore (2011)
Practice	Quality Management Director	Executive coach	Organizational consultant and trainer	Training and development coordinator
Purpose of study	Improve delivery of behavioral health services by training providers to reflect on their practice through Levelising	Investigate how to coach clients to engage in reflection through Levelising	Understand through Levelising actions needed to support sustainable transformational change in organizations	Improve ability to facilitate by reflecting on practice through the use of Levelising
Participants	Continuous Quality Improvement team	Coaching clients	Researcher and colleagues	Researcher
Methodology	Instrumental case study	Qualitative case study	Phenomenological study	Autoethnography
Data Collection	Team meetings (audio) Individual interviews (audio)	Coaching sessions (audio)	Participant interviews (audio) Teleconference transcripts On-line dialogue transcripts	Reflexive journal (data)
Data Analysis	Modes of Levelising (researcher and outside-raters) Thematic analysis Journal aided in thematic analysis and used in comparison of outsider-raters	Typological analysis Relationship of speech acts to modes of Levelising Journal used to aid in analysis	Thematic analysis Journal and transcripts used to add depth to interviews and identify examples	Formative analysis Summative analysis Thematic analysis Modes of Levelising Journal was the sole source of data
Research questions	1. At what levels in the Levelising model did participants engage during the study? 2. What difference did Levelising make in the participants' development of a CQI project? 3. What was each participant's experience of the meetings?	1. On which levels do coach and client engage during coaching sessions? 2. How is Levelising manifest in coach and client discourse?	1. What will be the nature of our experience of using Levelising in an on-line collaborative learning practice with a focus on the design and destiny of organizing? 2. How, if at all, will the iterative practice of Levelising in our on-line collaborative learning group relate to our understanding of the design and destiny process of the AI 5D cycle? 3. How, if at all, will the iterative practice of Levelising in our on-line collaborative learning group relate to our facilitation of the design and destiny process of the AI 5D cycle?	1. At what levels of the Levelising model did I engage during the study? 2. How did Levelising inform the decisions I made in attempts to improve my facilitation of professional development workshops?

Gaskin (2007) taught her colleagues to engage in Levelising in their practices that involved interaction with parents of at-risk children. The purpose of her study was to “. . . improve delivery of behavioral health services by training providers to reflect on their practice through Levelising” (Gaskin, 2007). She was facilitator, researcher, and manager of the participants in the study. She collected data by inquiring into her colleagues’ experiences through group interviews. Her interviews were recorded, transcribed, and analyzed.

Duncan (2009) attempted to lead others into the reflective modes of Levelising through questioning during one-on-one coaching sessions. Study participants were clients who had engaged Duncan as an executive coach. He did not teach his clients to reflect through Levelising. Rather, he engaged them in the experience of reflective practice with the intention of coaching them into more expansive reflection through Levelising. Duncan’s purpose for his research “. . . was to investigate how my executive coaching clients and I engaged in reflective practice through a model of dialogical interaction called Levelising” (Duncan, 2009, p. v). He recorded his coaching sessions, transcribed the audiotapes, and analyzed the data.

Torres (2008) studied the conversations and on-line dialogues of colleagues who shared her “competencies related to dialogical practice and . . . post-modern mindset” (Torres, 2008, p. 99). The purpose of her study was to “understand through Levelising actions needed to support sustainable transformational change in organizations” (Torres, 2008, p. 99). She analyzed the transcripts of eight on-line dialogues in which she and her colleagues participated. She was a participant/researcher in that she directly participated in on-line dialogues, and her interactions were recorded and included in the transcripts that were analyzed. Of the three studies, Torres’ most closely resembles my own in that she was directly involved in the reflective

process. Additionally, my own competencies related to dialogical practice and post-modern mindset could be considered similar to hers and those of her colleagues.

As with any practitioner, I espouse a personal philosophy and a set of assumptions, values, beliefs, and biases (i.e., a conceptual frame) through which I view my facilitation practice. My strong constructionist paradigm supports my belief that discourse between individuals co-creates reality, and discursive acts continually alter reality (Bakhtin, 1986). For example, in the course of the conversations in the workshop the group defined what being a supervisor or manager meant in their own practice. Individuals and groups engaging in discourse co-create meaning as they develop ways to work together. I feel that providing an environment where the discourse promotes positive relationships can help individuals become more effective in their personal and professional lives.

My ontological stance supports my constructionist paradigm. Although I admit to experiencing “oscillating ontologies” as described by Weick (1995, p. 35), from moment to moment I find myself acting from some established “truth.” However, I am willing to inquire into why I subscribe to the truth’s existence and remain open to be influenced to alter my perspective. I believe that meaning is co-constructed between others through discourse, but the perceptions of the individuals participating in discourse are not identical. Differences in perception may be influenced by our different experiences, our relationships with each other, our position relative to each other, and discourse surrounding our engagement (Creekmore, Duncan, Stulberg, & Peters, 2005; Weick, 1993). In addition to discourse shaping our perceptions, external and internal influences shape our discourse, thereby further shaping our perceived reality. Reflective practice provides a way to recognize differences in our perceived

reality during the moment of interaction and reveal the conceptual frames through which we view the world.

Epistemologically, I believe that I can only develop new knowledge while in relationship with an “other.” I cannot successfully seek out knowledge through methods that isolate me from the lived experience. I realize that my conceptual frame restricts my view of the world and that my assumptions, values, beliefs, and biases set the boundaries of my conceptual frame. To understand my conceptual frame, I need to step back and intentionally reflect on it. I also realize that, even though I seek to understand the frames of others, I can never know explicitly how others experience the world. However, by engaging others in dialogue and inquiry, a co-constructed understanding of our conceptual frames can be created. From this new understanding we are able to go on together (Wittgenstein, 1953).

Engaging in Levelising. I believed Levelising would provide a framework for expanding my reflection on my practice. Argyris and Schön (1978) describe single- and double-loop learning as an approach at reflective practice. Single-loop learning is reacting to an error by correcting a situation without reflection. Double-loop learning is correcting an error while reflecting on one’s conceptual frame and questioning the assumptions, values, beliefs, and biases that influence how we see the situation. They challenge the practitioner to examine the mental models that influence decisions for the purpose of aligning theory-in-action (how we act) with espoused theory (what we say believe). The Levelising approach calls the practitioner to explore her espoused theory, her theory in action, and others’ theories for the purpose of creating her own practical theory that best serves practice (Peters & Ragland, 2005). Therefore, I felt that Levelising provided a framework to reflect in a manner that would allow me to understand myself as a facilitator and allow me to make decisions to improve my practice.

Incorporating the self-reflective approach of Levelising into my practice offered an opportunity to heighten my awareness of my actions, my conceptual frames, and the frames of others. I expected no more than that. Wittgenstein (1953) captured this purpose as follows: “[we are not concerned with] hunt[ing] out new facts; it is, rather, of the essence of our investigation that we do not seek to learn anything new by it. We want to understand something that is already in plain view. For this is what we seem in some sense not to understand” (no.89). I believed that if I could observe my actions during facilitation and question my conceptual frame regarding those actions, I could make informed decisions to improve my practice. The Levelising framework guided my reflections on experiences and helped me to develop new perspectives and possibilities.

Act — What Did I Do to Improve My Practice? Beginning in June of 2009, I facilitated a 9-week professional development workshop. During the sessions, I attempted to provide a collaborative environment. This environment included encouraging dialogue, providing a safe environment for sharing ideas, testing ideas through action and reflection, and being sensitive to the ways the participants made sense of experiences. Peters (1999) identifies these as the four primary aspects of collaborative learning.

I engaged in Levelising as a way to become more mindful of my actions as a facilitator, surface assumptions behind my actions, and inquire into the bases behind my assumptions. I also wanted to understand how my perspectives compared with the perspectives of others. Following each session, my co-facilitator, observer, and I debriefed on what stood out for us. This provided an opportunity to reflect as a group and engage in Levelising through dialogue and questioning. I entered my handwritten reflections in my reflexive journal on my facilitation experience. I reflected on my actions, considered ways of improving my practice, examined the

nature of my reflections, and identified how I engaged in the modes of Levelising. I reread my reflections between each workshop session and made decisions about how to modify my facilitation approach.

Duncan co-facilitated and also participated in the groups' dialogue. Angela, a co-developer of the workshop, attended each session. She noted the group's suggestions for improving the workshop, corrected problems in materials, and observed the group's interaction, including my facilitation. Angela had extensive educational development and facilitation experience and was a PhD student in Organizational Psychology. She did not facilitate but participated in the debriefings that followed each workshop session. Over the 9 weeks of the workshop, Duncan, Angela, and I collaborated on revisions to the course content and facilitation approach.

The following chapters of this report provide the details of my study. In Chapter 2, Research Design, I address the second part of Peters' (2002) DATA-DATA action research model. I describe my research methodology including my research questions, data collection, and analysis. In Chapter 3, Results, I present the results of my analyses. My results include the the modes of Levelising I engaged in during my reflections and the nature of those reflections. I identify the number and nature of the decisions I made to improve my facilitation. Finally, I illustrate through a narrative how my experience of reflecting through Levelising informed my practice. In Chapter 4, Discussion, I explore my results and interpret their meaning in the context of my practice. I also compare the results of my study with three previous dissertations related to the use of the Levelising model. Finally, in Chapter 5, Summary and Implications, I provide my reflections on what I learned from my study and offer suggestions for subsequent research in reflective practice and Levelising.

Chapter 2: Research Design

In this chapter, I describe how I approached studying my practice. I begin by presenting my research questions, followed by a description of my research methodology and my justification for choosing my methodology. I then describe how I collected and analyzed data. Finally, I present my strategies for ensuring the validity of my research. The structure of my action research was Peters' second "DATA" of the DATA-DATA model, or *Design, Analyze, Theorize, and Act*. This chapter addresses the Design aspect of the model.

Research Questions

My action research focused on how engaging in reflective practice through Levelising informed my decisions to improve my facilitation practice. The context of the study was my facilitation of a 9-week professional development workshop. The research questions I sought to explore were the following.

1. At what levels of the Levelising model did I engage during the study?
2. How did [reflection through] Levelising inform the decisions I made in attempts to improve my facilitation of professional development workshops?

Methodology

My study was first person action research conducted as an autoethnography. Torbert (2001) says the following about first person action research.

If, to begin with, we try to bring just the first and simplest formulation of this question ('How may we inquire in the midst of the real-time actions of our daily lives?') into our daily lives, we immediately discover a fundamental difficulty. *We rarely remember to do so.* Moreover we don't really don't know what to do when we do remember. We rarely experience ourselves as present in a wondering, inquiring, 'mindful' way to our own action (250).

My research questions directly relate to my professional practice. Autoethnography provided what I considered a practical and effective approach to explore my practice from the

first-person perspective. Ellis and Bochner (2000) refer to autoethnography as “action research for the individual” (p. 754). Autoethnography, having been recognized as a research method for many years, is still considered by some as an emerging method. Ellis and Bochner (2000) contend that many different forms of autobiographical research should be considered autoethnographies. These forms include personal narratives, lived experience, critical autobiography, reflexive ethnography, and heuristic inquiry.

Autoethnography’s place as “real” research continues to be questioned. Denzin and Lincoln (1994) observe that even when well-established qualitative research methods are used, researchers are continually asked to defend their methodologies as valid science or research. It has become accepted for a researcher to include reflections on how he or she may have influenced the outcome of a study due to their presence or interactions. However, when a researcher engages in self-inquiry and these reflections become the subject of the research, it challenges the conventions of what is considered authentic research (Wall, 2006).

The practitioner-researcher’s ability to maintain the objectivity necessary to provide an autoethnographic account that is accurate and complete remains an issue, by some. However, Atkinson (2007) argues that observers are always implicated in what they are observing, interviews are co-constructed between interviewer and interviewee, and the final account is in terms of some “convention” (Atkinson, 2007, p. 402). Mykhalovskly (1996) points out that critiques of “neutral” or “universal” social science writing by postmodernists claim that the “abstract, disembodied voice of traditional academic discourse was a fiction accomplished through . . . removing evidence of the text’s author” (p. 134).

Wall defends autoethnography’s appropriateness within the postmodern research environment:

The essence of postmodernism is that many ways of knowing and inquiring are legitimate and that no one way should be privileged. “It distrusts abstract explanation and holds that research can never do more than describe, with all descriptions equally valid . . . [Any] researcher can do no more than describe his or her personal experiences” (Neuman, 1994, as cited by Walls, 2006, p. 2).

In my own action research, autoethnography provided a way to take a direct look at my actions, with the intent of improving my practice. Through an autoethnographic approach, I could provide a situation-specific account of engaging in reflective practice through Levelising. A first-person narrative seemed to be the clearest way of communicating to the reader what the reflection experience was like for me cognitively, emotionally, and even physiologically. The autoethnographic approach allowed me to easily incorporate the reflective modes of Levelising into the action research protocol.

Embarking on first-person action research presents a challenge. Marshall (2004) warns that the researcher and reader can hold an unrealistic assumption of a “stable and coherent” self that is embodied by the researcher (p. 2). Since we recreate relationships in the living moment of interaction, stability and coherency cannot be expected. Since few people attain any significant level of self-reflection, a certain level of “incompleteness” must be accepted in any self-reflective account (Marshall, 2004, p. 2). Therefore, I cannot claim that I saw all that occurred in the sessions, or that I was aware of all my actions.

As a practitioner/researcher I had to attempt to remain acutely aware of the relationships within the group. DeGuerre (2002) describes the researcher as “walking a thin line as insider-outsider attempting to avoid the pitfalls of both. A pure insider is too caught up in the action to practice reflexivity and a pure outsider is not close enough to understand what is really going on” (p. 333). De Guerre sees the task of the researcher in this situation as “managing relations between one’s perception of self and perception of ‘the other’ (p. 333).” Managing perceptions

was challenging, indeed. However, the framework and the discipline characteristic of Levelising helped me manage these perceptions.

Data Collection

In this section I describe my methods for collecting the data used for my analyses. I identify the source of data, the method for recording data, and the justification for choosing my approach.

Actions to Reflections. My data collection method was informed by Cunliffe's (2004) and Duncan's (2004) approach to reflexive practice. Cunliffe uses the term "critical reflexivity" to describe the way she examines her practice. She defines critical reflexivity as "... writing as an involved insider, from a prospective stance, questioning assumptions and taken-for-granted ways of acting and thinking" (p. 420). She explains that journaling in a critically reflexive manner requires an awareness of "... our assumptions, our ways of being and acting, and our ways of relating" (p. 418). Cunliffe's suggested use of journaling to critically reflect offered a sensible approach to self-inquiry and was applicable to my study.

I chose to follow Duncan's and Cunliffe's examples of keeping a reflexive journal to capture my observations and reflections on what occurred during the workshop sessions. Immediately after each weekly session, I entered my handwritten observations and reflections in my journal. The journal entries served as the data set for this research. Recording my reflections in my reflexive journal immediately after each session, and having my journal entries available for review between each session, supported my engagement in cycles of action and reflection. While entering my reflections into my journal, I intentionally attempted to engage in each of the four modes of Levelising. I inquired into my facilitation by challenging my actions and maintaining a self-reflective and self-critical approach.

I chose to use my handwritten journals as data instead of audio recording each session. From my earlier experiences, recording conversations during the sessions would have interfered with my goal of establishing a safe and open environment for dialogue. I wanted everyone to speak openly and have confidence that what was said would not be shared outside the room. In the past, I have gathered data for other purposes by recording interviews with staff members. I have personally experienced how recording interviews can have a negative impact on the openness of the people being interviewed. For example, a manager once explained very frankly that his response to questions would depend on whether, or not, the interview was recorded.

Audio recording the workshop sessions was also impractical because of the logistics involved. At least ten people would be attending each session. Over the 9 weeks, the sessions would be held in different meeting rooms with different configurations. The size and layout of larger meeting rooms would make controlling the quality of the recordings difficult.

Most importantly, my study focused on my reflective process. Therefore my personal reflections on what occurred in the sessions provided a more relevant data set, and reflecting by journaling presented the most authentic method for collecting that data.

Duncan (2004) described the following four purposes served by her journal.

1. Externalize assumptions and reactions to people and events that might otherwise remain unacknowledged.
2. Crystallize ideas and capture the inner dialogue of the facilitation and reflection process.
3. Define and resolve inner conflicts.
4. Provide a record of turning points in the evolution of understandings and concepts, contributing to the maturation of ideas and the eventual emergence of a practical theory. (Duncan, 2007, p. 6)

My journal served similar purposes in studying my practice. My journal entries included my facilitation experiences, debriefs with peers, and personal reflections on my practice.

Journaling immediately after each session, I was able to provide detailed descriptions of moments that stood out for me. I remained mindful while writing in my journal that no other record of the sessions would be available for review. This compelled me to relate detailed reflections and descriptions of the interactions in the sessions. I captured how experiences affected me emotionally, physically, and cognitively.

Participants

Conducting first-person action research as an autoethnography positioned me as the primary participant. However, workshop participants were also included in my reflections on interactions during sessions. Clandinin and Connelly (2000) point out that even though the autoethnographic method positions the researcher as the primary subject and storyteller, others who enter into the story deserve to be treated with respect and have their privacy protected.

Ellis also points out the following.

When we write about ourselves, we also write about others. In so doing, we run the risk that other characters may become increasingly recognizable to our readers, though they may not have consented to being portrayed in ways that would reveal their identity; or, if they did consent, they might not understand exactly to what they had consented (Ellis, 2007, p. 14).

I was careful to protect those who consented to participate in my study. During the first session of the workshop, I explained to the participants my intent to use the workshop as the context of my study and their role in the research. I also described the methods I would take to ensure their anonymity. I assured them that participation was voluntary and that they could remove themselves at any time. All course enrollees agreed to participate and, subsequently, read and signed confidentiality disclaimer forms. A copy of my confidentiality disclaimer form is provided in Appendix A. To protect the identity of the course participants, I referred to each person by a pseudonym in my journal and this report.

One exception was made in using a pseudonym. Dr. David Duncan's role in my study is very different from the others. Specifically, he co-developed the workshop, co-facilitated the sessions, collaborated with me to categorize my reflections by modes of Levelising, reviewed my results, and provided feedback in the development of this report. Also, I reference his research several times in this report. Using a pseudonym to identify him in one case and then using his actual name in another would be confusing for the reader. With his permission, I refer to him as "Duncan," a nickname used by his colleagues. Table 3 provides the list of pseudonyms and general description of each individual's position or role in ORNL.

Table 3
Pseudonyms for Individuals Referenced in Data

Pseudonym	Position / Role
Stanley	Middle Manager
Pam	Project Manager
Erin	Administrative Staff
Ryan	Supervisor
Andy	Front-Line Supervisor
Meredith	Operations Manager
Kevin	Facility Engineer
Jim	Project Manager
Michael	Senior Manager
Toby	Human Resource Manager
Duncan	Co-Facilitator / Colleague
Angela	Observer / Colleague
Holly	Colleague

The workshop was announced through an organization-wide email. Participants enrolled in the course through a web-based training management system, the normal process for enrolling in any training at ORNL. The fact that the workshop would serve as the context for my research was not mentioned in the announcement. No screening of the participants took place. The group was diverse in several ways. Differences included their positions, age, time at ORNL, and gender.

Analysis

In this section, I describe my data analysis processes. My analysis approach was informed by Duncan (2004), Chang (2008), and Maxwell (1996) and included two types of analyses. Figure 1 illustrates the sequence and steps involved in my study. As Figure 1 shows, there were two types of analyses. The formative analysis was performed as I entered my reflections into my reflexive journal and as I reread my reflections between each session. My complete set of journal entries became the data for the summative analysis that followed. The summative analysis consisted of three phases. I identify these phases as *splitting the context*, *re-totalizing the context*, and *reframing practice*. The final result of my analyses identified the decisions I made to improve my practice.

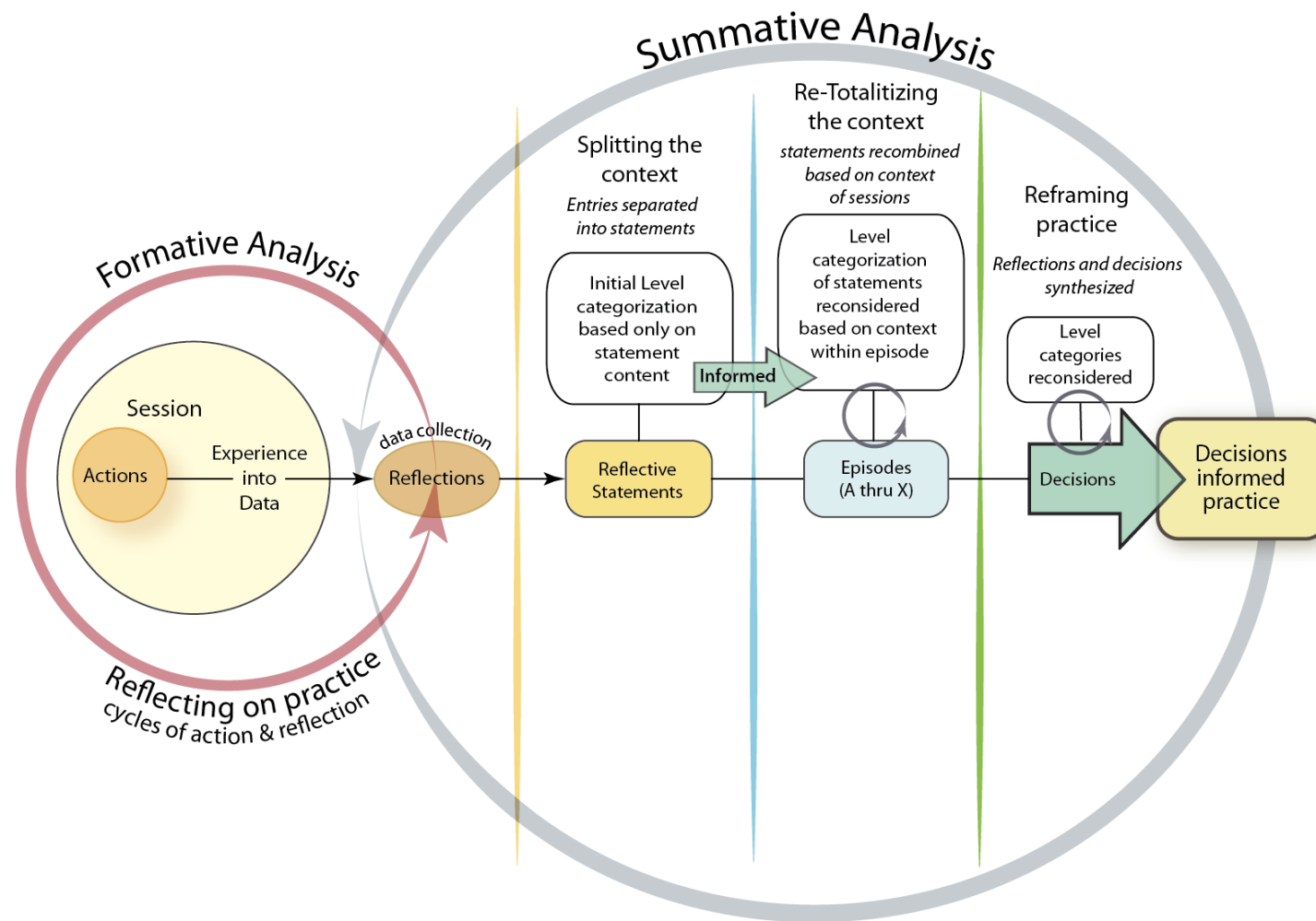


Figure 1. Research Methodology

Formative Analysis.

I conducted my formative analysis by reading through reflexive journal entries of prior workshop sessions. The reading took place just before each session (except the first one) and involved two phases. I first read the journal entry from the previous workshop session. Then I read the journal entries for all previous workshop sessions in the sequence in which they were developed. This body of material grew by one journal entry each week and was read in one sitting. The primary purpose of the formative analysis was to consider changes that would improve my practice that I could implement, either while the workshop was in progress or after the workshop. During the formative analysis phase, I made decisions to change my practice based on my reflections in the four modes of Levelising. Such decisions, whether to take immediate action or to work on issues that needed time to resolve, were directly informed by what I learned while engaging in Levelising.

Chang (2008) justifies the sequential process of reading and analysis. “You enter into a research project with the pre-knowledge of your life. Therefore, you are predisposed to begin connecting data fragments and contextualizing them without having to wait until data collection is advanced” (p. 131). Described as segmental reading (Chang, 2008, reviewing my entries also provided an opportunity to consider if I was reflecting in all modes of Levelising. Therefore, during the formative analysis, I was able to modify both my practice and my reflective approach.

During my reading of the journal entries, I also considered my reflections on previous sessions. Duncan (2004) describes the formative analysis as an example of what Schön (1987) calls “knowing in action” and “cycles of action and reflection.” Duncan refers to this analysis as formative because practice changes as a result of what is learned through this process. Duncan’s

purpose of performing formative analysis was “. . . to apply understandings as they emerged, thereby changing the objects of experimentation. . . In this way, the analysis can be considered constructive and differs from the type of analysis conducted by researchers who remain outside the situation they are investigating and who have no opportunity to create change directly in the research setting” (p. 7).

My data collection and formative analysis occurred during the same time frame. Each one influenced the other as the workshop progressed through the 9 weeks. As Maxwell (1996) explains, “the experienced qualitative researcher begins data analysis immediately after the first interview and observation, continues to analyze the data as long as he or she is working on the research” (p. 95). As Maxwell claims, my analysis not only took place in the early stages of data collection and analysis but also continued even into the final stages of writing this report.

