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**Author**

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Jeanne M. Allen

*University of Tasmania*, [jeanne.allen@griffith.edu.au](mailto:jeanne.allen@griffith.edu.au)

Maureen Innes

[minnes@postoffice.utas.edu.au](mailto:minnes@postoffice.utas.edu.au)

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## Using Appreciative Inquiry to Frame the Appraisal of an Australian Initial Teacher Education Program

Jeanne M. Allen  
Maureen Innes  
*University of Tasmania*

*Abstract: This paper reports on a study that investigated the process and outcomes of using Appreciative Inquiry (AI) in an Australian initial teacher education (ITE) program review. The aim of the study, which drew on a sample of teaching staff involved in this Master of Teaching program, was to gain an understanding of the extent to which the application of the AI framework can be used effectively in the review of ITE programs. AI promotes collegial reflective practice and the generation of positive resolutions and thus aligned with the purposes of the review that were to foster collaboration, strengthen staff morale and, subsequently, build a stronger program for students. This paper provides a perceptual account of the AI review process as reported by the facilitators and a sample of review participants, and contributes to international literature in the areas of ITE program appraisal, organisational reform and Appreciative Inquiry.*

### Introduction

Higher education institutions have come under escalating pressure in recent years to reconceptualise their learning and teaching processes in order to cater for increased numbers of students drawn from larger and more diverse social and cultural groups (Altbach & Engberg, 2006) and to meet the needs of these learners in post-traditional, globalised societies (Giddens, 2003). For example, the Bologna Process has forced universities to confront substantial changes and challenges and subsequently to rethink existing concepts of learning and teaching (European Centre for the Development of Vocational Training, 2009). What is more, effectively dealing with continuous change provides a competitive advantage (Thang & Quang, 2005), a key consideration for most contemporary higher education institutions. In the case of the context of this paper—initial teacher education (ITE) in Australia—it is also incumbent on university educators to ensure that program content and delivery prepare pre-service teachers to meet the requirements of the newly-ratified Australian Institute for Teaching and School Leadership (AITSL) *National Standards for Graduate Teachers* (see AITSL, 2011b), including the ability to teach effectively within the emergent K-12 National Curriculum (see Australian Curriculum and Reporting Authority, 2011). Further, one of the six principles that ITE programs must demonstrate for national accreditation is a demonstration of “continuous improvement” (AITSL, 2011a, p. 1) in order to provide a guarantee of graduate teacher quality and build public confidence in the teaching profession.

In this climate, substantial and quite rapid changes are occurring in learning and teaching arrangements in many Australian university ITE programs. As Lim, Chai and Churchill (2010, p. 6) point out, the challenge is to prepare teachers “who are open to new ideas, new practices and ICT, to learn how to learn, unlearn and relearn, and to understand

and accept the need for change.” In order for teacher educators to meet this challenge, it is essential that they too are provided with relevant and engaging professional learning. It has been shown that one of the most powerful ways in which this can occur is through the sharing of teachers’ own experiences in groups that can operate as reflective learning communities (Hoban, 2002). In addition to providing an occasion for program change and renewal, the program review under discussion in this paper afforded one such opportunity.

The review, in the form of an off-campus two-day retreat, was of a recently-implemented two-year ITE program at an urban Australian university. In this paper, we report on the study that we conducted to investigate the process and outcomes of using Appreciative Inquiry (AI) to frame and appraise this Master of Teaching (MTeach) program review. The aim of the study was to gain an understanding of the extent to which AI can be used effectively in the review of ITE programs.

## **Background**

It has been well documented in the literature that many organisational change efforts are seen as a distressing process, both for those charged with envisioning and leading the change and for those responsible for implementing and managing the change (see, e.g., Kwahk & Lee, 2008; Segerstrom & O’Connor, 2012; Vakola & Nikolaou, 2005). As a consequence, as Nordin (2012) points out, many change efforts fail due to “factors such as lack of commitment, style of leadership, and emotional distress of the employees who have to implement the change” (p. 239).

In the case of the program under discussion in this paper, the review took place less than two years after its initial implementation and we were thus particularly motivated to organise an appraisal process that did not engender any of the stressful or demotivating triggers that might have been associated with the program implementation itself, such as “top-down” leadership behaviour, inflexible arrangements, and a lack of catering to individual differences (Fifolt & Stowe, 2011; Nordin, 2012). We also sought to conduct a process of review that was all-inclusive, reflective and yet forward-looking and which sought to alleviate much of the negativity that can surface in program appraisals (Head, 2000). It was to this end that we borrowed Cooperrider, Whitney, Stavros and Fry’s (2008) AI model as a means of positively framing the retreat. In so doing, we eschewed terminology commonly associated with corporate quality assurance processes by selecting, for example, a term such