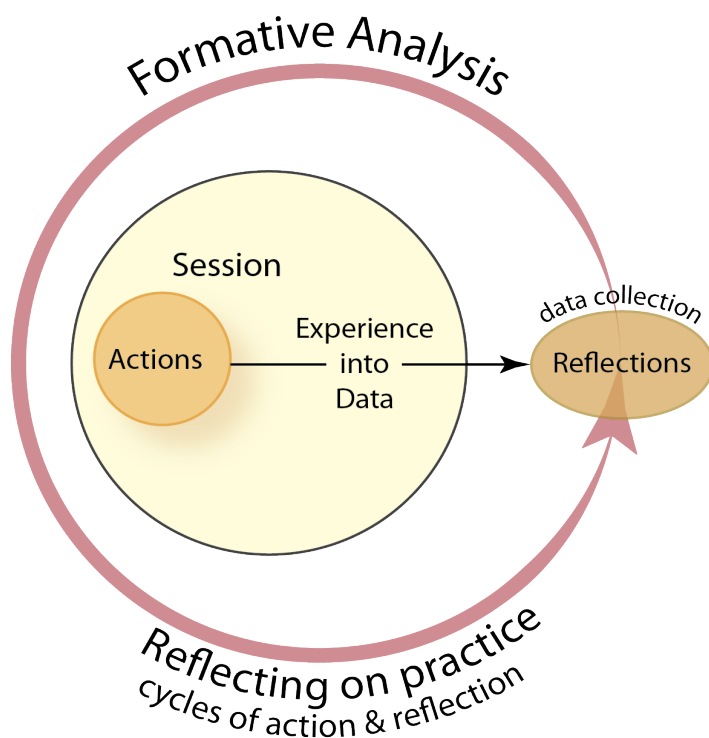


Figure 2. Formative Analysis

Figure 2 illustrates the formative analysis process. I reflected on the actions that stood out for me during the sessions and recorded my reflections in a reflexive journal. Journaling converted my experience of the workshop into data. My reflections on practice and decisions I made to modify facilitation allowed for cycles of action and reflection. Any changes I made to my facilitation as a result of my reflections informed how I facilitated in subsequent sessions.

Summative Analysis

After all of the workshop sessions' journal entries were completed, I began my summative analysis using the journal entries as my data set. Figure 3 illustrates the summative analysis.

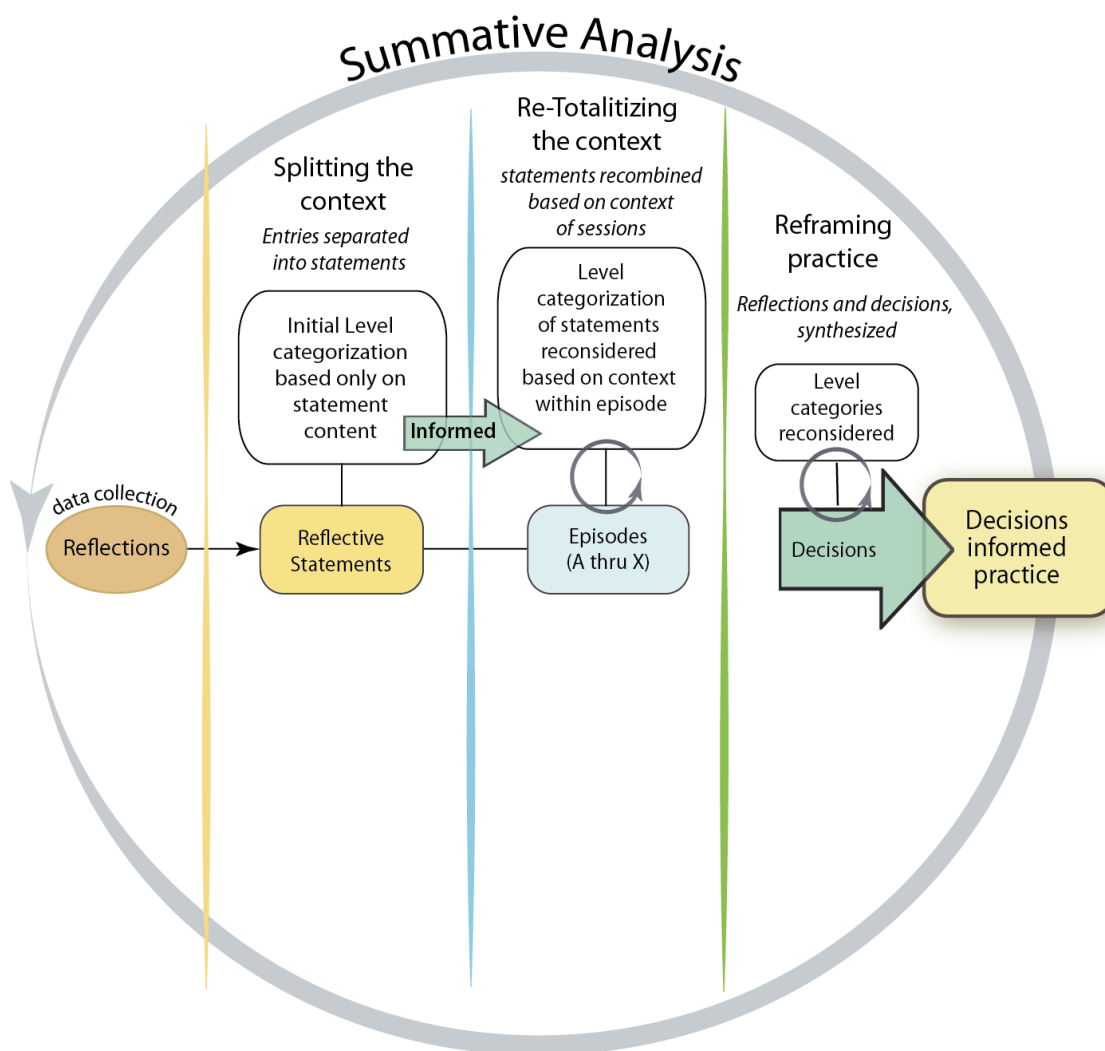


Figure 3. Summative Analysis

I performed the analysis in three phases. I referred to the phases as *splitting the context*, *re-totalizing the context*, and *reframing practice*. I credit Paulo Friere (1987) for inspiring the names of the first two phases. In the following sections, I describe the phases and the steps involved in completing each.

Splitting the context. Prior to beginning my summative analysis, I converted my original reflexive journal entries into a more manageable format for analysis. Table 4 lists the

steps I followed in splitting the context of the data. After my formative analysis, my data initially consisted of my handwritten reflections contained in my reflexive journal. To aid in analysis of my reflections, I transcribed my journal text into an electronic file (Microsoft Word). To begin my summative analysis, I read the reflections I had written in my reflexive journal for each workshop session. I then separated my reflexive journal entries into meaning units. Tesch defines a meaning unit as “a segment of text that is comprehensible by itself and contains one idea, episode, or piece of information” (Tesch, 1990, as quoted in Cote et al., 1993, p. 131). I define a meaning unit as a sentence or sentences that convey a single reflective act or statement. To better describe the meaning units within the context of my study, I refer to them as “reflective statements.” I entered the reflective statements into an electronic database (Microsoft Excel) and coded each statement with a unique identifier.

Table 4

Splitting the Context of the Data

Steps	Actions
1.	Transcribed handwritten journal entries into database
2.	Divided journal entries into reflective statements (meaning units)
3.	Assigned Levelising mode (I, II, III, or IV) to each reflective statement

Next, I assigned each statement a mode of Levelising based on Duncan's criteria (2009). I provide a summary of Duncan's taxonomy in Appendix B. During this initial categorization, I read each reflective statement and considered only what the statement said, not how it might gain meaning from the context of the overall entry. After I had completed my initial categorization, I enlisted Duncan's assistance in reviewing the mode of Levelising I had assigned to each statement. Duncan and I met and reviewed my categorization and agreed upon a mode of Levelising for each reflective statement.

Re-Totalizing the context. Statements read out of context lose their relatedness to the flow of the experience. Placing the reflective statements back into the context of a particular situation or episode informed my interpretation of the meaning of the statements. I adopted Erickson's definition of an episode: "vivid portrayal of the conduct of an event of everyday life" (Erickson, 1986, as quoted in Humphries 2005, p. 842). An episode results from a situation (e.g., conversation, action) that stood out for me during a workshop session.

Maxwell's (1996) suggestion that data be mapped in order to enable "seeing" how the reflective statements related both to one another and to the whole episode proved to be a breakthrough in my ability to understand my reflections. Guided by concept mapping techniques described by Wheeldon and Faubert (2009), I mapped my data. I began by copying each reflective statement from a workshop session onto a separate sheet of a self-stick note pad. I arranged each sheet on a whiteboard, based on how the reflective statement written on it related to other statements in such aspects as the topic of the statement, purpose of the statement (e.g., to question, to explain), or if the statement revealed a decision. Next, I drew lines on the whiteboard between the statements to indicate direct connections, breaks in topic flow, and decisions. During this process, I grouped the statements into episodes if they shared a common

focus. Finally, I converted each whiteboard map into an electronic drawing. Table 5 lists the steps I took to re-totalize the context of the data.

Table 5

Re-Totalizing the Context of the Data

Steps	Actions
<i>Brought reflective statements back into context of experience</i>	
1.	Identified reflective statements related to common topic
2.	Developed concept maps with self-stick pads and whiteboard
3.	Converted concept maps into electronic graphics
<i>Refined categorization of modes of Levelising</i>	
1.	Read the reflective statements within the context of episodes
2.	Reconsidered mode of Levelising categorization of reflective statements
3.	Recategorized statements (as needed)
4.	Revised mode of Levelising categorization criteria

While mapping the episodes, I reconsidered the mode of Levelising assigned each reflective statement, and I revised many of the modes previously assigned to reflective statements. I also became aware that the categorization criteria I was using, which were based on Duncan's discourse patterns (2009) and useful in my initial categorization, did not completely address all the contents of my reflective statements. By building on Duncan's discourse patterns, adapting Peters and Ragland's Levelising descriptions, and incorporating what I found while reading my data, I developed a revised set of categorization criteria. My revised categorization criteria more closely matched the characteristics of my reflective statements. I then assigned modes of Levelising based my revised categorization criteria.

Reframing practice. I began the final phase of my summative analysis by identifying reflective statements that described decisions. I considered a statement to be a decision if it met one of three criteria: 1) described my decision to take immediate action; 2) showed my resolve to change my perception or conceptual frame; or 3) indicated an awareness of my need to resolve an issue. After the decisions were identified, I performed the final review of the mode of Levelising assigned to each reflective statement. A small number of statements were re-categorized during this phase. Based on the data, I was able to address my first research question. Table 6 lists the steps of the reframing practice phase of my summative analysis.

Table 6
Reframing Practice

Steps	Actions
<i>Identified and categorized decisions</i>	
1.	Reviewed each episode map
2.	Identified decisions statements based on decision criteria
3.	Recategorized statements by modes of Levelising (as needed)
4.	Identified decisions by modes of Levelising
5.	Identified decisions by episode within each mode of Levelising
<i>Identified modes of Levelising of all reflective statements</i>	
1.	Sorted reflective statements by episodes
2.	Identified modes of Levelising for statements in each episode
3.	Identified distribution of modes of Levelising across all episodes
4.	Searched for patterns in modes of Levelising related to making decisions
5.	Searched for trend in modes of Levelising chronologically during workshop
6.	Searched for apparent hierarchy related to engaging in modes of Levelising

After identifying the decisions and assigning each reflective statement to a mode of Levelising, I also identified decisions according to their mode of Levelising. Then, to illustrate how engaging in Levelising during reflective practice informed the decisions I made to improve my facilitation, I developed a narrative of a single workshop session. The narrative was written based on my reflexive journal entries. My intent for developing the narrative was to synthesize what I learned through the formative and summative analyses. The writing process of creating the narrative revealed how I frame my practice through my assumptions, values, beliefs, and biases related to practice.

Validity Strategies.

As a test of the validity of my research, I followed the four criteria described by Lincoln and Guba (1985) in evaluating the validity of qualitative research. These criteria are credibility, transferability, dependability, and confirmability. Credibility is based on the participants' consideration of the believability and relevance of the data. I addressed this by involving a second person in the review and analysis of my reflective statements and episodes. To be transferable, a study must provide an adequate description of its context and the researcher's assumptions so that others can replicate the study and assess the transferability of the results. I documented my personal background, the context of my study, method of data collection, methods of data analyses, and approach to interpreting my results. This chapter provides sufficient detail to satisfy this criterion. Action research, with its focus on practice, is conducted in an ever-changing context. To be dependable, the researcher must account for this dynamic context. My reflexive journal, along with my formative analysis approach, provided a detailed account of the changes in the context of the study, what I learned, and my approach to acting on what I learned. Confirmability refers to confirmation and corroboration from others regarding the research results. I addressed this by frequent meetings with the second person who reviewed and helped analyze my reflective statements and episodes, as well as and other graduates of the Educational Psychology and Research program. They were knowledgeable in the process of action research, reflective practice, and the context of the study.

Chapter 3: Results of Analysis

In this chapter, I report the results of analyses of my reflexive journal, addressing the *Analysis* phase of the second half of the DATA-DATA model. I begin by presenting the products of each analysis. These include the product of my formative analysis and each of the three phases of my summative analysis. Reporting in this manner illustrates how the formative analysis influenced the summative analysis. This also illustrates how each phase of my summative analysis enabled me to answer my research questions.

The next two sections synthesize the results of my data analysis to address my research questions. I begin by addressing my first research question. “At what levels of the Levelising model did I engage during the study?” I provide the results of my analysis that describe the extent of my use of Levelising in my reflective process.

I follow by presenting results to answer my second question: “How did Levelising inform the decisions I made in attempting to improve my facilitation of a professional development workshop?” To address my second question, I present my results in two forms. First, I discuss the decisions made and how Levelising informed those decisions. Then I illustrate, through a narrative, how engaging in Levelising informed my decisions to improve my facilitation practice. The narrative describes my experience of facilitating one session of the workshop and synthesizes my formative and summative analyses results.

Product of Formative Analysis

The results of my formative analysis took two forms. The first was my handwritten reflexive journal entries comprised of statements, questions, and decisions that captured my reflective process. As an example, I provide my journal entry of session four in Appendix C. The second form was decisions made during my facilitation of workshop sessions or during the

act of entering my reflections. Decisions that resulted from my formative analysis are described in the results section for research question two.

Results of Summative Analysis

Results of the Summative Analysis are described below in terms of the three phases: splitting the context; re-totalizing the context; and reframing my practice.

Splitting the Context. Figure 4 illustrates this phase of the summative analysis.

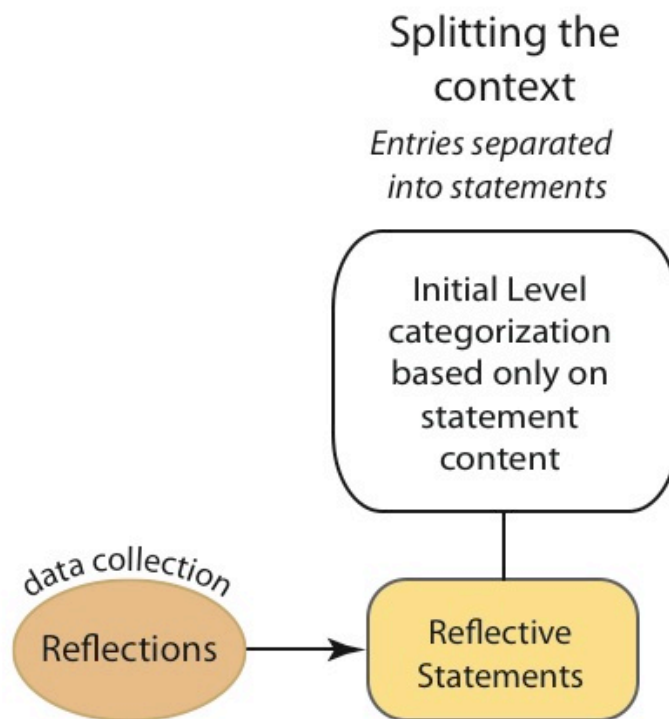


Figure 4. Splitting the Context

Splitting the context involved converting my reflexive journal entries into manageable data. I separated my reflexive journal entries into reflective statements ranging in length from one sentence to several sentences. This resulted in 358 individual reflective statements. The individual statements were then categorized by mode of Levelising.

Re-Totalizing the Context. After splitting the context, my data set consisted of 358 reflective statements. Re-totalizing the context involved reassembling the reflective statements with common focus into episodes related to my decisions, or moments that stood out or were surprising to me. Figure 5 illustrates the activities that comprise this phase.



Figure 5. Re-Totalizing the Context

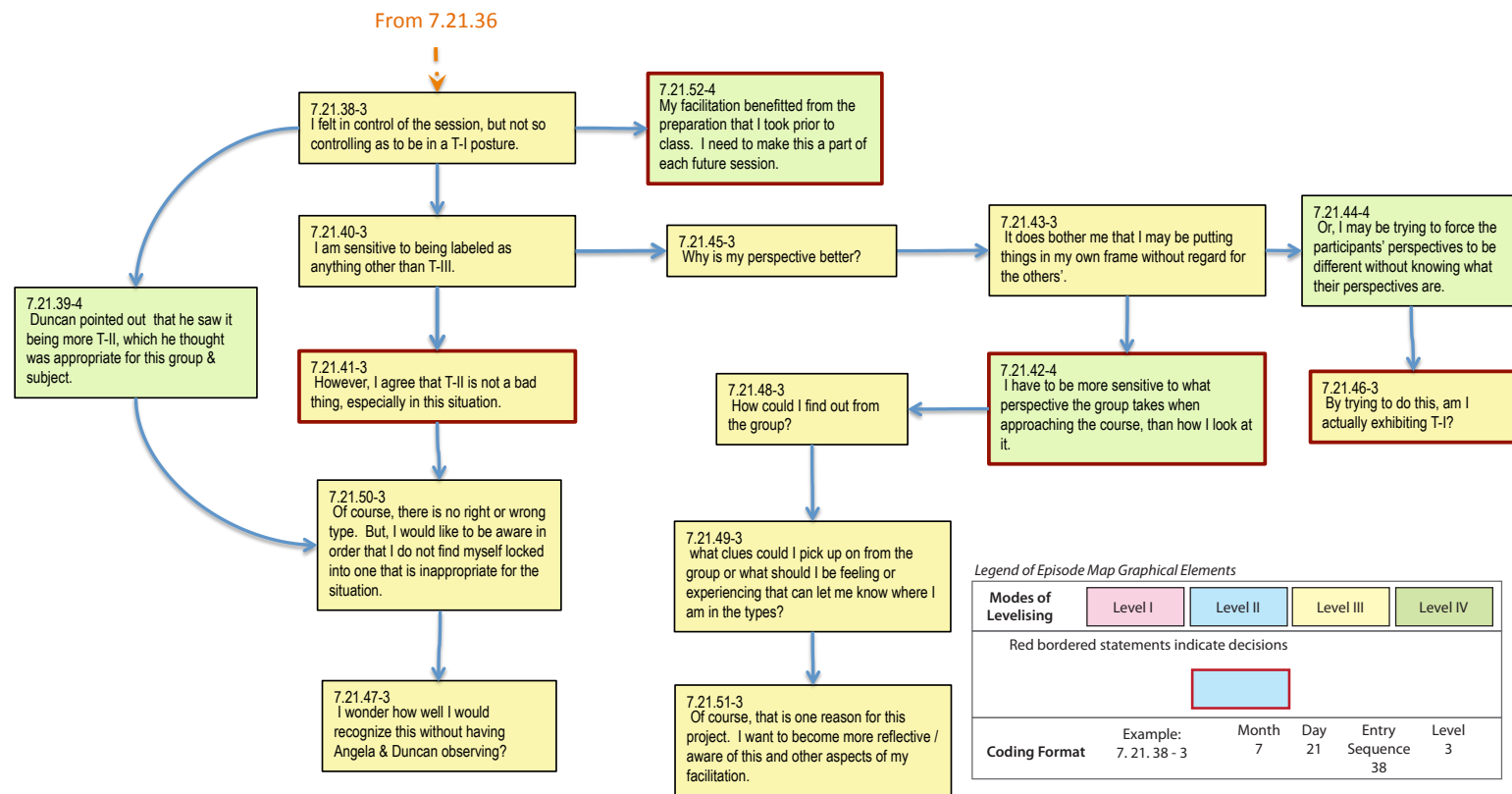
Upon completing this phase of my summative analysis, I had identified 24 episodes (A through X) that represented notable events from my reflexive journals. Episodes ranged in length from 7 to 34 individual reflective statements. I developed maps of each episode to provide a visual illustration of the relationships between the reflective statements. An example episode map is shown in Figure 6.

Placing the statements into episodes reestablished the relationships between reflective statements. Viewing the reflective statements in context of episodes led me to recategorize many of the modes of Levelising assigned earlier. This process also demonstrated the need to revise the categorization taxonomy used so that it was more appropriate for my data set. Table 7 illustrates my revised taxonomy for categorizing reflective statements by modes of Levelising.

Table 7

Mode of Levelising Categorization Taxonomy

Level	Reflective Statement Characteristics
I	• Describes actions • Sets context of situation • Provides facts
II	• Describes nature of actions • Describes non-frame-related feelings • Focuses on technique, materials, or logistics
III	• Focuses on personal frames (values, beliefs, biases, or assumptions) • Focuses on internal considerations • Reflects on how (personal) actions affect others
IV	• Focuses on frames of others • Questions how others perceive • Considers new approaches to practice



Episode L (2 of 3)

Figure 6. Example Episode Map (Episode L 2 of 3)

Figure 6 is the map of one of three episodes that I reflected upon in session four. A reflective statement from an earlier episode (7.21.36) marks the beginning of the episode. I begin by noting that I felt in control but not in a “T-I posture.” I immediately note that preparing beforehand was beneficial, and I decide to prepare for future sessions (7.21.52-4). However, Duncan points out that he sees the session being conducted as T-II and that he feels that T-II is appropriate. I agree that T-II is not bad, a decision I came to after realizing I am sensitive to being considered anything but a T-III facilitator (7.21.40-3).

Recognizing of my sensitivity leads me to ask myself why I think my perspective is better (7.21.45-3). This question leads me to reflect on my bias towards T-III teaching and learning. I realize that I am forcing my own values and biases onto others without taking the time to consider how they might best learn. I decide that I have to consider the perspective the group attending a course takes toward learning, instead of my perspective.

For me, the hardest realization that came from this episode was when I realized that by forcing a T-III teaching and learning approach on others without considering their perspectives, I was actually taking a T-I posture (7.21.46-3).

Reframing my Practice. After the Re-Totalizing the Context phase, the data consisted of 358 reflective statements organized into 24 episodes. Data analysis performed in the Reframing my practice phase directly addressed my second research question, “How did [reflection through] Levelising inform the decisions I made in attempts to improve my facilitation of professional development workshops?”

Figure 8 illustrates the final phase of my summative analysis. This last phase included

1. Reconsidering the reflective statements’ modes of Levelising for the final time
2. Developing a list of decisions from the reflective statements.

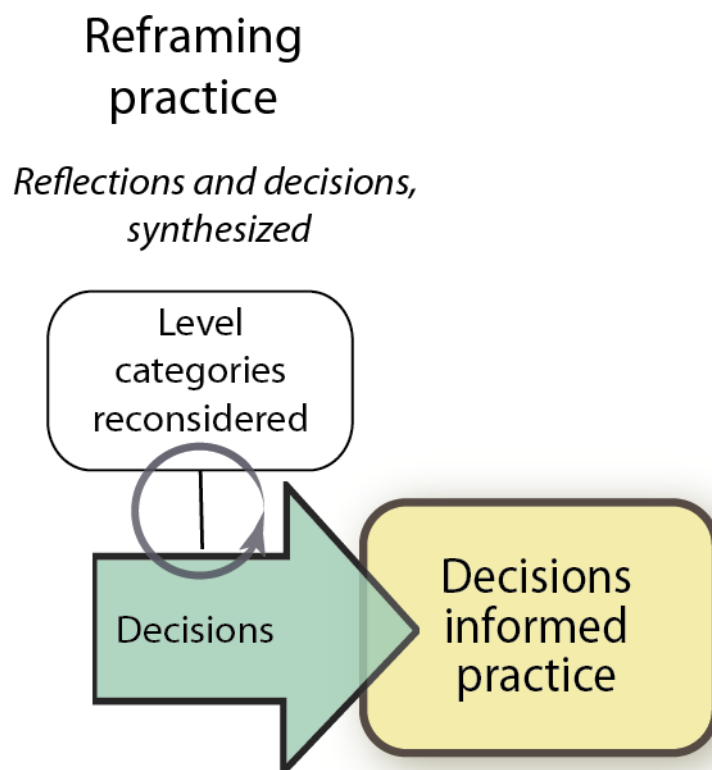


Figure 8. Reframing Practice

Research Question One Results

At what levels of the Levelising model did I engage during the study?

Addressing my first research question required more than just a simple count of reflective statements categorized by modes of Levelising. As described previously, reaching the final categorization was the result of an iterative process. As the data were reorganized, reformatted, and reconsidered, the mode of Levelising assigned to a reflective statement could change, and in many cases did change. The final categorization of the modes of Levelising was the last step of the summative analysis. Table 8 provides the number of reflective statements categorized in each mode of Levelising by total and by percentage.

Table 8

Number of Reflective Statements by Modes of Levelising

Mode of Levelising	Level I	Level II	Level III	Level IV
Total Reflective Statements	60	73	139	86
Percentage of Total	16.8%	20.4%	38.8%	24.0%

Level I statements. I identified a total of 60 Level I statements, or 16.8% of the total. Level I statements described or set the context of a situation and provided specific facts. The following journal entry is an example of a Level I statement. “I began the session by giving everyone an opportunity to read/reread the chapter for this week.” The statement is an example of action without reflection.

Level II statements. I identified 73 Level II reflective statements, or 20.4% of the total. Level II reflections exemplify “reflection-in-action” and “reflection-on-action.” Level II reflective statements focused more on action related to aspects of facilitation but did not inquire into assumptions, values, beliefs, or biases. Level II reflections focused on such matters as technique, course materials, or the logistics of the course. The following reflective statement is an example of reflection-in-action. “I found myself looking for a person in the group that could be relied on to add openly to the conversation.” Reflecting on action, I wrote in my journal “I may have spent more time on them at the expense of others.” My Level II entries were in the form of statements or questions, focusing on some aspect of a situation or my actions. In my Level II reflections, I analyzed my actions, justified my actions, or stated a decision.

Level III statements. I identified 139 Level III reflective statements, or 38.8% of the total. Level III reflections considered more personal aspects of my facilitation, including the conceptual frames through which I see the world and how these frames influenced my

facilitation. They also included the consideration of how my actions might affect others. Some Level III reflections referred to classroom situations such as the following example of using teleconferencing in a session. “I am never comfortable on teleconferences. It seems like a very isolating way to interact.” Level III reflections also explored more fundamental beliefs, as in the following statement: “I have espoused the notion that the group has answers to their own issues, and trying to be the expert is counter to my goal of having them realize their expertise.”

Level IV statements. I identified 86 Level IV reflective statements, or 24.0% of the total. Level IV reflections acknowledged that others saw a situation from their own unique perspective or frame, as in the following example, “The significant difference I see in how their frames are affected is by the amount of the ever-present ‘milieu’ of different messages that influence how their views are shaped. This can be heard in their comments.” Level IV reflections also raised new possibilities, as in the following example where I considered including an F&O senior manager as a workshop participant. “How could bringing him into the conversation reveal his ideas related to expectations or importance of engaging employees? What could he learn from others through the conversation?”

Considering the distribution of the reflective statements and their modes of Levelising, the following can be noted. Level I reflective statements were the least represented (16.8%). Only 20.4% were Level II statements. The largest percentage (38.8%) were Level III reflective statements. Over half (53%) of the reflective statements were Levels III and IV.

Research Question Two Results

My second research question is: *How did Levelising inform the decisions I made in attempting to improve my facilitation of professional development workshops?*

Addressing question two required understanding how my reflection during this study informed my practice. To answer question one, I described my analysis process and reported results in such terms as the numbers of statements, distribution of the levels of reflective statements, and so forth. However, to answer my second question, I adopted a holistic perspective that acknowledges the relationship between the formative and summative analyses. The cyclical process of my formative analysis affected my facilitation from one session to the next. Therefore, decisions made during the formative analysis were incorporated into reflective statements contained within my reflexive journal for the next session.

To answer research question two, I reviewed decisions I made to improve my facilitation. As I described earlier, I identified decisions as reflective statements that met one of the following three criteria: Described a choice to act, either immediately or imminently; showed a resolve to change how I perceived some aspect of facilitation; or posed questions that challenged either my actions or the way I perceived a situation, and indicated my awareness of the need to come to a resolution of an issue. Examples of each type of decision are presented below.

I decided to prepare for the sixth workshop session by conducting a one-on-one practice session with Angela. This was an example of a decision that I acted upon immediately. An example of a decision that indicated a resolve to change how I perceived facilitation was my acceptance of the notion that not every situation lends itself to a Type III teaching and learning style. Although it may not be immediately apparent, my decision to change my perspective on Type III teaching and learning will result in subtle changes to the way I facilitate over time. An example of a decision that was left as a question to be resolved was my facilitation of a particular exercise the workshop participants were asked to complete. The striking difference in my perception of the exercise compared to the participants' left me "perplexed." I was left confused

and wondering “how to go on with what I just learned.” I considered an initial approach that might help me “make sense of it,” but ultimately left it with the idea that “I have to try” even though I am not sure how.

To identify decisions in my reflective statements, I read through each episode map and identified the decisions based on the three criteria. I then reread each episode and reconsidered the mode of Levelising of each reflective statement containing a decision.

As shown in Table 9, I identified 112 decisions in my reflective statements. Twenty-five decisions were identified as Level II statements, 55 decisions identified as Level III statements, and 32 decisions identified as Level IV statements. No decisions were identified as Level I. Nearly half (49.9%) of the 112 decisions I made were in Level III mode. The percentage of total Level III decisions is higher than that of Level III reflective statements (38.8%). However, the large percentage of Level III decisions indicates that I focused on questioning my conceptual frames and was willing to alter my conceptual frames based on my reflections. While many decisions were informed by reflecting on the perspectives of others at Level IV, the decisions to change were made after reconsidering my conceptual frame. Although no distinct pattern or sequence was indicated, many decisions originated from, were contained within, or had been at least reflected on at a Level III mode. In other words, most decisions were viewed through my frame before being seriously considered. This appears to indicate that I compared a decision against my assumptions, values, beliefs, and biases before committing to act.

Table 9

Number of Decisions by Modes of Levelising

Modes of Levelising	Level I	Level II	Level III	Level IV
Total Decisions	0	25	55	32
Percentage of Total	0	22.5	49.6	28.8

Levelising and Decisions. Reflective statements have certain characteristics that associate them with one of the modes of Levelising. If the reflective statement is a decision, I've found that the decision focus reflects a mode of Levelising. For example, previously I had personally experienced difficulty in trying to complete one of the exercises termed the "dream inventory," and, therefore, I was not confident in asking others to complete it. When I decided to ask the participants their perception of the dream inventory, that represented a Level IV decision because I wanted to understand how they viewed the exercise. I arrived at this decision after reflecting at both Level III and IV modes. In my Level III reflections, I recognized my lack of confidence in completing the dream inventory which resulted in a bias against the exercise. When I decided to ask the participants about their perception of the exercise (Level IV), I had an expectation of what I would hear, but I was also willing to be influenced.

After being surprised by the participants' positive response to the dream inventory, I decided that "I had to try" to find a way to facilitate the exercise. Even though I was responding to the perceptions of the group, the decision to facilitate the exercise was a result of recognizing my biases and changing my perception of the inventory (Level III). I could just as easily have decided not to ask the participants their perception of the inventory. Engaging in Level III, I reflected on how my assumptions, values, beliefs, and biases were influencing me to ignore the dream inventory, and the need to understand the group's perspective of the exercise (Level IV).

Reflecting at Level IV helped me understand the needs of the group, and my need to change my perspective.

In the following paragraphs, I describe the foci of decisions that I identified within each of the four modes of Levelising. The examples provided in each section are taken from my reflexive journal.

Level I decisions. Level I reflective statements provide facts, describe actions, or set the context of a situation. Being “pre-reflective,” there is no analysis of the situation, so there is no basis for making a decision. As Peters and Ragland (2005) explain, “A practitioner engaged in her practice acts into situations based on considerations that she would be hard pressed to articulate if required to do so. The actions of our everyday lives do have bases, but those bases are not, for the most part, the result of conscious deliberation” (p. 3). Nearly a third of my reflective statements were categorized as Level I.

Level II decisions. Level II decisions focused on such aspects as the logistics of the course, course materials, and agendas. For example, “In the past, we began the workshops with incomplete workbooks and added as we went along. This time we were committed to having a complete package going in and only adding materials if new materials become available.” Decisions related to simple actions taken in facilitation were also evident in Level II. For example, “My intent was to follow the agenda prepared by Duncan but not try to attempt to replicate what I had observed him doing in the past.”

Level III decisions. Level III decisions addressed aspects of facilitation that were influenced by my conceptual frame, even to extent that I changed the aspects of my frame. For example, “I realized the time [the exercise] was taking, but I felt like it was well spent, because people were entering into dialogue. This is important to [me in regards] to getting the workshop

moving.” Level III decisions frequently were in the form of questions I asked myself. For instance, “Is it my responsibility . . . to help sell the notion that [performance planning] is a valuable activity? Can I, or should I, make an effort to change managers and employees perspectives on this without getting senior managers’ perspectives?” Although these are not declarative statements, the questions indicated decisions that became apparent through the reflective process.

Level IV decisions. Level IV decisions were focused outside of my conceptual frame and toward the frames of others. For example, “I need to be more sensitive to others’ needs for more structure and specifics. I am certain that the participants are more attuned to the need for explanations and clarification of exercises.” In addition to more direct attention to how others see their experience, Level IV reflective statements afforded me the opportunity to consider more fundamental aspects of how to provide the participants a valuable experience. For example, when faced with Duncan’s observation that I was focusing too much on professional goal setting and too little on personal goal setting, I had to make a decision. “I will pay more attention to them [personal goals] as we go along. My question is what’s the right balance of personal and professional? How will I know when I reach a good balance? The answers remain to be seen.”

Level IV reflections also focused on “new possibilities.” Emerging from Level IV reflections, new possibilities were directed at satisfying the needs of others and considered how others might view or accept the new ideas. After the teleconference session, I considered the possibility of including people who were not able to physically attend a class. “The experience [teleconferenced session] has caused me to consider the possibilities to make opportunities for someone who is not able to attend a course session in person to do so remotely.” I even broadened the notion when considering a group of employees who have historically been left out

of many training opportunities. “Is there a possibility we could have a form of distance learning for shift workers who have been excluded from many training courses because of schedules?”

Autoethnographic Narrative

Illustrating how Levelising informed decisions. In the following narrative, I illustrate how Levelising informed my reflective process and ultimately informed the decisions I made to improve my facilitation practice. I intend to provide a clear view of what took place; present my observations and interpretations; and describe changes I made in my practice and my practical theory regarding facilitation.

As customary, the autoethnographic narrative includes data collection, analysis, and interpretation with, hopefully, enough creativity to make it interesting (Chang, 2008). The narrative describes the moments that stood out for me during the fourth workshop session and is based on my reflexive journal entries. I chose session four as an example because, compared to the other eight sessions, session four resulted in the largest number of reflective statements; had the most reflective statements in Levels III and IV modes of Levelising; and included decisions in Levels II, III, and IV modes of Levelising

Because recordings were not made of the workshop sessions, the narrative is not a verbatim account. I provide the essence of actual conversations in the dialogue and describe the actions as I observed them, limited by my perceptions due to my conceptual frames.

Preparing for session four: reading session three reflections. My formative analysis required that I review the journal entry of session three prior to facilitating session four. Two reflections from session three informed my facilitation of session four. First, I realized that while I was comfortable with an unstructured approach to facilitation, the group needed a plan that was visible and that could be followed. Second, I realized that I had to be more aware of the

participants' experiences and expectations. This realization is consistent with my belief that facilitation is about serving the group, not pleasing myself. With this new understanding, I am prepared to facilitate session four.

Taking time to prepare. *I arrive early and have time to prepare the meeting room. I always feel better if I am in the room waiting when people arrive. I decide where I will sit and arrange my materials on the table. We are meeting in a different room from the first three sessions. We are meeting in a conference room with the typical single, long conference table surrounded by comfortable chairs. I choose the middle seat on one side of the table so that I am facing the door. I arrange my materials on the table in front of my chosen seat, reserving that spot and making my "nest." I have my workbooks, a pad for taking notes, and the agenda Duncan has prepared for the session.*

I plan on following the agenda, but I know that I have to be careful and try not to replicate how I remember Duncan facilitating in the earlier workshop. From past experience, I know that trying to copy Duncan's style just leads to confusion for me, and frustration for him. Duncan has noted the amount of time each activity should take during the session on the agenda. I realize that I don't know how to pace myself in order to cover all of the topics and activities. I will probably have to ask someone, either Duncan or Angela, to keep me on schedule.

I take my workbook and find a quiet place outside the meeting room to review the chapter. True to form, I have waited until just 30 minutes before the start of the session to begin preparing. As I read the chapter, I make notes in the margins of my workbook. Being early and actually sitting down and preparing seems a bit strange, maybe because it has been so long since I have intentionally tried to be prepared to facilitate. While I

am reading and making notes, I think to myself, “Hey, this isn’t too bad. Maybe Duncan and Angela do know what they are talking about.”

Perceptions of wasting time. *While reading through the materials, I get a gut feeling that we have already covered the subject. “Surely, we aren’t repeating ourselves. There must be something here I am not seeing.” I say to myself, as I try to make sense of what is going on. I immediately start imagining the reaction of the group if they perceive that we are repeating a topic. I am sure what I imagine might happen is much worse than what could actually occur, but I don’t want to take that chance. I am very sensitive to any group perceiving that their time is not being well spent in a course I facilitate. I have heard so many times the complaints that some courses are “a waste of time.” Most of the complaints are directed at “required” training, not the type of professional training we provide. However, in my earlier training positions, I taught some courses that have been pointed to as wasting their time. It was not a good feeling to hear the complaints, even if I had nothing to do with setting the requirements or designing the course.*

My goal is that the participants see tangible value to the workshop. I have only heard positive feedback about the initial workshop and, up until now, compliments on the current one. However, I still can’t let my guard down.

For the folks in this workshop, time is very precious. They all work more than 40 hours a week. They have more to do than time to do it. If an outside training provider does not live up to the participants’ expectations, that is one thing, but we developed this training internally. We should be providing training that meets their needs. Our (Angela’s, Duncan’s, and my) reputations are on the line, as well as the future of the workshops. If the group members go back to their peers and discourage them from

attending future workshops, we have failed. Since the group represents a larger number of directorates than normal, it is even more important that we provide value.

I am nearing the point of panic when I finally realize that I have mistaken a conversation we had in an earlier session with the content in this week's reading. The content chapters and the goal setting portions of the workshop are designed to be an integrated whole; therefore, conversations and information sometimes overlap slightly. I calm down. At least I was aware of what could have been happening. Crisis averted, for now.

Conflicting conceptual frames. *I find one of the most difficult aspects of facilitating this workshop is asking folks to complete the "dream inventory." In the inventory exercise, each person lists things they want to experience, acquire, or accomplish. Developing the inventory is a personal brainstorming exercise where nothing should be left off the list just because the dream doesn't seem achievable. Initially, 50 dreams are listed, and 25 dreams are added to the inventory each week.*

I attempted to complete the dream inventory a couple of years ago while Duncan was coaching me, one-on-one. I found it not just difficult but impossible. I could list several things that I have always thought about, such as building a sailboat or getting my private pilot license. After listing only a dozen or so items, I simply ran out of dreams. Duncan coached me and led me through the exercise, but I just couldn't do it. I was able to do all of the other goal setting and planning activities, but not the dream inventory. At the time, I was struggling with severe depression and in the midst of a divorce. Dreams didn't come easily for me. Even now, I am very hesitant to ask this group to identify their dreams.

We are nearly halfway through the workshop, and I have said very little to the group about the dream inventory. Duncan and I had observed in the initial workshop, that it took a few weeks before the group members began to really understand the goal setting process, which includes the dream inventory. The same pattern seems to be holding true for the current group. I decide that it is time that I find out what the group thinks about the inventory. The best way I know to find out what someone thinks is to just ask. Of course, I expect to hear that others find capturing their dreams hard as well.

“How are you doing with the dream inventory?” I ask the question to the entire group, listening for an expected response.

“I like it.” Andy surprises me. Out of all the participants, Andy is the one person I did not expect would find the inventory valuable. Not that he is hard to please, but he seems to be more oriented to the “practical.”

“Really?” I respond, trying not to seem too surprised. “Say more.” I have to find out why he likes the exercise.

“It makes me think about things that I haven’t thought about in a while. It also gives me an idea of what I think is important,” he explains. “I really enjoy it. It is very valuable.”

“Anyone else?” I continue asking the other participants. Their responses strike me. No one finds the dream inventory as difficult as I did. In fact, they all seem to enjoy the exercise. I am pleased, but perplexed. I am not sure how to go on with what I just learned. What really troubles me is that I have underplayed the inventory based on my inability to dream. I now need to engage them in the dream inventory process. Maybe, if

I can approach the exercise from how the dreams connect to long-term goals, I might be able to make sense of it. I will have to try.

Planning versus “winging it”. *Unlike last week, I intend to use the thought questions. First, I have the group read the chapter so that we can all participate in the conversation. I lead off with the first thought question. The question works so well at generating conversation around the material that I continue with the rest of the questions through the session. I realize I am staying on task and focusing on the chapter content. I can't really point to what may be influencing me, but I feel that the questions, along with the little time I took preparing before the session, have contributed.*

I still like the feeling of “winging it,” and the spontaneity it brings to facilitation. However, I think I might be enjoying the spontaneity more than the participants, and certainly more than my co-facilitator. This session demonstrates to me that Duncan and Angela might be right. Preparation and following a plan benefits not only the group's experience but also mine. I have been facilitating classes for many years. I don't know why I have just now become aware of the importance of being prepared.

The session is going quite well, even with my minimal preparation and struggle with the dream inventory. Suddenly, an idea strikes me. I am not sure why. Maybe reflecting on my experience with the dream inventory sparks the idea. I start thinking about my one-on-one coaching experience with Duncan. These materials are really designed for a one-on-one approach, especially the goal setting and planning portions. I think to myself, “I wonder how different it would be to facilitate this course from an individual, instead of a group, perspective? What would the experience be like for me, and the group?”

Here I am trying to improve my ability to facilitate within a setting in which I am familiar (a classroom), and thinking about entering into a situation in which I have very little experience (one-on-one coaching). I still think it's a good idea, but I wonder. "How can I prepare myself?"

"Angela, would you do me a favor?" I ask at the beginning of our debriefing.

"Maybe, what is it?" She responds, but leaves herself an option. Actually it is not a bad move, with my history of "unique" ideas.

"Would you let me practice one-on-one coaching with you before the next session?" I ask. "During the conversation about goal setting, I had an epiphany. I suddenly wondered if approaching the facilitation as one-on-one coaching would help me ask questions and engage folks in dialogue." I explain.

"Sure. What do I need to do?" She asks.

"Just read the next chapter, and consider the thought questions. How about tomorrow afternoon? I will schedule a meeting room."

"Okay. Just let me know when and where." The meeting is set.

I turn to Duncan. "Duncan, if you are available, would you come and observe?"

"Sure, just let me know when you get it scheduled." He responds. This should be interesting.

Crisis in types of teaching and learning. *I have a sense of being in more "control" of what is going on in the session. Not a Type I approach, but definitely not Type III. I wonder how Duncan observes what I am doing.*

"I still don't feel that we are collaborating. How do you see it?" I ask Duncan.

“I see what we are doing as Type II, and Type II is probably appropriate for this group and the topic.” He responds. “The group is engaged and their energy level is good. That indicates to me that things are going well.”

His remarks are positive. However, what I hear is, “You aren’t providing a collaborative learning environment.” One of my goals is to provide the group with a collaborative experience. I feel committed to provide a Type III environment.

After our debriefing, I sit down with my journal to consider the frame through which I see facilitation. As I write, I realize that I am obsessed with being looked at as a facilitator of Type III. I suddenly face the fact that I may be forcing the Type III style into situations where another style might be more appropriate.

“What makes my perspective better? Why am I trying to force Type III on people without considering if it is appropriate for the topic, or the group?” I ask myself. My “one-size-fits-all” notion of applying Type III looks more like Type I. This seems like a paradox, but seems to be what I am doing in practice. I don’t know exactly what to do with this epiphany, but I can’t just ignore it.

Considering the Narrative.

All three types of decisions are found in the narrative. For example, there are direct statements describing decisions to act, such as asking Angela to participate in a one-on-one practice coaching exercise prior to the next session. There also are decisions to consider changing my perception of aspects of my practice, such as changing how I viewed my determination to facilitate in the Type III teaching and learning model. I also demonstrate my decision to open up to new possibilities. “My facilitation benefitted from the preparation that I

took prior to class. I need to make this a part of each future session.” Table 10 shows the decisions in session four categorized by mode of Levelising.

Table 10

Session Four Reflective Statements Containing Decisions by Modes of Levelising

Level II Mode of Levelising	
7.21.06-2	My intent was to follow the agenda prepared by Duncan but not try to attempt to replicate what I had observed him doing in past workshops.
7.21.29-2	From my experience last week, I planned on covering the thought questions to guide our conversation.
Level III Mode of Levelising	
7.21.07-3	I know that we have very different styles, and I have to trust my own abilities and instincts.
7.21.27-3	I have been able to encourage the group to complete the dream exercises by making the connection to goals.
7.21.33-3	I am getting more and more a sense of how important it is to prepare before each session.
7.21.36-3	I believe that it is more exciting for me than it is for the group.
7.21.41-3	However, I agree that T-II is not a bad thing, especially in this situation.
7.21.46-3	By trying to do this, am I actually exhibiting T-I?
7.21.53-3	In fact, as I was in the midst of the session, an idea struck me. How is facilitating these sessions different from how Duncan performs his coaching with individuals?
Level IV Mode of Levelising	
7.21.14-4	So they must see tangible value, consider their time well spent, and feel challenged by new ideas.
7.21.37-4	I need to listen more to what Angela and Duncan have to say. They are trying to give the perspective of the group, not just what they see from co-facilitator/professional.
7.21.42-4	I have to be more sensitive to what perspective the group takes when approaching the course than how I look at it.
7.21.52-4	My facilitation benefitted from the preparation that I took prior to class. I need to make this a part of each future session.
1.21.57-4	I could draw on my experience with Duncan's coaching and also bring my own experience in helping others reflect and generate new perspectives.

As I reflected at Level III, I began to consider my conceptual frames by challenging my beliefs, assumptions, values, and biases. For example, I discovered how my inability to complete the dream inventory led to a lack of confidence in engaging the group in the exercise (Level III). At the same time, I realized that I needed to understand the group's perception of the exercise (Level IV). Their responses left me "perplexed" but willing to look for a way to go on. I decided that making the connection between dreams and goals might be a way for me to facilitate the dream inventory that would accommodate the group's needs for completing the inventory and my need for a sensible context (Level III). By intentionally reflecting within the framework of the Levelising model, I was guided to this decision.

Another less immediately observable decision was when I came to terms with my obsession with Type III teaching and learning. Duncan's observation that Type II might be most appropriate for the workshop did not immediately strike me as acceptable (Level III). Again, I found that I was disregarding the perceptions of others and trying to force my own biases onto the participants (Level IV). In my reflections I questioned whether forcing Type III into a situation inappropriately was the same as facilitating in a Type I manner (Level III). My willingness to explore Duncan's frame and consider the frames of the group resulted from reflecting at the more expansive modes of Levelising. From this reflective act, I decided to open myself to change my perspective on the three types of teaching and learning. Even though I was aware that I might continue to struggle with choosing a Type other than Type III, this new understanding would continue to inform my practice in the future.

Chapter 4: Discussion of Results

This chapter addresses the Theorize phase of the second half of the DATA-DATA model. I discuss the results presented in Chapter Three in light of my practical theory. I first discuss the results of my summative analysis that address my first research question. Next, I discuss the synthesis of my formative and summative analyses as they relate to answering my second research question. In both cases, I present how the results compare to previous studies of Levelising and related literature.

My practical theory (see Chapter One) is that engaging in Levelising while reflecting on my practice would help me to improve my facilitation. Reflecting in this manner would help me to become aware of my actions, how my conceptual frames informed my actions, and decisions I made as a result. Reflecting on my practice in this manner generates opportunities for me to make meaningful improvements to my practice.

Question One:

At what reflective levels of the Levelising model did I engage during the study?

The results of my summative analysis identified the modes of Levelising in which I engaged, and how they were distributed across the nine sessions. The number and distribution of reflective statements indicate that I reflected in all four modes of Levelising. Approaching this study with the specific intent to reflect using the Levelising model in combination with deliberately questioning my conceptual frame contributed to my reflecting in all four modes. The self-questioning process, in particular, contributed to my reflecting in both Levels III and IV. To reflect within the framework of Levelising, I had to question my actions, my perspective, and the perspectives of others. Such reflection does not come naturally to me. In some cases, I wrote reflexive journal entries in response to questions that I posed to myself. Some questions

were recorded in my journal entries. Some of my questions were left unanswered, but asking myself these questions illustrated the decision to challenge my conceptual frame or inquire into the frames of others.

Below, I discuss results for research question one in terms of how my results compare to previous studies, my conceptual frame, patterns and trends, sequence and hierarchy, and the situational aspects of reflecting using the Levelising model.

Comparison to previous studies. The distribution of my reflections in the four modes of Levelising was very different when compared to the studies of Gaskin (2007) and Duncan (2009). Rather, my distribution more closely resembled that of Torres (2008). Table 11 compares the modes of Levelising engaged in the three studies mentioned above, and my own.

Table 11
Comparison of Modes of Levelising Engaged in Previous Studies by Percentage of Total Reflections

Level	Gaskin (2007)	Duncan (2009)	Torres (2008)*	Creekmore (2011)
I	49.66	82	21.5	16.8
II	40.82	11	26.5	20.4
III	7.03	4	31.5	38.8
IV	2.49	3	21.0	24.0

* Torres did not report the extent of mode of Levelising engaged as a percentage of total but as the percentage of reflections occurring during each group meeting. The data shown are the median percentages calculated from her results over the total number of meetings.

As participant-researchers, both Torres and I were personally engaged in the dialogue and reflective processes. As Table 11 shows, over 50% of our reflections were Levels III and IV. I attribute this to the intention of Torres and me to explore our practices at Levels III and IV modes of Levelising. One particular similarity is that over 30% of the reflections in both of our studies were in Level III mode of Levelising.

In their studies, both Duncan (2009) and Gaskin (2007) introduced others to reflective practice and Levelising. For the mental health practitioners to whom Gaskin (2008) was introducing Levelising, over 89% of their reflections were identified as Levels I and II (49.6% and 40.8%, respectively). Duncan identified 93% of the reflections of his clients during his coaching sessions as Levels I and II, with 82% being Level I. As Duncan observed, “[M]uch of the practical work of business is performed at level 1 and 2 which may have been one reason that my clients primarily engaged at those levels.” However, he points out that his clients were capable of engaging more reflectively, but his way of interacting with them prior to beginning his study may have been a barrier (p. 85). “I found that all of my study participants were both willing and able to reflect at levels 3 and 4 . . . My prior relationship with each client and our history of engaging predominantly in level 1 and 2 discourse may have also contributed to this finding (p. 85).”

My conceptual frame was important. In Level III reflections, I evaluated my values, assumptions, biases, and beliefs which make up my conceptual frame of reference. The relatively high percentage (38.8%) of Level III reflections illustrates the importance I placed on reflecting on my conceptual frame. In seven of the nine sessions, the majority of reflections were in the Level III mode, further indicating that Level III mode became a dominant characteristic of my reflective process. In many cases, I considered an issue in a Level III

reflection prior to making a decision, even if the impetus for addressing the issue originated at another level.

I also observed that less than 17% of my total reflections were Level I. While this seems to represent a small percentage of my reflective statements, especially when compared to previous studies about Levelising, it is not surprising considering that my data consisted of my personal reflexive journal entries. I had personally experienced the session, so I did not need to develop the context of the episode to the detail I would if writing for someone who was unfamiliar with what had occurred. Since I was both participant and researcher, I understood the context so I was able to minimize Level I statements. Rather, in the context of my reflexive journal, Level I reflective statements served the purpose of keeping my reflections organized, providing the context of the episode, and describing my perceptions of what occurred.

No patterns or trends appear in reflections. The distribution of reflections within episodes with respect to the four modes of Levelising indicates no apparent pattern or trend. Rather, when I reviewed the levels of the reflections within the journal entries and episode maps, I noticed that I seamlessly and naturally moved back and forth between the different modes of Levelising. I did not find a general trend of reflecting in Levels III and IV in later sessions than in earlier sessions or any other changes in distribution of the modes over the course of the study.

No sequence or hierarchy in modes of Levelising. There is no evidence in my data that I reflected using the Levelising model in a sequential manner. The numerical identification (Levels I, II, III, and IV) of the modes of Levelising might suggest that one must progress sequentially from one level to the next while reflecting. One might also infer from the Levelising model that reflections characterized by the “higher order” modes (Levels III and IV) are, in some way, more valuable than reflections in the “lower order” modes (Levels I and II).

My data do not support that notion. Rather, as discussed in my answer to question two, each mode of Levelising serves its own unique purpose in the reflection process.

Reflection in modes of Levelising was situational. The data indicate that the reflective process and reflective mode of Levelising in which I engaged varied from one session to the next. When comparing the distribution of the modes of Levelising across the sessions, the data reflects a relationship between situations that question or challenge my assumptions, values, beliefs, and biases and reflective statements at Levels III and IV modes of Levelising.

Admittedly, some differences could be attributed to my ability to consistently observe the sessions' activities and reflect on what occurred. However, I also attribute the differences to how the situations that occurred during the sessions challenged conceptual frames. Table 12 provides summaries of the situations that occurred in each session.

Table 12

Relationship Between Situations in Sessions and Reflective Modes of Leveling

Summary of Situations by Session		Levels			
		I	II	III	IV
1	I was not prepared for initial session. Duncan was frustrated from having to help with materials at the last minute. A scheduled presentation rehearsal was cancelled. I did not greet participants as they arrived. Introductory video was not successful. Duncan had to intervene and help me with the presentation. Duncan pointed out that the instructor notes contained the information.	10	9	17	11
2	I was unprepared for the second time and Duncan had to help at the last minute prepare materials. I did not follow the agenda and went over the planned time for "Good Leader" exercise. I made the decision to introduce dialogue and inquiry. Duncan and Angela pointed to my failure to keep on schedule. Duncan noted that I focused more on work goals versus personal goals.	7	5	15	9
3	I became more sensitive to needing to prepare. I acknowledged my tendency for "winging it" and group's need for preparation. I had one-on-one run-through with Angela to prepare for facilitation. Took time to make notes in workbook prior to session.	5	5	7	6
4	While preparing for the session, I perceived that we were repeating topics and fearful that participants would think we were wasting their time. I asked group for impression of "dream inventory." I was perplexed by their positive opinions. Duncan observed that I was in Type II teaching and learning, instead of Type III. I came to a stronger realization that preparation was important.	6	11	29	13
5	Two participants had to leave the group. Meredith, due to an accident. Andy, due to excessive workload. I realized that I needed a "go-to" person in the group to help maintain dialogue. Erin joined the group. I expected the character of the group to change due to people leaving and entering. I felt that I would have to change my facilitation in response. I asked a question and let "dead air" exist as a technique to get people to engage.	1	3	19	7
6	Meredith asked to participate in the session through a telecom. I was initially uneasy in using the telecom. Participants adapted well to the telecom and took the lead in handling the logistics. I had to visualize Meredith as being in the room and keep her engaged in the conversation.	12	21	21	16
7	David visited the session and provided his perspectives on the direction of the organization. He also answered questions posed by the group. I had to present the groups' questions without revealing the person that had posed it. Stanley (most senior participant) provided his observation of David's comments. Pam (most junior participant) also added her reaction to David's comments.	7	10	12	9
8	I made a statement in response to a comment by Pam that I realized could have been perceived as sexist humor. Angela observed that I regularly use self-deprecating humor that could cause the group to question my qualification for facilitating the course.	9	3	17	7
9	I did not keep the group for the entire session. I felt a relief that the workshop was ending. The group provided positive feedback regarding the workshop. I noted some possible changes that could be made. For example, this final session may be used as a "tying the bow" session.	3	6	2	8

During sessions in which my conceptual frames were challenged, I engaged in the more expansive reflections afforded by Levels III and IV modes of Levelising. In such cases, Levelising required that I “step back” to see how my frames influenced my perceptions and actions (Level III) or step back further to understand the frames of others (Level IV). Once again, one level is not more valuable than another, just more appropriate for the situation in the same way that some tools are more appropriate for certain jobs. Understanding how my assumptions, values, beliefs, and biases might be influencing my actions could not be accomplished without Level III reflection, which in this analogy was the right tool.

Duncan’s observation in session four that I was engaging in Type II teaching and learning forced me question my assumptions, values, beliefs, and biases and how they contributed to my insistence on maintaining a Type III teaching style. My inquiry into my conceptual frame on this topic and my exploration of how others perceived how I was facilitating resulted in a large of number of Level III (16) and IV (8) reflections (episode L). Another example that comes from session eight was my struggle with an observation made by Angela that my use of self-deprecating humor could result in the group doubting my qualification for facilitating the workshop. I had used such humor to avoid positioning myself as an expert. For example, I referred to a statement I made during the session as a “bonehead” idea. Her observation struck me because I have poked fun at myself for as long as I have been facilitating. The high number of Level III reflections (13) out of the total (20) from the session in which that occurred indicates my exploration into my assumptions, values, beliefs, and biases related to that behavior (episode W).

As I mentioned earlier, I intentionally tried to challenge myself to inquire at Levels III and IV. However, I also became aware that to understand some situations I did not need to

reflect at Levels III or IV. For instance, there was no need to question my conceptual frame to decide to move an exercise to another session because the exercise did not fit the topic of the session. On the other hand, in session four, I immediately entered into Level IV mode of Levelising when I became concerned about repeating course content and how the group might perceive their time being wasted. This serves as one more example that the mode of Levelising chosen at any time was influenced by the situation and my need or desire to understand.

Research Question Two:

How did Levelising inform the decisions I made in attempting to improve my facilitation of professional development workshops?

In Chapter Three, I reported results regarding how my engagement of Levelising in reflective practice informed decisions I made to improve my practice. In this section, I discuss how Levelising informed decisions in terms of how I came to the workshops with respect to position, intentionality, and awareness; how Levelising influenced how I inquired into my practice; and how Levelising is reflected in previous studies.

Levelising Influenced My Positioning, Intentionality, and Awareness

Levelising influenced the manner in which I approached each workshop session and development of my reflexive journal following each workshop. Specifically, it affected the manner in which I positioned myself, how intentional I was in the process, and my awareness of others and myself. Each of these played a key role in shaping the decisions that I made during the workshop.

Positioning. During the workshop, I positioned myself and was positioned by others as a facilitator. The Levelising model called me to pay attention to how I was engaging with the group and the reasons for my approach. It also allowed me to be more sensitive to the frames of

others, including the group's view of my qualifications and Duncan's view of facilitating. As I wrote in my reflexive journal, I positioned myself as both an action researcher and the subject of the research as a practitioner. From my practitioner position, my primary focus was on facilitating the workshop activities and reflecting-in-action, requiring that I observe my actions during the workshop sessions. As a researcher, I had to attend to the process of the research. For example, I had to be mindful of the nature of my reflections to meet my goal of reflecting in all four modes of Levelising. At the same time, I had to provide my personal reflections on my actions, as would a participant being interviewed by a researcher. I was able to accommodate both of these positions by being intentional in my reflective process. The Levelising model established the framework that informed the position I took in the process, from reflecting in the moment on a statement I made as a participant to acting as researcher when inquiring into my frames and the frames of others. Being positioned in both practitioner and researcher roles, decisions I made to modify my facilitation approach were informed by both perspectives.

Intentionality. Intentionally engaging in Levelising while reflecting on my facilitation experiences meant that I had to inquire beyond “what happened” and “why” I chose to act or react in a certain way. During my reflexive journaling, I deliberately asked myself challenging questions to become aware of my assumptions, beliefs, biases, and values that supported or influenced my actions. I also challenged myself to consider the conceptual frames through which others might experience a situation or contemplate an action. Reflecting on my frame and the frames of others offered the opportunity to make decisions from these perspectives. This provided a broader basis for making informed decisions.

Awareness. The Levelising approach helped me to maintain my awareness of the need to “step back” and view a situation. Stepping back allowed me to view situations from a

perspective that enabled me to see my actions. This change in perspective further allowed me to see my relatedness to my actions. In other words, I discovered how my conceptual frames influenced what I did, and how well my assumptions, biases, values, and beliefs were serving me. I became more aware of my relationships with others, and how I saw myself in the interactions and the expectations of others. My decisions were influenced not only by my own interests, but I became more interested in meeting the needs of the participants and my colleagues.

Levelising Influenced How I Inquired into My Practice

Intentionally reflecting through Levelising required me to question my actions, my perspective, and the perspectives of others. Just as Duncan used questions while coaching his clients to more expansive reflection, I found myself doing the same while writing my reflections. Some questions I wrote in my reflexive journal. Others I responded to without actually writing them down. Some questions I was able to answer, while others were left unanswered. Some questions were evidence of decisions, or changes in perspective taking place.

My decisions originated from my reflections and were generated during my formative analysis. I made decisions as I wrote my reflections in my reflexive journal. My reflections were made at different modes of Leveling, and the decision reflected the modes in their focus. Decisions made while reflecting at Level II focused on the logistics of facilitating the workshop. Decisions made at Level III focused on my conceptual frames. Level IV decisions were made to address how others perceived, or framed, my facilitation. Decisions were made at all modes of Levelising except Level I. Since Level I is “pre-reflective,” it follows that decisions were not observed in Level I statements.

Levelising in Previous Studies

I feel that an important difference in my study as compared to Gaskin (2007), Duncan (2009), and Torres (2008) was the source of data, which reflects the researcher's role in the study. I studied my personal engagement in Levelising, not how others engaged. As the researcher positions himself or herself in a participant role, reflection beyond Level II becomes more likely. Additionally, as a participant-researcher, I understood reflective practice and the Levelising process, so I could engage in the processes with clear intention and understanding.

I found both differences and similarities when I compared the extent of reflection in the modes of Levelising within my study to the other three dissertations mentioned above. When I reviewed the discussions of their results, I found interesting reflections that Gaskin (2007), Torres (2008), and Duncan (2009) made on their personal experience and observations of research participants. I noted how their reflections and observations were very similar to my own. My dual role as researcher and sole participant positioned me uniquely when compared to the other studies. However, their reflections as researchers and their observations made regarding the participants closely described how I viewed my experience and what I wrote in my reflexive journal.

I was struck by Gaskin's reflection on her role as the facilitator of the Assertive Community Treatment Team (ACTT). In her reflexive journal, she questioned if her "performance anxiety" (p. 63) influenced how she facilitated the group. She noted how questioning her actions and thoughts allowed her to see the frames that influenced her practice. This led her to ask serious questions regarding her relationship to the group.

So I wonder what it is about my practice that led me to feel uncomfortable with the team's process. What is my focus on during the ACTT meeting? Am I inwardly focused or focused on the team members? Am I attending to the conversation and being in support of team members? Am I focused

on my own performance and wanting to be helpful? Is my own performance anxiety interfering with the team's work? (p. 63)

Looking back at my narrative of session four, I see a strong similarity to my reflections on the issues I had with the dream inventory. My own performance anxiety related to my difficulty in completing the dream inventory influenced me to shy away from spending any time on the exercise. Engaging in Levelising led me to ask the participants how they perceived the dream inventory and brought me to the realization that I needed to attend to the inventory exercise.

An observation and realization identified by Torres (2008) closely resembled my own realization of the importance of being more aware of the frames of others. Also, she pointed out how important it is for me to suspend my conceptual frame for consideration.

I now understand that it is *my* frame that is important in how I interact with organizations. From my new worldview, I see that the most important thing I can do in working with clients is to suspend my frame and truly listen, asking questions in order to understand their needs from within their frame. It is then up to me to select a frame that will allow their hopes to be realized in one way or another. (p. 86)

Torres' reflection on how she found herself trying to overlay her frame on others, and how she came to understand that each organization was different, mirrored my epiphany related to Type III teaching and learning. Although Torres' role was different from mine, the essence of her observation was, "I am now acutely aware that as a consultant, it is not my role to overlay my frame on them, nor to insist they develop my frame" (p. 81). This statement could just as easily be applied to my feelings after reflecting on my obsession with applying Type III teaching in every situation.

Duncan's (2009) observation of his clients' reaction to reflecting on issues about which they had strong feelings or challenged their values and beliefs was similar to my own experience. Two examples from my study stirred strong reactions: my struggle with resolving an observation

that questioned my use of self-deprecating humor and my feelings regarding Type III teaching and learning. I spent a great deal of time reflecting on these issues. Duncan's observation could have easily been referring to what I experienced:

The extent to which my clients identified with their stories, beliefs, and values became apparent during coaching transcript analysis. Asking them to reflect on those stories, beliefs and values at multiple levels created discomfort. In such cases, clients struggled to express their thoughts, questioned themselves, and presented both sides of an argument. (p. 90).

Duncan's use of questions to lead his clients into reflections in all four modes of Levelising was similar to how I approached my reflexive journal writing. Either by writing the questions in my journal or by keeping the questions in mind, I wrote with the intention of addressing the types of questions Duncan posed to his clients. He described his use of questions: "I engaged in Levelising with my clients by intentionally asking questions targeted to particular levels so that I addressed all four levels of Levelising" (p. 91).

Duncan summarized, and asked his clients to summarize, what was being said and the interactions at the end of each coaching session. He pointed out that these summaries helped him and his clients gain "fresh insight into their thoughts, leading them into further reflection about what they learned" (p. 93). Although these summaries were not written (they were transcribed as a part of Duncan's data collection methodology), they appear to serve as an oral reflection process that served much the same purpose as my reflexive journal. It forced Duncan and his clients to put into words their thoughts, so they could see what they were thinking.

My position as sole participant-researcher was different from the positions of those conducting the other three studies. Also, my methodology of data gathering, analysis, and presentation of results was very different. My selection of the autoethnographic approach

allowed me to describe the personal experience of engaging in Levelising and show how doing so informed my decisions and actions to improve my practice.

Final Discussions Regarding How Levelising Informed Decisions

Reflective practice cannot be expected to yield formulaic solutions to “problems.” Reflection is a recursive, constructed process that is reconstructed in each consideration of an action or a situation. When reflecting through Levelising, each reconstruction is accompanied by a reconsideration of the frames influencing our perception and how others might be viewing the same problem or situation (Peters & Ragland, 2005).

The decisions that resulted from my project had both immediate and long-term aspects. I acted immediately on many of the decisions I made during the course of the workshop. As a result of some of my decisions, I will change how I approach facilitation in the future. I still have to resolve some decisions that remain unanswered questions. It is possible that some of the questions will never be resolved.

Chapter 5: Summary, Conclusions, and Implications

This chapter addresses the final phase of the DATA-DATA model, *Act*. I conducted this action research project to explore my experience of engaging in reflective practice through Levelising to improve my facilitation practice. I expected that my reflection on practice would reveal a new view of my ability to facilitate. I also expected that Levelising would help me become aware of the actions and decisions I made in the moment of interactions. From this awareness, I could reflect on why I responded, how my conceptual frames informed my actions, and how the frames of others might influence decisions. Expanding my reflections on my practice through Levelising, I thought, would present opportunities to make meaningful improvements to my practice. I believe that I made progress toward achieving my purpose.

Summary and Conclusions

1. Levelising changed the character of my practice. Although I believe that I have practiced “reflectively” for many years, engaging Levelising as a model brought a different character to reflection on my practice. I had to be mindful of the goal of improving my facilitation practice while studying my experience of engaging in Levelising. Maintaining the necessary discipline in my reflections on practice while performing my research added a different dimension to how I experienced reflective practice.

Reflective practice as described by Schön (1983) is the model to which I was introduced several years ago. Along with Argyris (1978; Argyris, 2004) they speak about “mental models” of how we see our world and influence our actions. These models can be liberating or constraining. Reflective practice invites us to question mental models, understand them, and change them if needed. The Schön and Argyris (1978; Argyris, 2002) approach to reflective practice involves cycles of action and reflection through single-loop and double-loop learning.

Single-loop learning is described as detecting errors and acting to correct them to maintain the current objectives through existing policies and processes. Double-loop learning is described as detecting errors and making corrections after questioning and modifying current norms, policies and objectives. Schön and Argyris also speak of developing “shared” mental models (Argyris & Schön, 1978). Prior to this study, I had understood reflective practice to be similar to Schön and Argyris’ concepts, at least in the context of professional practice.

Questioning mental models is useful from a systems-thinking perspective. However, Levelising made reflection on my professional practice a very personal experience. I found that I had to be mindful of how my personal frames and professional frames informed each other. In the process, I challenged both conceptual frames. I was also called to consider the frames of others. I examined the assumptions, values, beliefs, and biases of others in order to understand their view of a situation. I did not seek a “shared” frame but a way to begin to understand the conceptual frames of others as well as my own.

During this study, I found that reflection was primarily a questioning process. My ability to challenge my personal and professional frames and inquire into the frames of others was dependent on my ability and willingness to question. I found that I asked myself questions similar to those that Duncan (2009) used during his coaching sessions to encourage his clients to reflect deeper into their practices. The questions were often left unanswered as I wrote them. Decisions were sometimes stated in the form of questions.

Levelising required me to heighten my awareness of what was going on in the workshop sessions. I had to be aware of the actions, interactions, and reactions of myself, as well as the participants. I had to pay close attention to the discourse and engage the participants in dialogue.

This positioned me as a facilitator/observer with the responsibilities of both roles having to be fully served.

The reflections developed through Levelising provided me a new understanding of my practice. The use of Levelising revealed aspects of practice that I consider important by enabling me to explore into my actions. Without engaging in Levelising, I would not have expanded my reflections as wide or inquired in the manner necessary to understand how I framed my view of facilitation. From this understanding, I challenged my assumptions, values, beliefs, and biases to make decisions to improve.

2. Levelising required intentionality. Reflection through Levelising required that I make an intentional attempt to engage in all four modes of Levelising; that is, it would not have occurred by chance. Levelising required effort.

To be intentional, I had to be aware. I had to be aware of my actions as facilitator. I had to be aware of the actions of the workshop participants. I had to be aware of my engagement in Levelising. I went into the project with the understanding that I needed to actively question and challenge my assumptions, values, beliefs, and biases. I also knew I had to actively inquire into the conceptual frames of others.

I had to be mindful of my position as observer/facilitator. Engaging fully in Levelising required me to be positioned in this dual role. I was forced to question my frames, provide responses when I could, and be willing to admit I didn't have the answers when at a loss to explain my actions. I was also forced to try and understand the perspectives of others, inquire into their frames, compare them to my own, and to seek to be influenced by what I discovered.

Questioning proved to be the foundation for being successful at engaging in reflection through Levelising. Questioning my actions, questioning my motives, questioning my

conceptual frames, questioning the frames of others, and questioning myself to move me into more expansive reflections are just some examples of how questions were fundamental to the process.

3. Journaling aided in reflection. The physical and cognitive act of journaling contributed to the success of my project. Journaling was more than just a way to record my observations and reflections. It became the “other” to whom I had to clearly describe what stood out to me in each session, my actions, and my reflections. The physical act of writing became an important part of my reflective process. After each session I had to pause, sit, and write. There was a discipline about this act that not only forced me to complete my journal entries but also gave me the permission to set aside the time for this purpose. The product of my journaling was a written record that I could immediately read and re-read throughout the workshop, and read even today. The handwritten pages, with misspellings, sometimes hard to read penmanship, and poor grammar, are a very personal account of my experience. Reading the handwritten entries is very much like recalling a face-to-face meeting where my reflections were shared.

4. Levelising was not hierarchical or sequential. From my personal experience, I agree with Peters’ contention that no hierarchy exists between the modes of Levelising (Peters & Ragland, 2005). I learned things about my practice and myself in each reflective mode. Although my intent was to engage in all modes of Levelising, and I was careful to ask myself questions to help me reflect in all modes, the situations I faced were the impetus to more expansive reflection. Situations challenging my personal frames naturally led me to ask questions that resulted in Level III reflections and decisions. Wanting to know how others view a situation naturally prompted me to ask questions that led me to Level IV reflections and

decisions. At times, I found myself intentionally inquiring into my actions to determine if I was being influenced by my frames (Level III) or by the frames of others (Level IV).

Even though I sometimes had to intentionally inquire to reflect more deeply, there was no sequence that had to be followed to reflect at the different levels. In other words, I did not have to start at Level I, move to Level II, progress to Level III, to eventually arrive at Level IV. My reflective statements and decisions could begin at any level and be resolved at any mode of Levelising.

From my experience, I see the modes of Levelising as being similar to the three dimensions of a solid object, such as a cube. We have learned, and are conscious of, the concept of three-dimensional shapes. So, we can choose to view the cube from any dimension. To see it as three-dimensional object, we don't have to first look at it from one dimension (e.g., width), then two dimensions (e.g., width + height) before we can see it from the three dimensions (e.g., width + height + depth). We have learned from experience to intuitively view the cube from the dimension that serves us at the time. I see the four modes of Levelising being similar. We can reflect on a situation immediately at the level that serves us at the time. The key is to become experienced and familiar with the four modes of Levelising. We can then recognize the appropriate mode to engage while reflecting on a situation or realize when inquiry might be needed to determine the appropriate level that will help us understand the situation.

5. Decisions were informed by modes of Levelising. Decisions that emerged from the reflective process described above were informed by engagement in Levelising. Decisions were made in regard to how I framed the situation, how others framed the situation, and differences in the two. My reflections and decisions took on a different nature, informed by my new understanding of my practice provided through engaging in Levelising.

I do not claim that my decisions were the most effective, by whatever measure determines effectiveness. I do, however, claim that my decisions made sense to me at the time. Reflective practice can do little more than help make sense of what is occurring and provide understanding upon which decisions for further action can be made. Levelising provided the framework that encouraged me to open my view to encompass a broad picture of how I, and others, framed the world and provided access to the possibilities we might not have otherwise seen.

Autoethnographic approach. Approaching my study as an autoethnography had its benefits and challenges. I feel the most valuable benefit came from allowing me to look directly at my actions and reasons behind them. I did not gather interview data and make interpretations from what others experienced. I was intimately involved and invested in my actions. I was the source of my data and the interpreter.

Challenges came along with the benefits. I was the one observing my actions. I was the one identifying the reasons behind those actions. The position of participant-researcher required me to remain honest with myself so that I could provide an honest portrayal of what occurred. I do not confuse honesty with accuracy. I provided a transparent account as I observed the situations, but I realize that my observations were limited. I had to be aware of what went on in the sessions and be willing to question my actions and explore new possibilities. It was difficult, at times, to admit that I was not consistent with my espoused values. It was even more difficult to be surprised by my own actions. However, levelising provided a way of revealing disturbing aspects of my practice so that I could understand what I needed to do to improve. The reflexive journal was a valuable tool for exploration. Recording reflections in my journal that were

embarrassing or troubling indicated that I was holding little back and that I was reflecting at an appropriate level to reveal important information.

Beyond the quantitative. Studying reflective practice and Levelising can move beyond the quantitative nature of data gathering and analysis. Looking quantitatively at the total and distribution of the reflective statements and distribution of decisions and their modes of Levelising only provides a “scorecard” picture. The information indicates very little about the nature of reflections or decisions. The nature of reflections and decisions is what tells the tale of the experience. It is similar to describing a baseball game using only the statistics. The number of strikeouts, walks, hits, errors, homeruns, or foul balls does not portray the game. The statistics cannot reflect the drama of a pitching duel, the disappointment of a dropped throw that allows a runner to score, or the excitement of a grand slam homerun. To understand the experience, the statistics have to be placed into the context of the game. I had to do the same to answer my second research question; i.e., bring the “box scores” of the reflective statements and decisions back into the context of a workshop session. I returned to the experience through the narrative. The reflective statements provided the content; the analysis of the modes of Levelising provided the perspective; and the decisions provided the results. The analyses allowed me to understand what was going on and report it back in a reconstructed account that revealed more than I could have realized at the time. To be able to see more than I observed was the unique result of the autoethnographic approach and Levelising.

Implications for further research

I chose the autoethnographic methodology because I wanted to get as close to the experience of reflective practice through Levelising as possible. I wanted to feel how discovering my shortcomings affected my practice. I felt that to understand my practice, I had to

look directly at it, not at some possible influence that might be revealed in the observations of another person. I wanted to take it back to the experience.

I encourage other researchers to use the autoethnographic approach as a method of investigating the process of Levelising. As mentioned earlier, I followed Duncan's (2004) lead in taking a conservative approach. There are many forms of the autoethnographic method that would be useful in exploring Levelising. The examples provided by Ellis (2004) and Spry (2011) can be useful in generating possibilities.

The results of this study contribute to the understanding of reflection on practice, facilitation, and the framework of Levelising in first-person action research. Like research on reflective practice in general, studies of levelising have thus far focused on the experiences of individuals and groups whose reflections were facilitated by a practitioner-researcher (Duncan, 2009; Torres, 2008; Gaskin, 2008). This study's unique contribution lies in its focus on how the facilitator thinks and acts in response to others' thinking and actions. This is a relatively new area of investigation in the area of reflective practice.

The study demonstrated how integrating Levelising's unique framework for reflection enabled a more complete understanding of a facilitator's practice and how reflection on actions informed his day to day decisions. The Levelising approach provided an opportunity to explore the assumptions, values, beliefs, and biases that influenced the facilitator's practice. However, one must be cautious in drawing conclusions based on one such study of Levelising. This fledgling area of research on reflective practice is ripe for further research.

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Appendices

Appendix A

Office of Research Research Compliance Services INFORMED CONSENT STATEMENT

Oak Ridge National Laboratory
“Improving Facilitation Through Levelising: Reflecting In and On Practice”

INTRODUCTION

You are invited to participate in a doctoral dissertation research study. This research project focuses on the workshop facilitator’s experience as he engages with you and other participants in the management development workshop. He will seek to understand his practice in terms of a reflective practice model called Levelising. His research questions are as follows:

1. At what levels of the Levelising model did the researcher engage during the study?
2. How did Levelising inform the decisions the researcher made in attempting to improve facilitation of professional development workshops?

INFORMATION ABOUT PARTICIPANT INVOLVEMENT IN THE STUDY

Participation in this study is voluntary. Participants will **not** be required to do any extra work than what is already required by the workshop. Participation in the study will consist of attending eight (8) two-hour sessions meeting weekly over eight weeks.

The researcher will be keeping a written journal that will include descriptions of significant episodes or interactions that take place during the workshop sessions. These entries may include quotes from workshop participants and paraphrased statements that may be attributed to individuals. Pseudonyms will be used in lieu of the actual names of workshop participants.

RISKS

There is *no inherent risk* to being involved in this study. To protect the privacy and confidentiality of those volunteering to participate in this study, all real names or other identifying information within data will be replaced with pseudonyms for purposes of data analysis and reporting of findings.

BENEFITS

The results of this study will contribute to the improvement of the researcher’s facilitation practice. The results will also contribute to the literature on collaborative learning, reflective practice, Levelising, and corporate professional development. A summary of the dissertation resulting from this research will be shared with volunteer participants upon their request. The participants that read the study will become more

_____ (Initials)

aware of how they interact in professional development settings and how this interaction might factor into the decisions by the facilitator.

CONFIDENTIALITY

No identifying personal reference will be made in oral or written reports of this research that could link volunteer participants to this study. Only the researcher will know the actual names of volunteer participants. Informed Consent Forms will be kept securely stored in the office of the dissertation advisor of the researcher, at A519 BEC, University of Tennessee. The researcher's reflective journal(s) and non-electronic artifacts will be kept securely stored in a locked cabinet in the researcher's office at Oak Ridge National Laboratory, 1 Bethel Valley Road, Building 4500N, Room H032, Oak Ridge, TN, 37831-6199. Electronic data will be stored in a file in the researcher's password-protected computer. All data sources consisting of reflective journal(s), artifacts, and electronic files will be destroyed upon completion of the researcher's doctoral dissertation. Informed Consent Forms will be stored for three years following the study.

CONTACT INFORMATION

If you have questions at any time about the study or the procedures (or you experience adverse effects as a result of participating in this study), you may contact the researcher, Don Creekmore, PO Box 2008, Building 4500N, MS-6199, Oak Ridge, TN, 37831-6199, or (865) 241-2435 or (865) 603-1153. If you have questions about your rights as a volunteer participant, contact University of Tennessee Research Compliance Services of the Office of Research at (865) 974-3466, or contact the Oak Ridge Site-wide Institutional Review Board (ORSIRB) at (865-576-1725)

PARTICIPATION

Your participation in this study is voluntary; you may decline to participate without penalty. If you decide to participate, you may withdraw from the study at any time without penalty and without loss of benefits to which you are otherwise entitled. If you withdraw from the study before data analysis is completed your data will be destroyed.

CONSENT

I have read the above information. I have received a copy of this form. I agree to participate in this study.

Participant's signature _____ Date _____

Researcher's signature _____ Date _____

Appendix B

Summary of Duncan's (2009) Levelising Categorization Taxonomy

Level	Discourse Patterns of Reflective Statements
I	Recount
	Establish Context
II	Reflect-in-action
	Acknowledge uncertainty
	Analyze
III	Personal experience
	Personal values
	Universal truths
IV	Specific other people
	Non-specific other people
	Other contexts

The session seemed much more planned. This is not a bad thing, because I had spent time prior to it, doing just that (see reflections 7/14/09). I was not rushed prior to the session. I arrived early and ~~gotten~~ physically arranged my notebooks, sat out my agenda, and I felt more relaxed. This actually felt strange, but overall I recognize the benefit of doing the preparation prior to the session. [REDACTED] EN joined the group today as a participant. I had her ~~intro~~ introduce herself. It turns out she knew most of them through her support role.

My intent was to follow the agenda prepared by [REDACTED] TD, but not try to attempt to replicate what I had observed him doing in past workshops. I know that we have very different styles, and I have to trust my own abilities and instincts. The agenda had topics/times noted. However, I realized that I did not have any way to keep up with it. I knew I had to rely on someone else to keep me on schedule.

While reviewing for the session I had a sense that we had covered the topics earlier. That sense caused me to feel a bit worried that people would think that their time was wasted. There are busy people, and wasting their time is something they will not put up with. They also represent a more diverse number of organizations than we have had in the past. ~~This~~ The way they judge the course's value and communicate it to others can impact (positively & negatively) the future of all of the workshops. So, they must see tangible value, consider their time well spent, and feel challenged by new ideas.

The workshops we are doing are different (at least we think so) than the other professional development courses sponsored by ORAL HK's ODT group. They mostly contract organizations to come in and "teach" people "about" a topic. There is a semblance of the "how," but that is difficult in a one-day class. We are the participants & weeks to explore the "about" and have the chance to learn the "how" by actually doing it.

I have sensed that in the previous workshops that it takes a few weeks for folks to begin getting it. As a result, I am more patient in expecting people to become more engaged. Of course, there are some people that won't embrace it as we would like them to, but that does not stop me from trying. Right now, I think everyone that has attended, seems to see value, and are even interested in setting goals and completing the action plans. In fact, this is the first time we have stressed the "Dream Inventory." I, personally, was uncomfortable asking folks to write down their dreams. It was hard for me to do, and I suppose, I projected my lack of ability on to others. This group seems to have really taken to that activity, better than I had imagined. What was so difficult about it for me? Why? Could it have been my depression? I have been able to encourage the group to complete the dream exercises, by making the connection to goals →

The session began with having the group read the chapter on Goal Setting and Action Plan. From my experience last week, I planned on using the thought questions to guide our conversation. The use of the thought questions worked very well. I am not sure if it was

Because of their formal and connection with the key concepts. Or is it because of how familiar I was because of the run-through with CB? For whatever reason their use helped keep me focused and I have to presume helped the group see how they tie to topic. I am getting a more and more sense of how important it is to prepare before each session. You would think that after so many years training & facilitating & working with groups, I think that I have sort of liked the spontaneity of "winging it" and all that it takes to keep a group going. I think our believing that it is more exciting for me than it is for the group. I need to listen more to what [redacted] & [redacted] have to say. They are trying to give me the perspective of the group, not just what we they see from co-facilitator / professional.

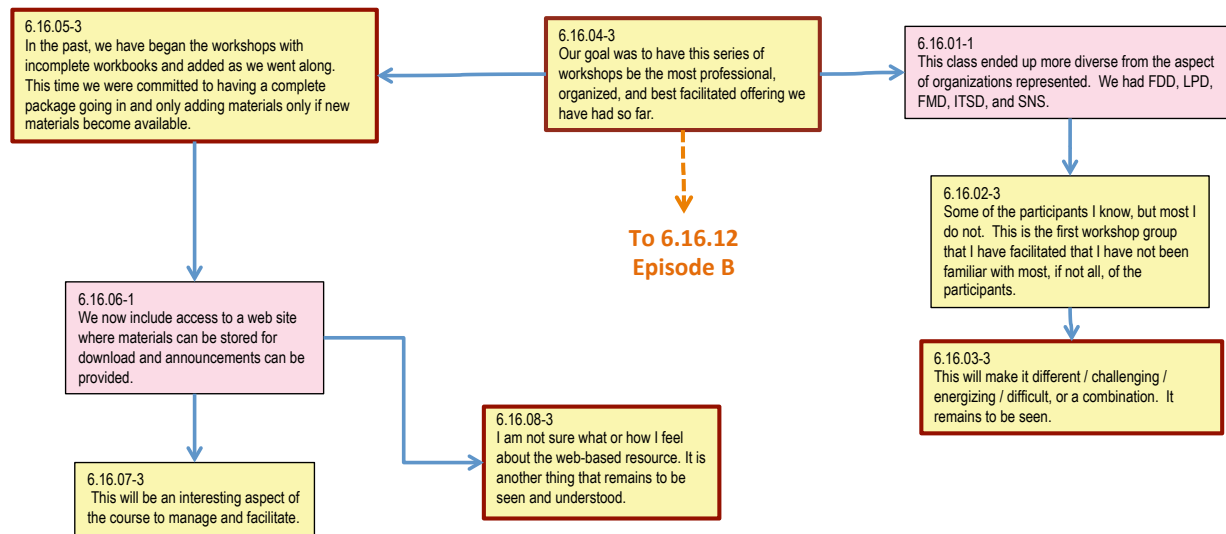
I felt "in control" of the session, but not so controlling as to be in a T-1 position. [redacted] pointed out that he saw it being more T-2, which he thought was appropriate for this group & subject. I am sensitive to being labelled as anything other T-3. However, I agree that T-2 is not a bad thing, especially in this situation. I have to be more sensitive to what perspective the group takes when approaching the ~~course~~ course, than how look at it. It does bother me that I may be putting things in my own frame without regard for the others. Or, I may be trying to force the participants' perspective to be different without knowing what their perspectives are. Why is my ~~own~~ perspective better? By trying to do this

am I actually exhibiting T-1? I wonder how well I would recognize this without having [redacted] observing? How could I find out from the group? What clues could I pick up on from the group, or what should I be feeling or experiencing that can let me know where I am in the types? Of course, there is no right or wrong type. But, I would like to be aware in order that I not find myself locked into one that is inappropriate for the situation. Of course, that is one reason for this project. I want to become more reflective/aware of this and other aspects of my facilitation.

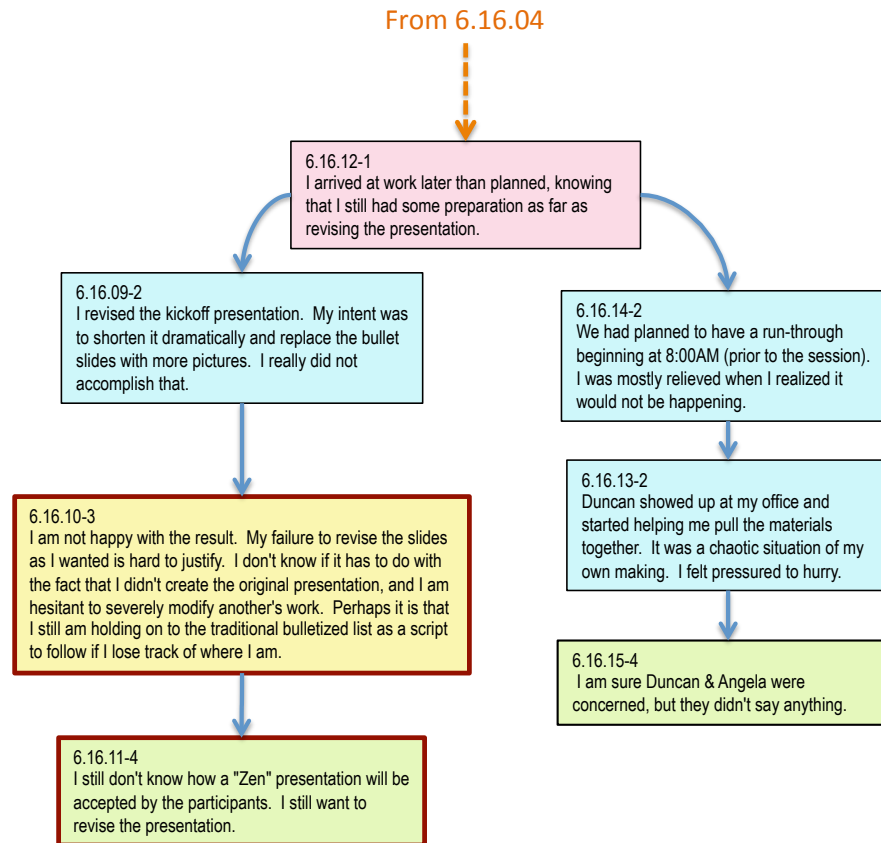
My facilitation benefitted from the preparation that I took prior to class. I had to make this a part of each future session. In fact, as I was in the midst of the session, an idea struck me. How is facilitating these sessions different than how [redacted] performs his coaching with individuals? Why should it be different? How would ~~intentionally~~ intentionally facilitating the sessions from this perspective change what I do, and what the participants experience be? How could I prepare myself to do that? I could draw on my experience with [redacted] coaching, and also bring my own own experience in helping others reflect & generate new perspectives. After the session, I asked [redacted] to allow me to do a run through prior to the next session to let me practice a one-on-one coaching technique. She agreed. She will read the materials & complete the action plan activities before next Monday. I will spend an hour with her. We will see how it works out.

I felt the session was very good, and I have exciting ideas for helping me make it better.

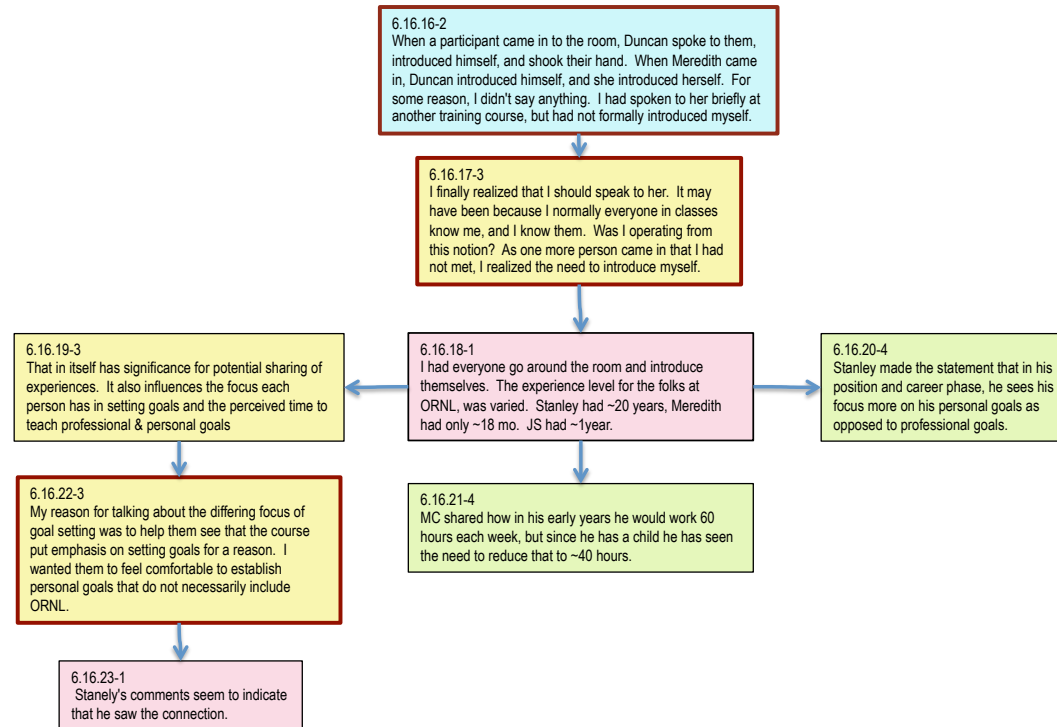
Appendix D



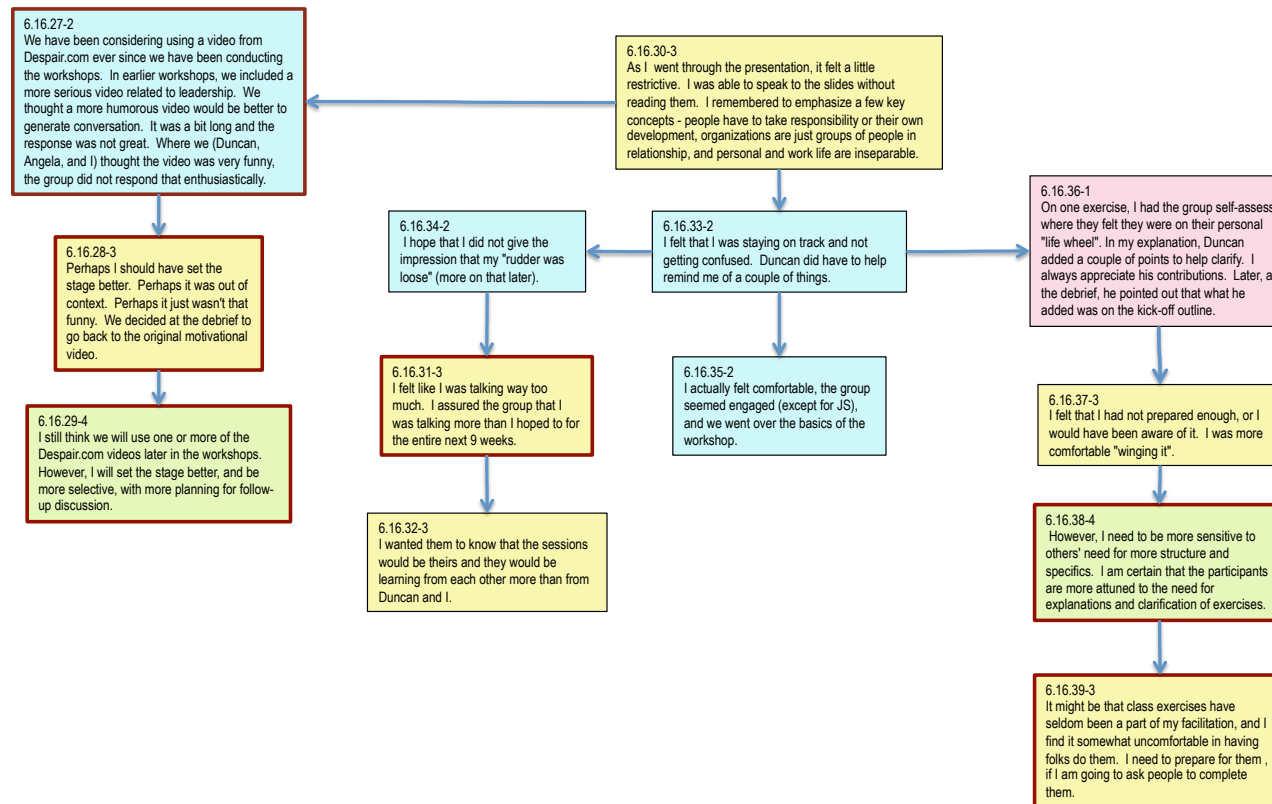
Episode A



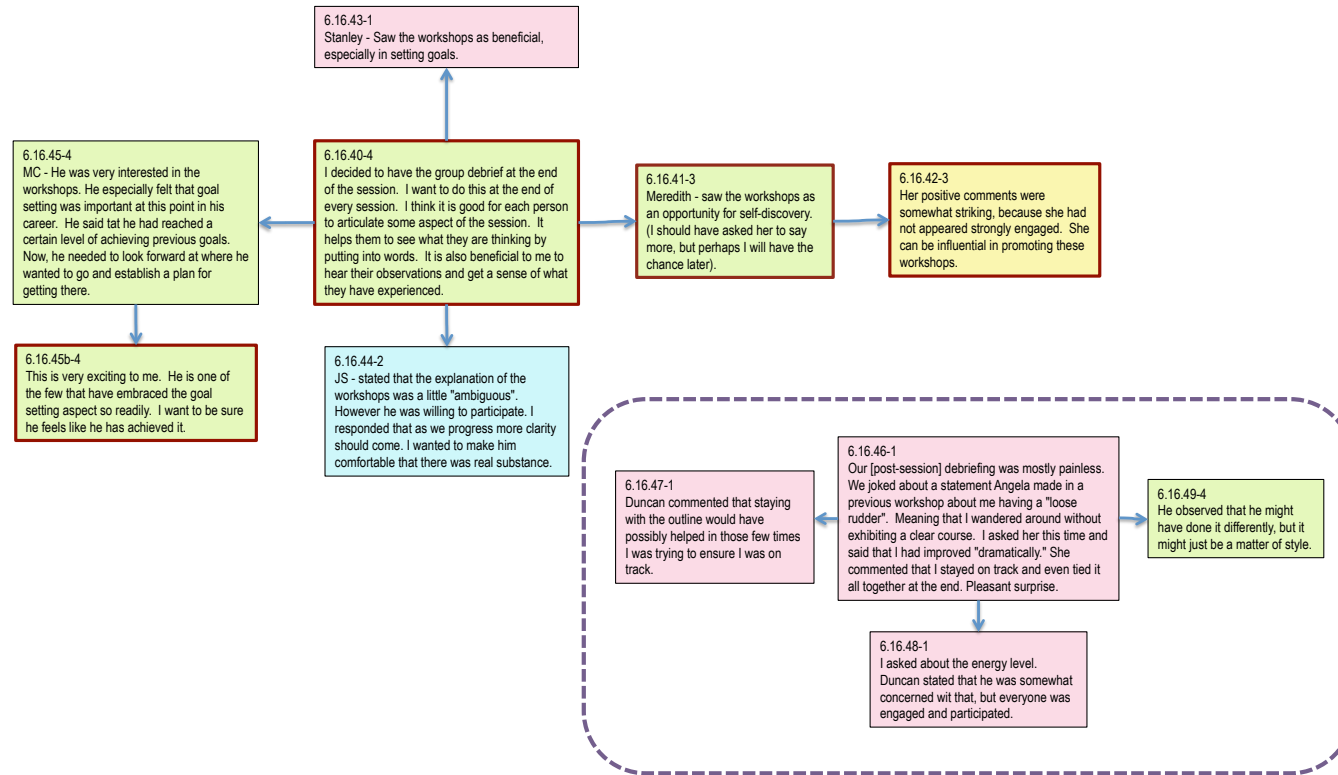
Episode B



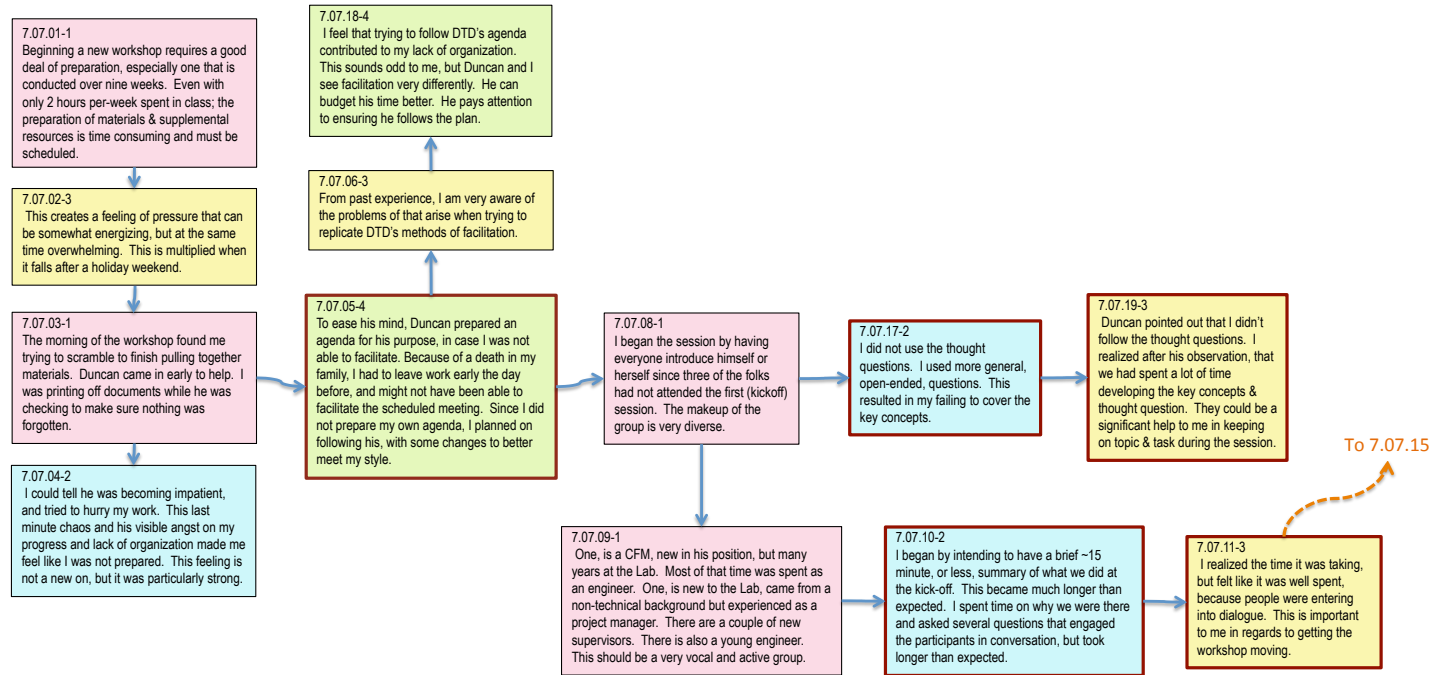
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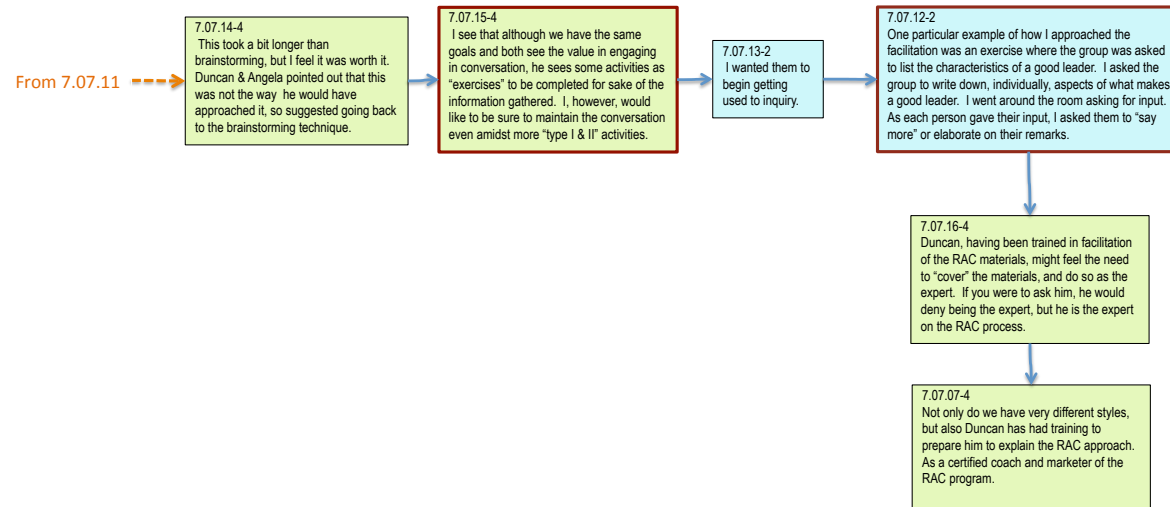
Episode D

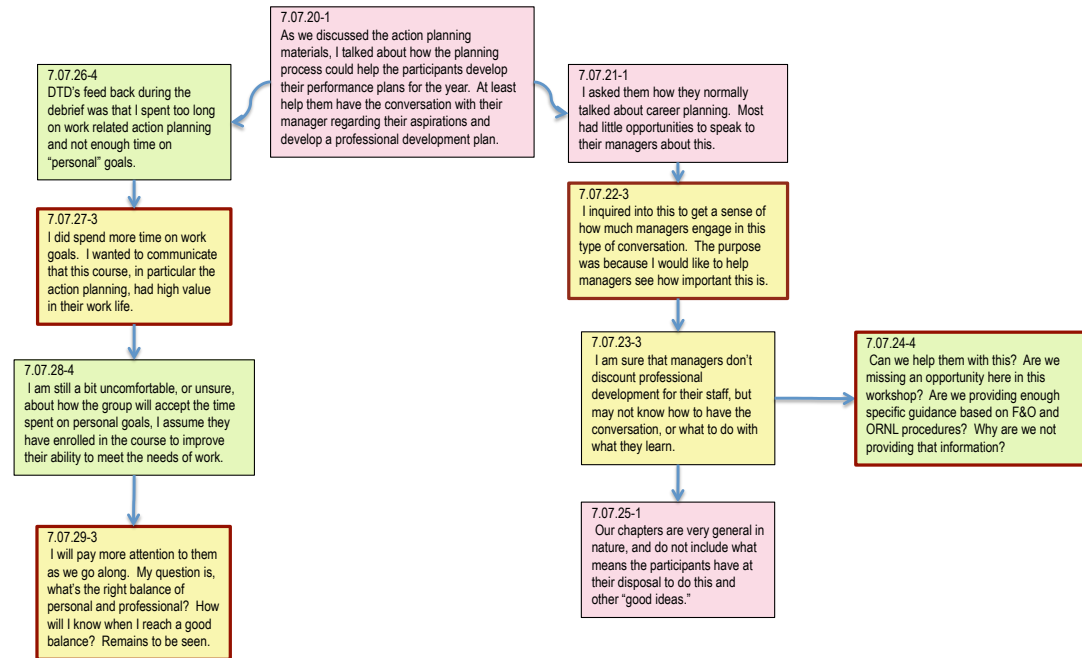


Episode E

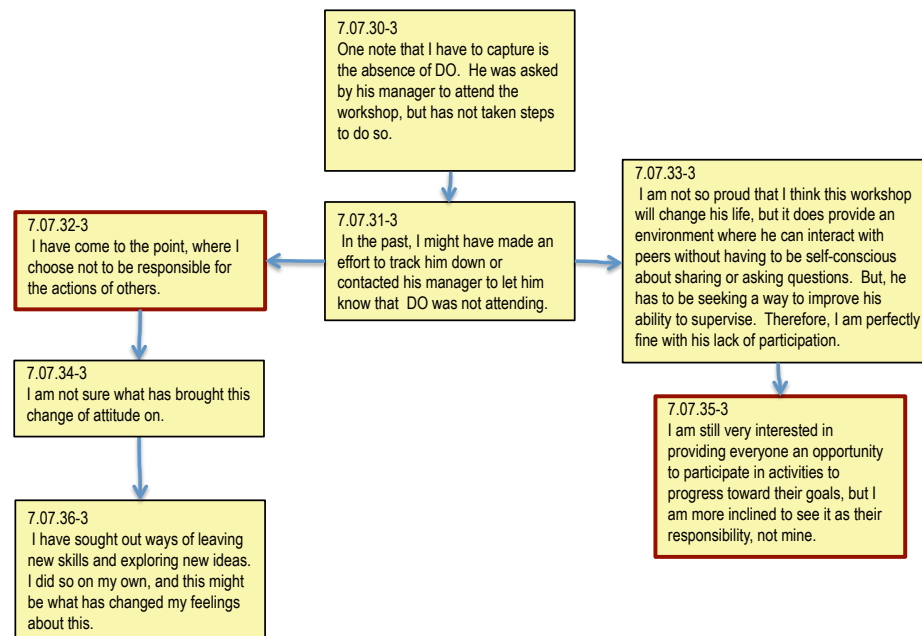


Episode F (1 of 2)

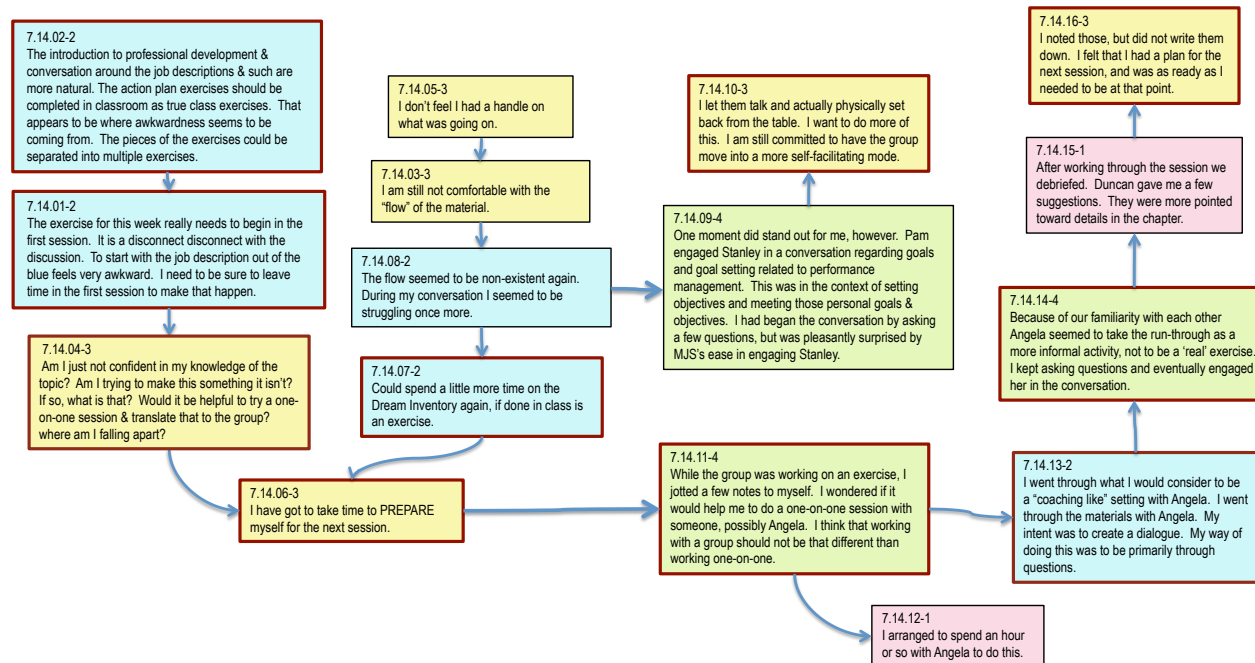


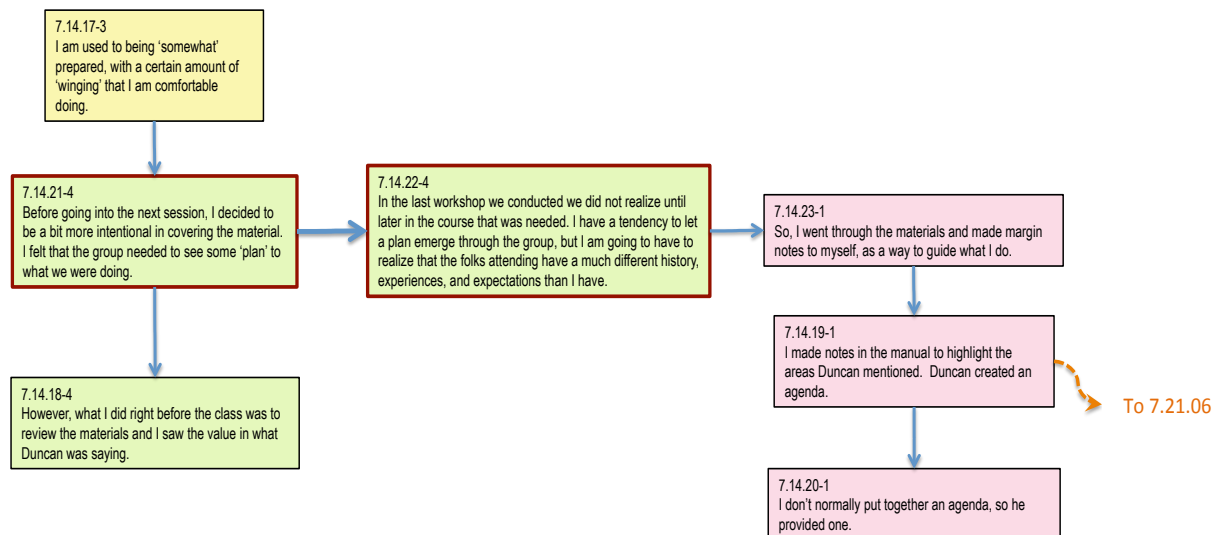


Episode G

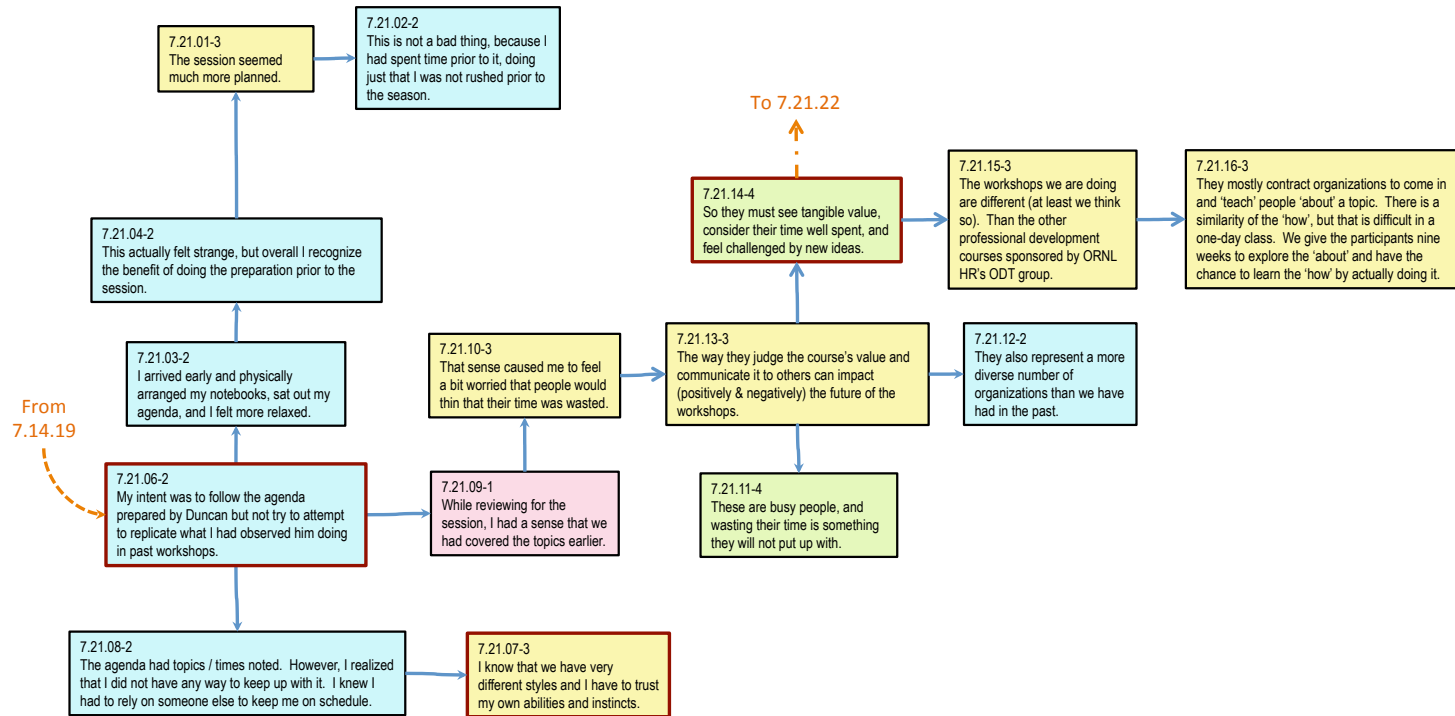


Episode H

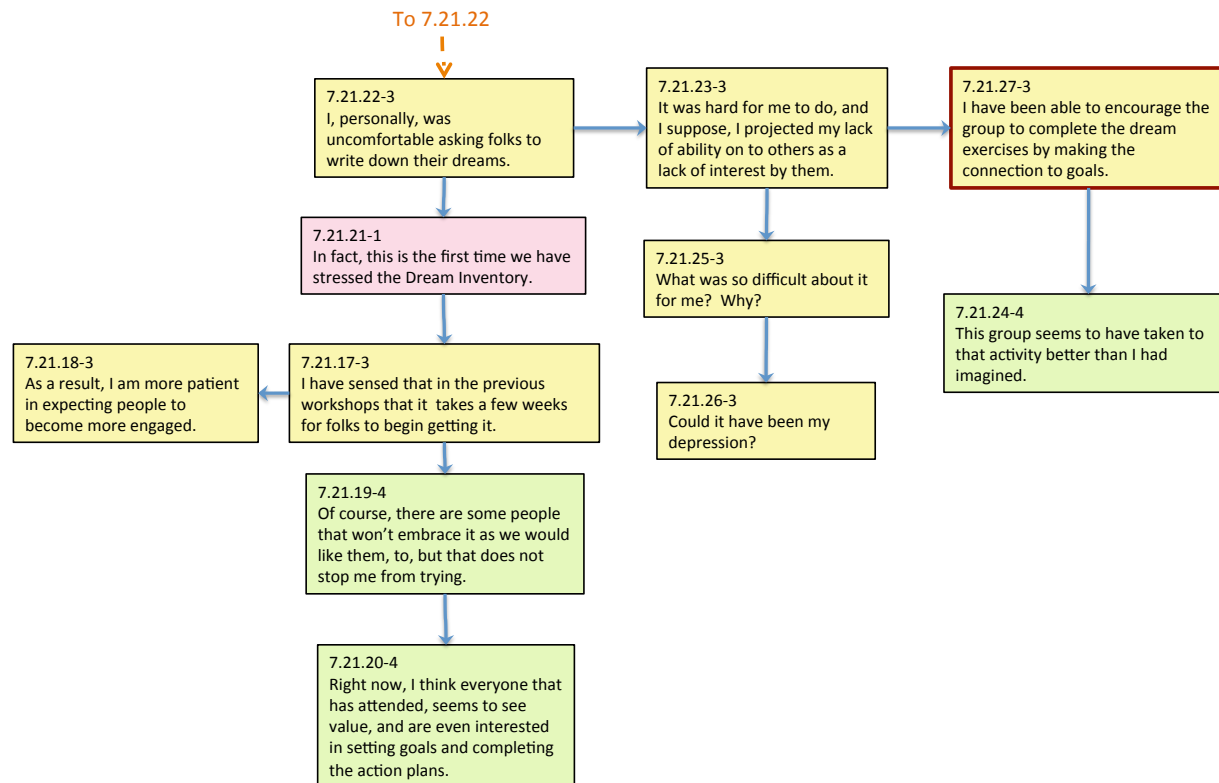


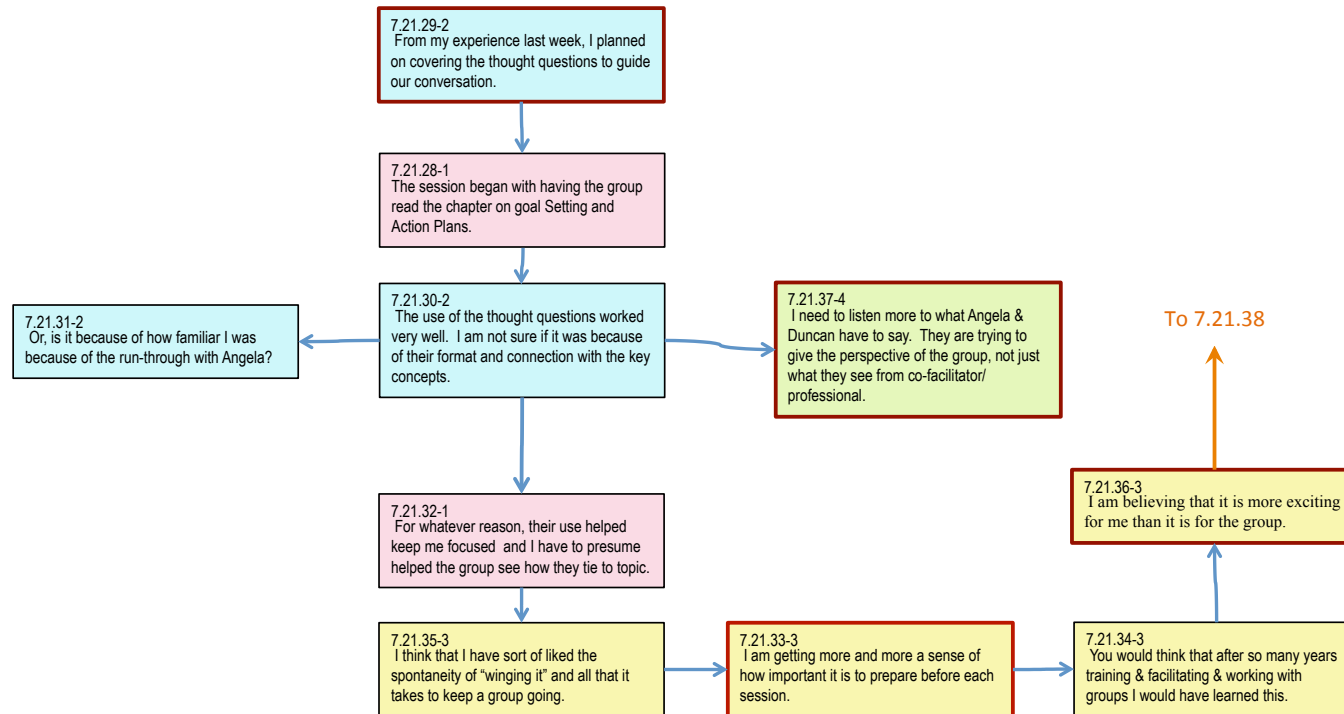


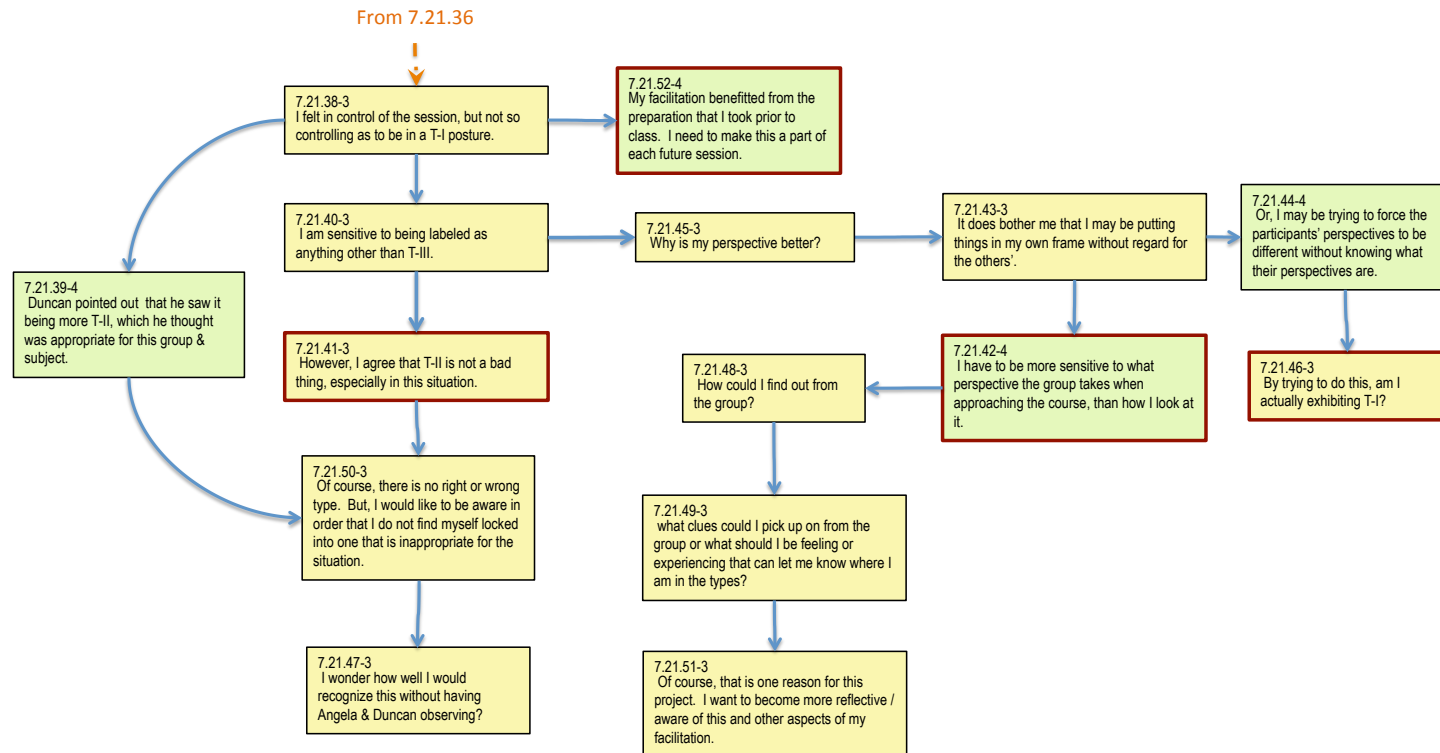
Episode J



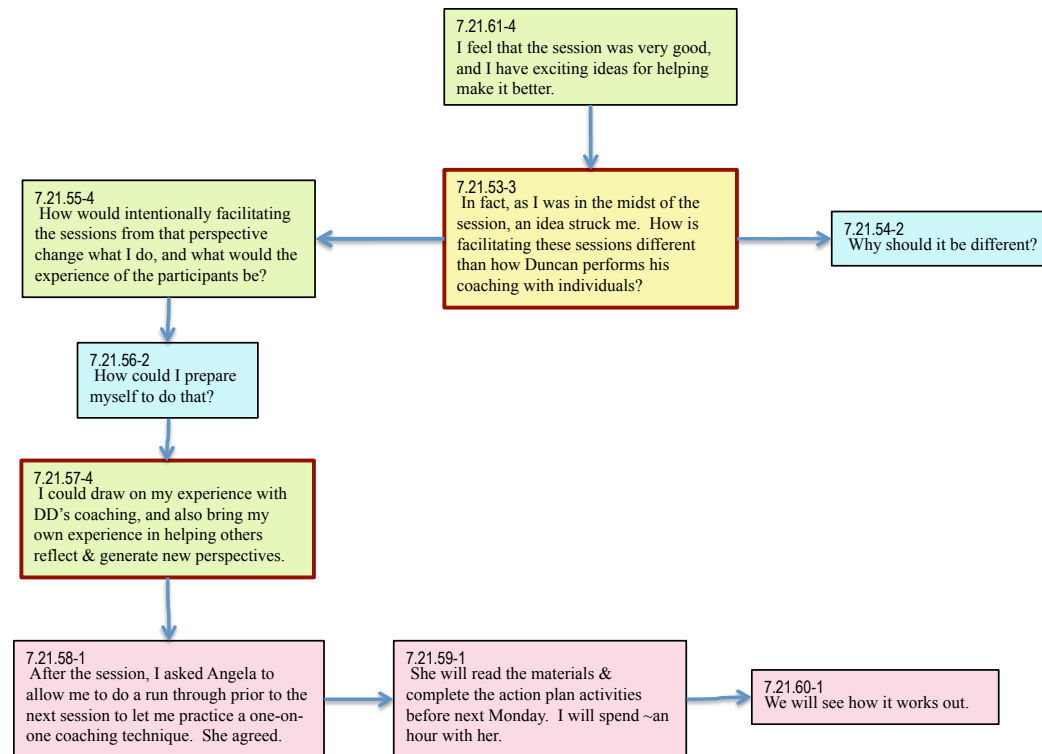
Episode K (1 of 2)



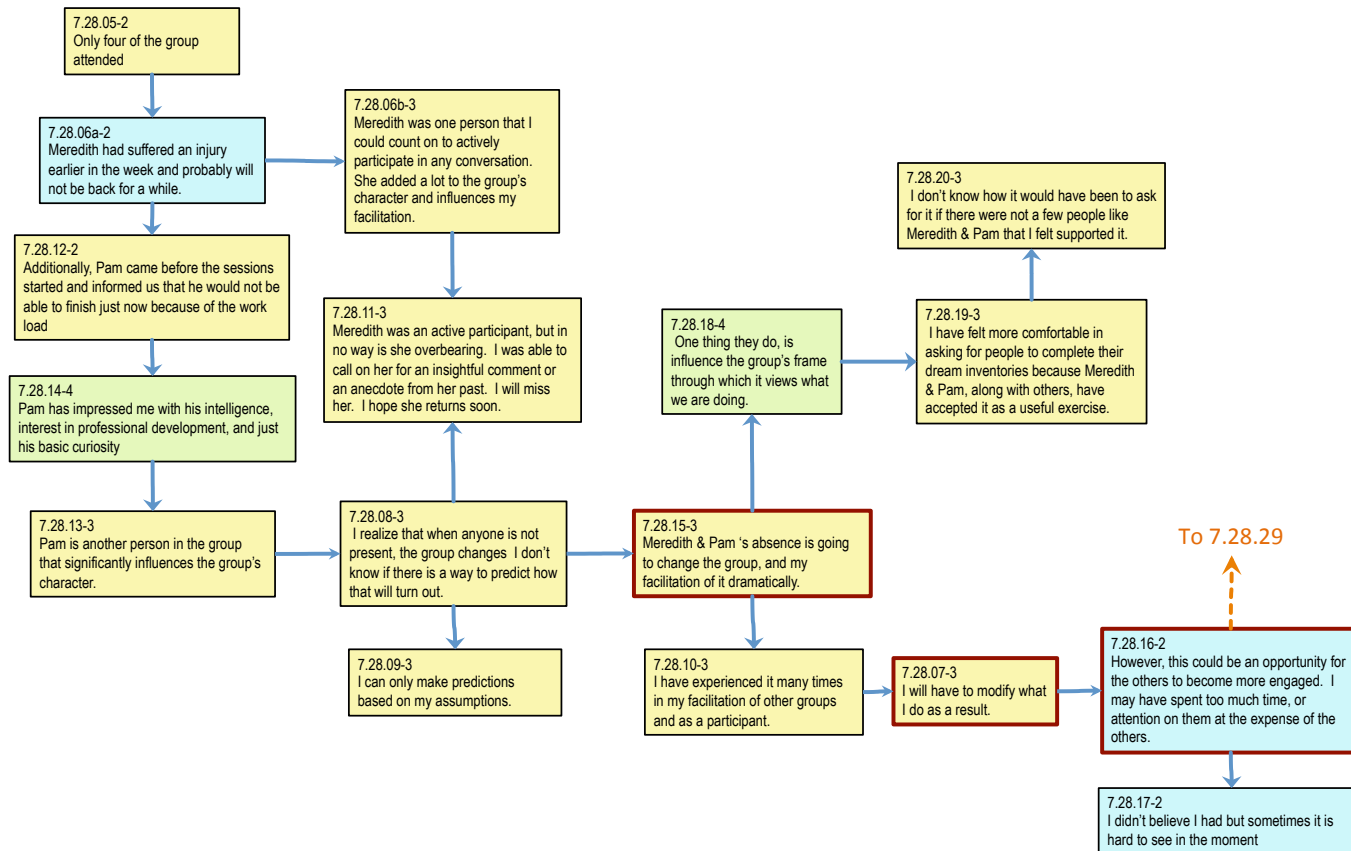




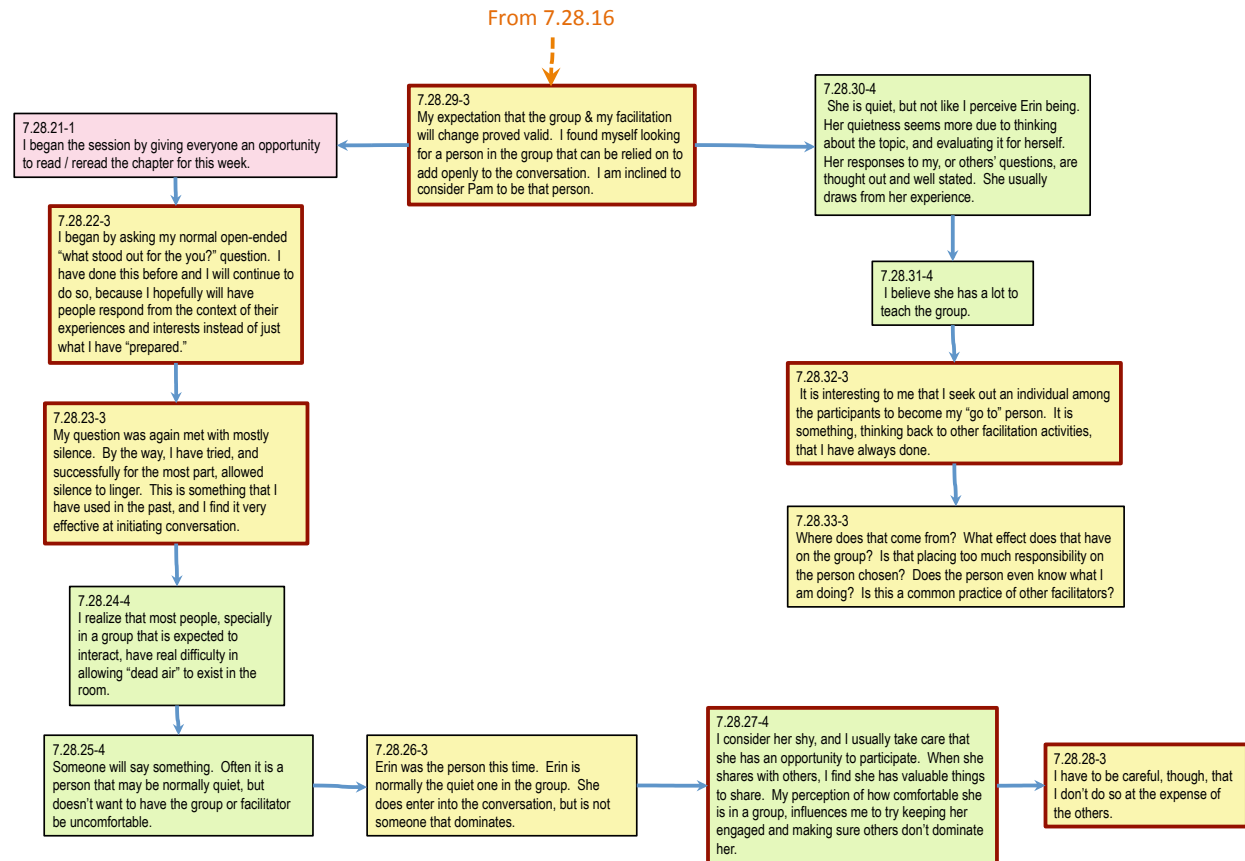
Episode L (2 of 3)



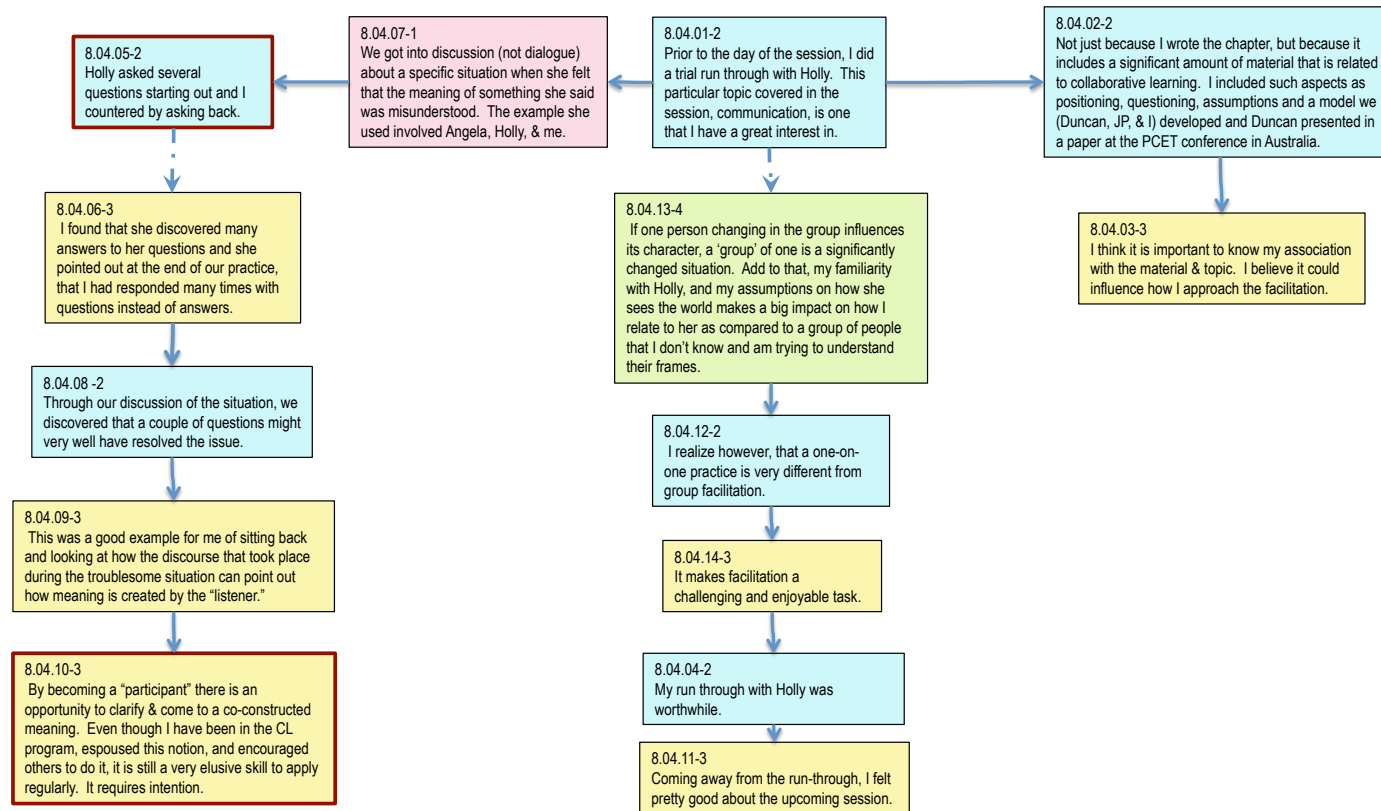
Episode L (3 of 3)



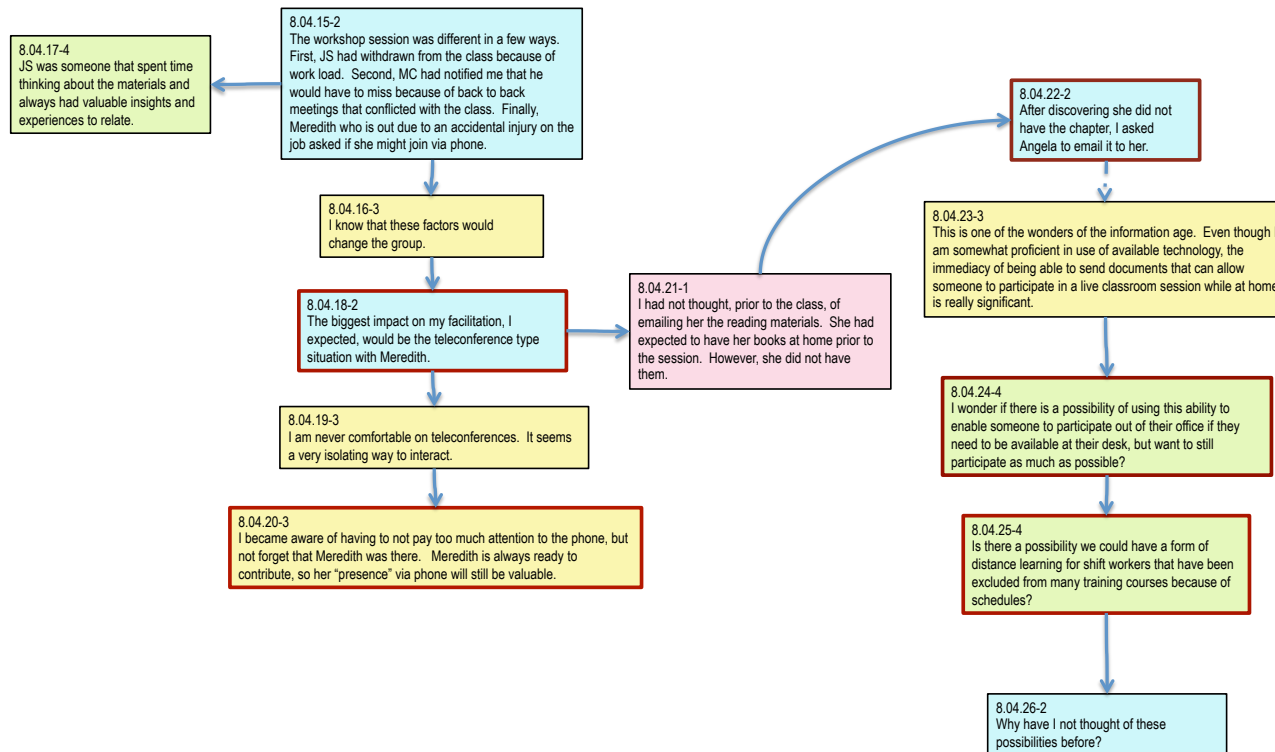
Episode M



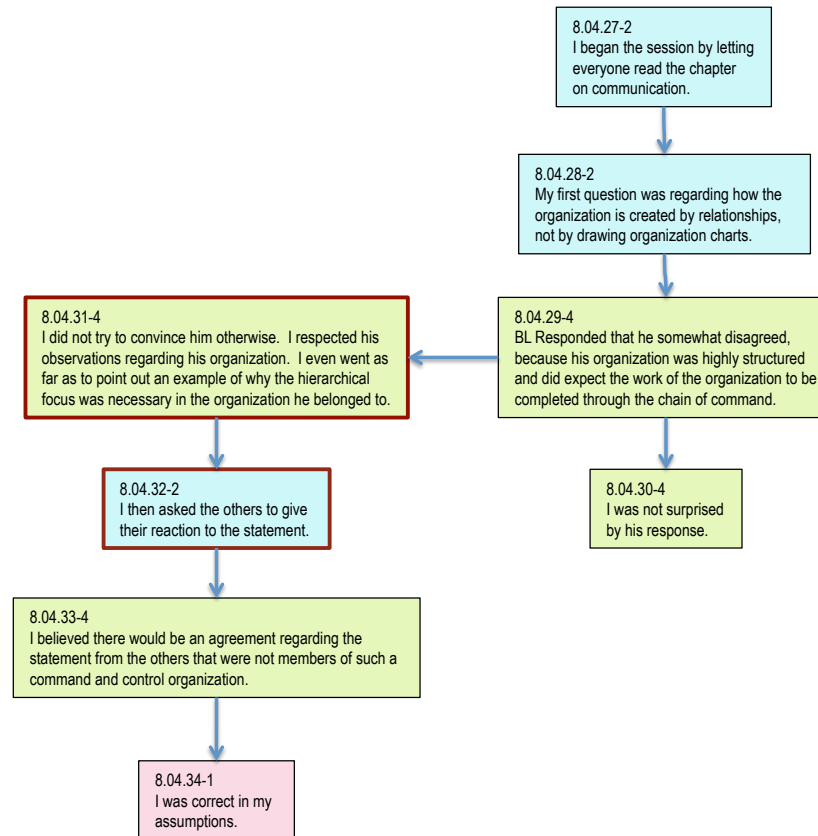
Episode N



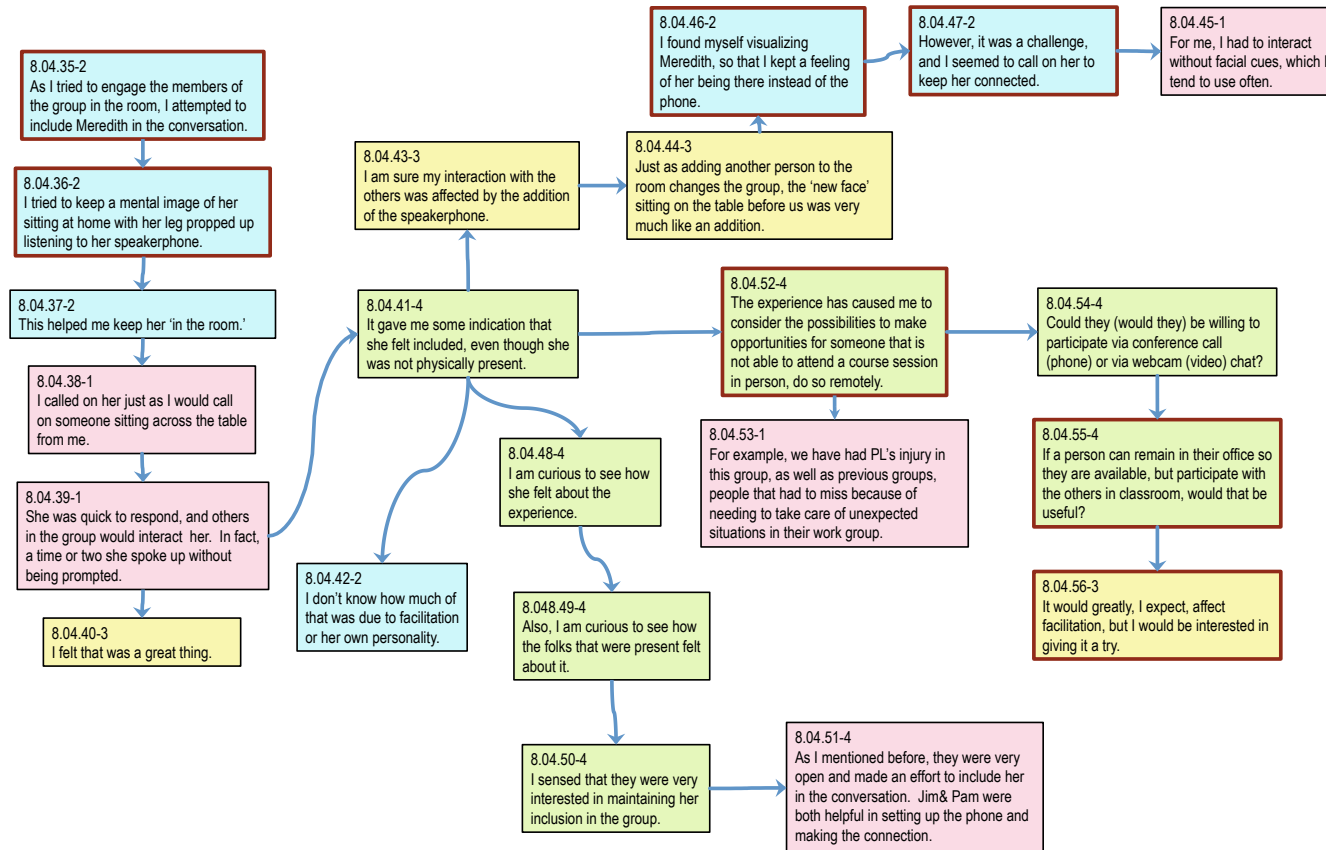
Episode O



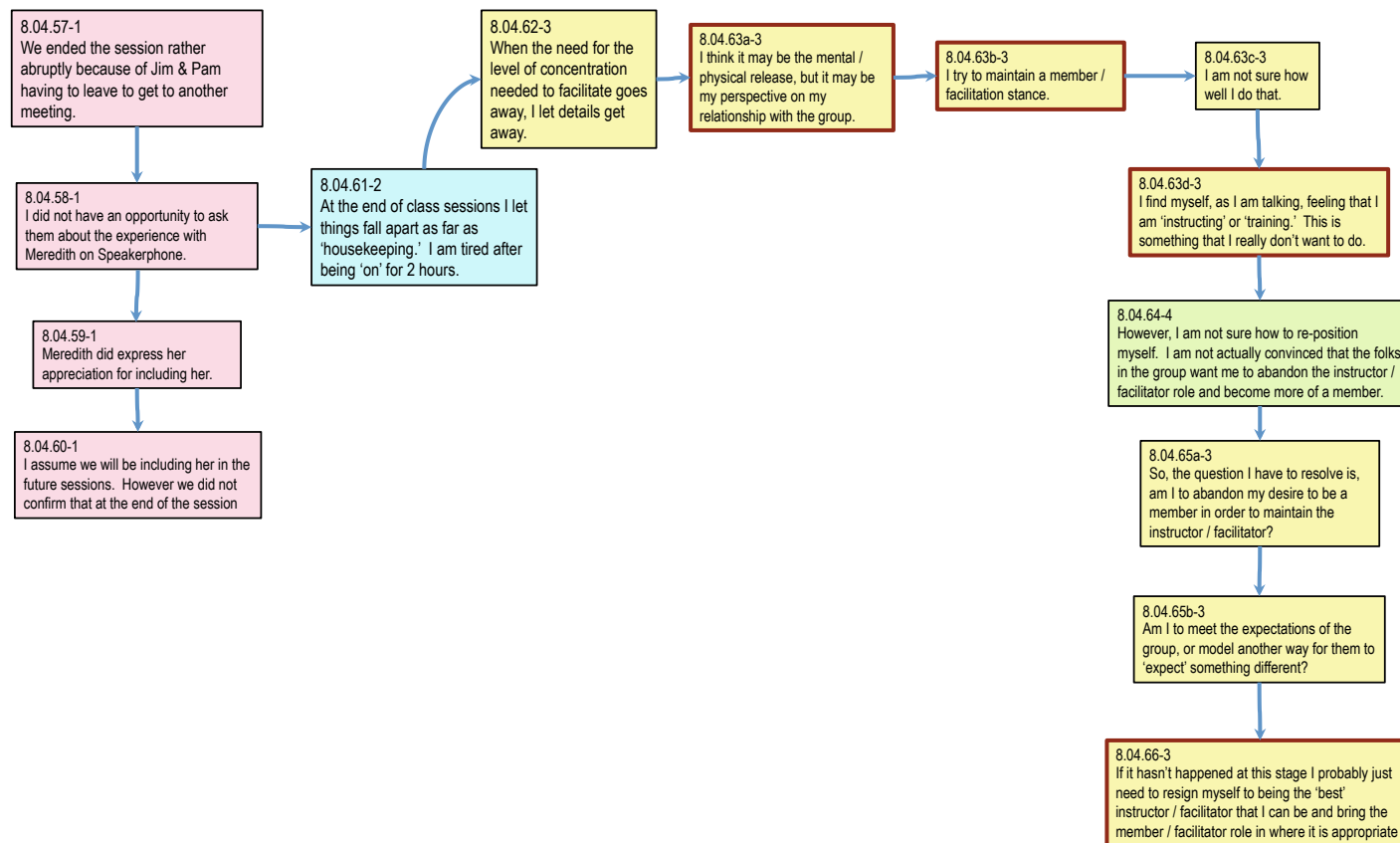
Episode P



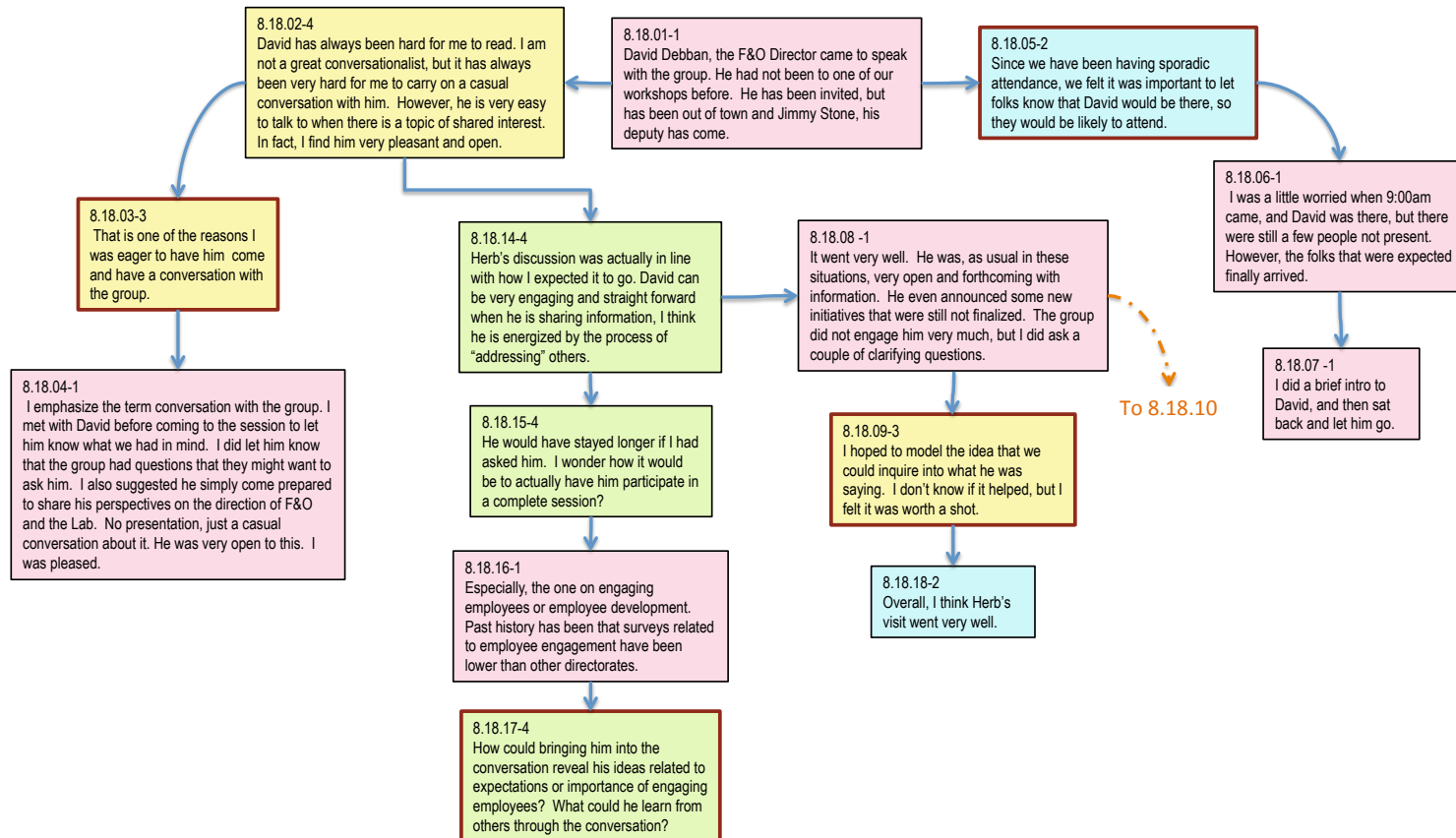
Episode Q



Episode R



Episode S



Episode T (1 of 2)

From 8.18.08

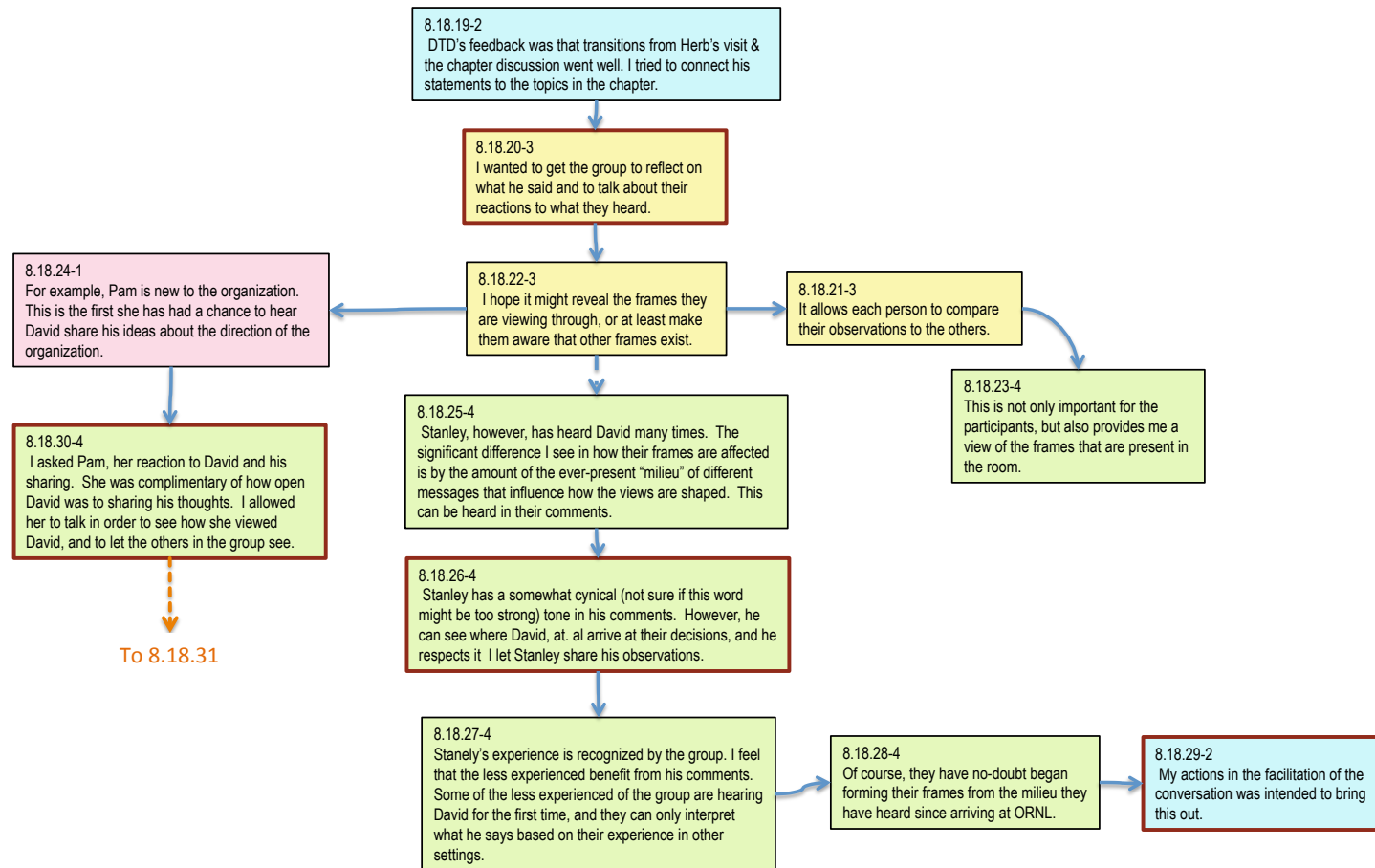
8.18.10-3
We had spent a few minutes in an earlier session gathering questions that the group would like answered. I had not presented them to David beforehand, because I did not want to over influence his topics. However, I did not want the group to feel like I had ignored their interests.

8.18.11-2
Another issue was how to ask the questions without identifying who specifically asked it. For example, BL had asked about the high cost off in-house craft service in fabricating a simple piece of equipment. He felt like the costs are exorbitant as compared to outside companies. He wanted to know what the perspective David had on sending work, outside.

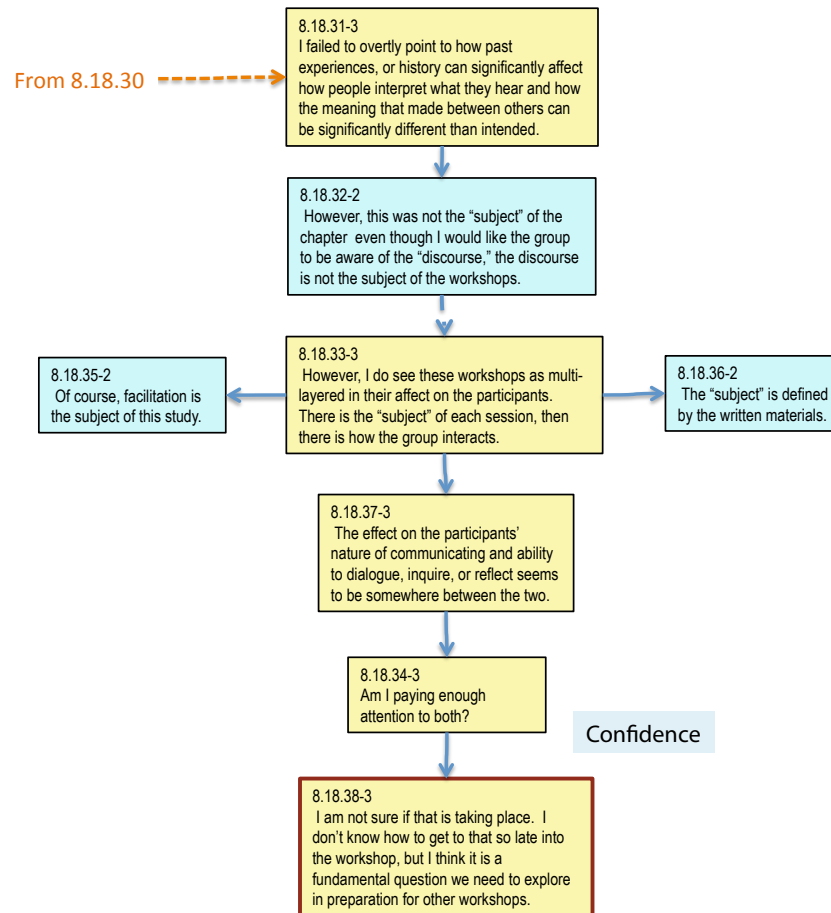
8.18.13-2
David gave an answer that probably did not sit well with BL, but was clear and David gave the basis for his answer. After David had left, BL and I talked about how I had approached the question, and he was satisfied with the way the question was asked and how David had answered.

8.18.12-2
I know that I needed to ask the question without details that would identify who asked, but get a satisfactory answer. I think I did that fairly well.

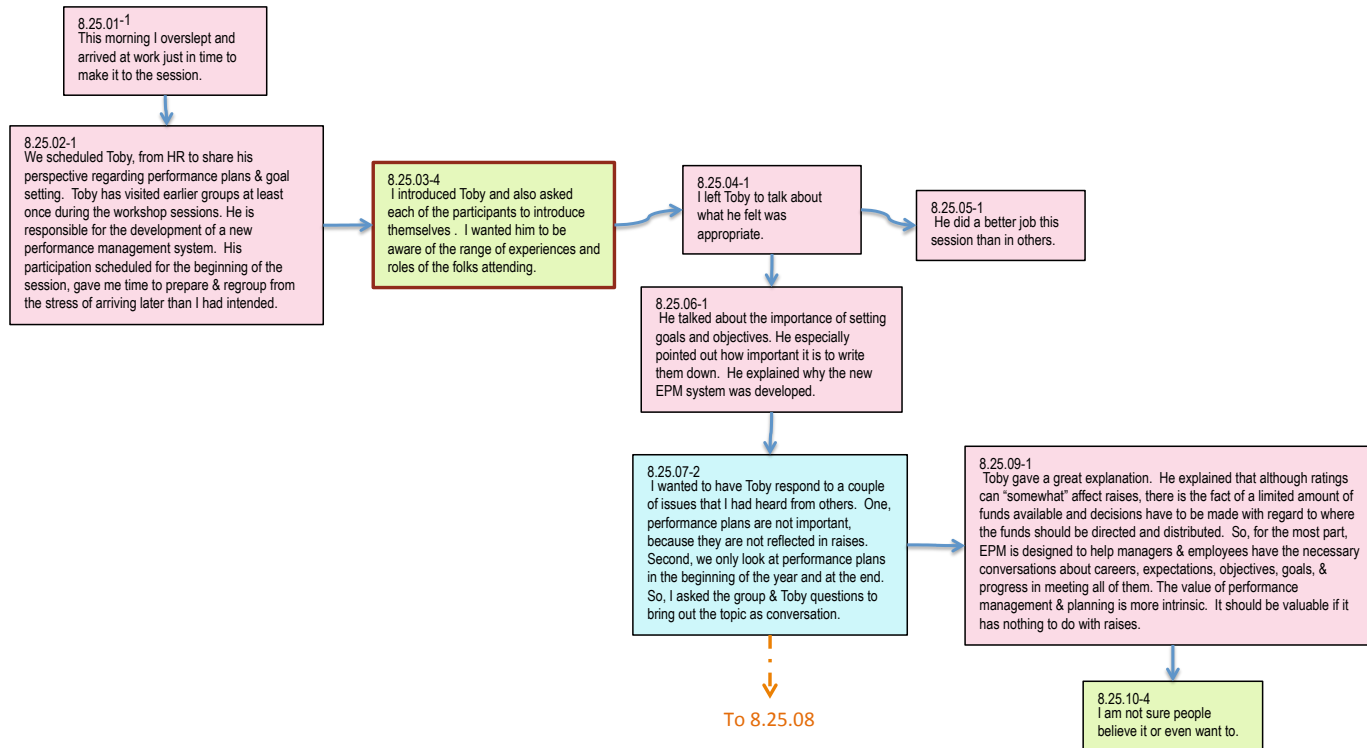
Episode T (2 of 2)

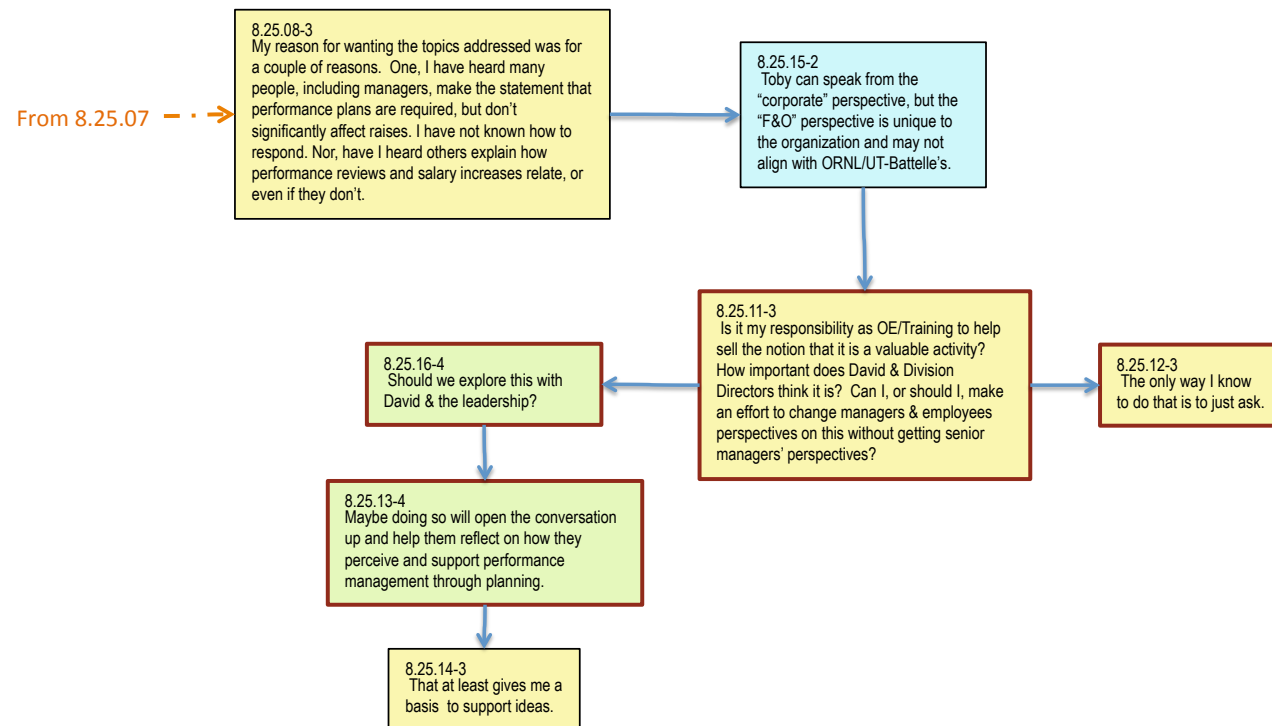


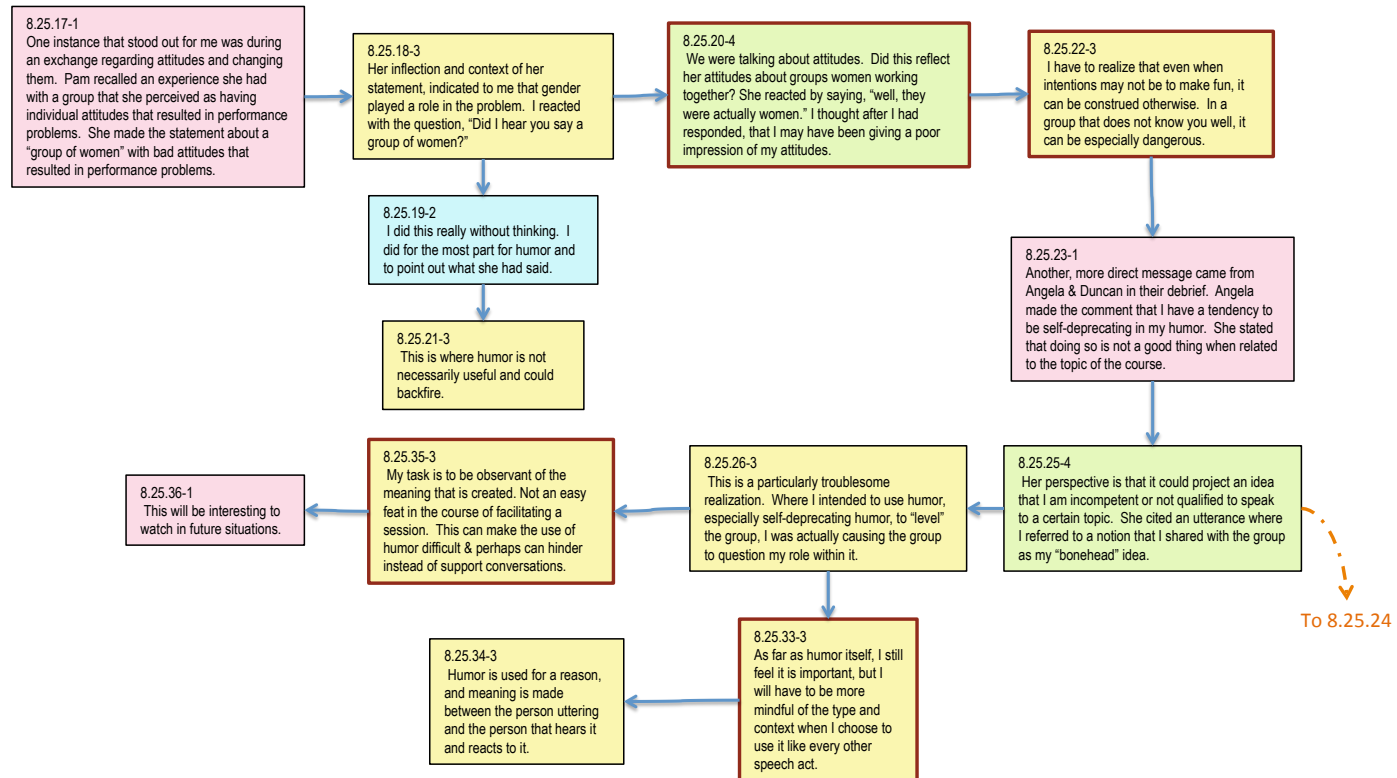
Episode U (1 of 2)

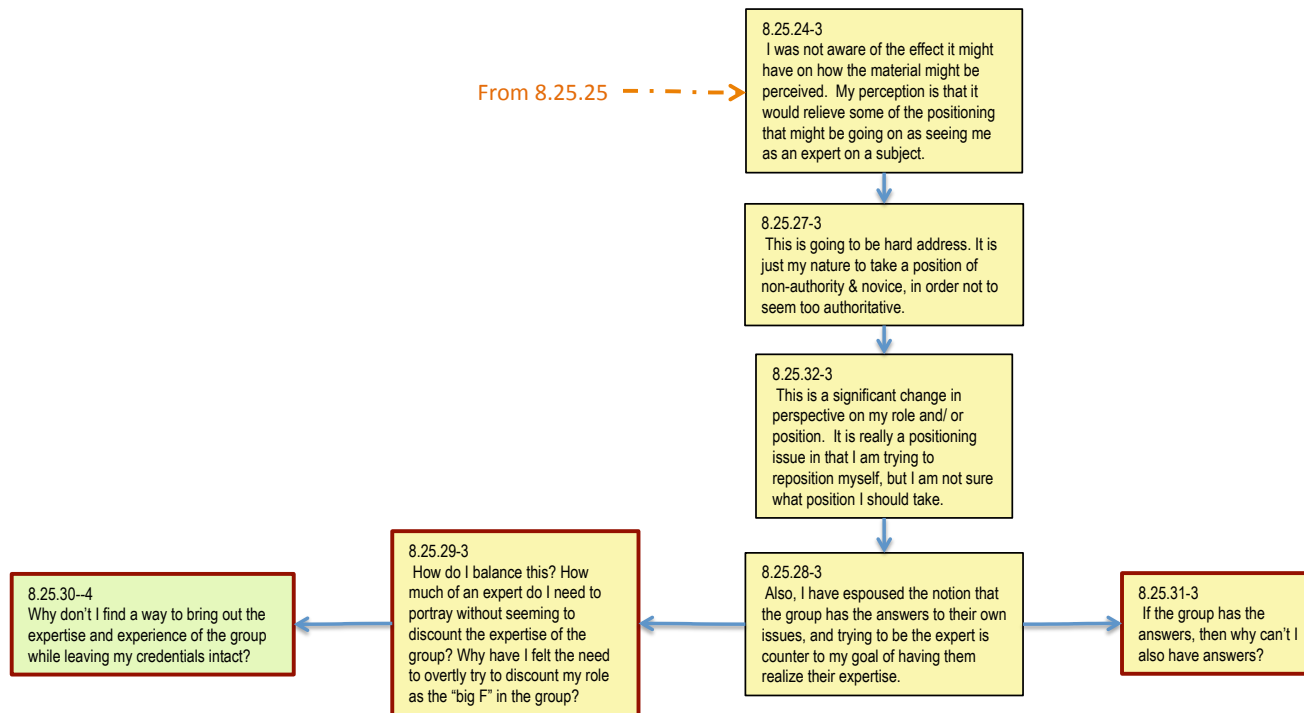


Episode U (2 of 2)

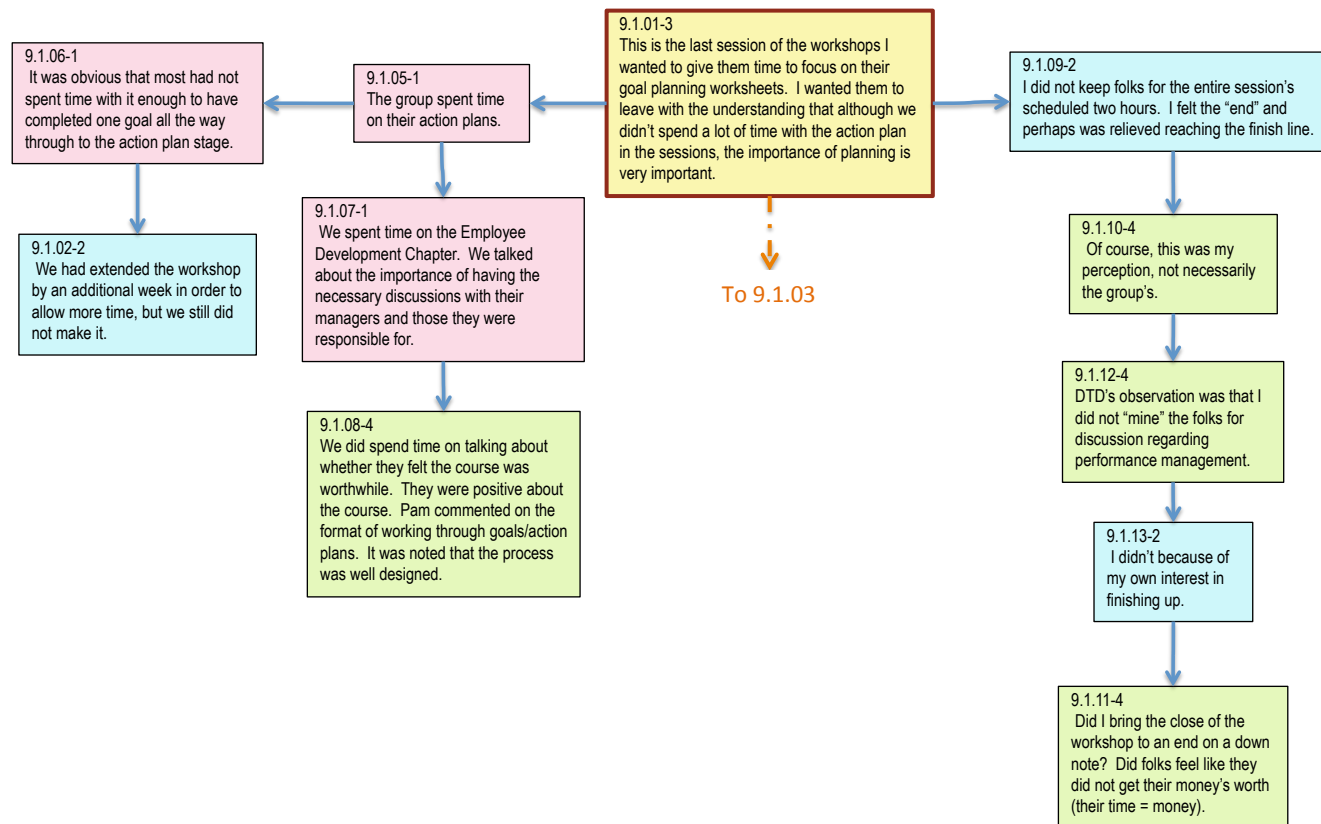


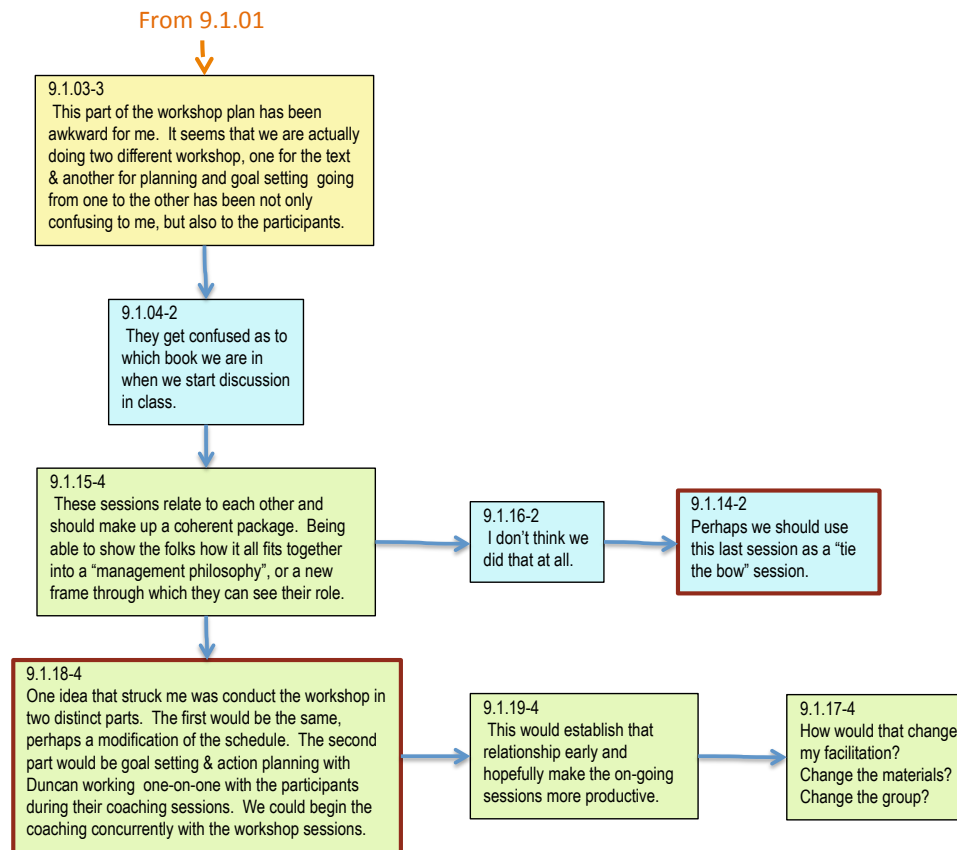






Episode W (2 of 2)





Vita

Willard (Don). Creekmore is on the staff of the Oak Ridge National Laboratory (ORNL). He coordinates and facilitates training and professional development for ORNL's largest Directorate. He has over thirty years experience facilitating training and professional development programs for Tennessee Valley Authority's nuclear power and U. S. Department of Energy facilities. Don holds a M.S. in Educational Leadership and a doctoral and a Ph.D. in Educational Psychology and Research from the University of Tennessee. He lives with his son, Nicholas, in Knoxville, Tennessee.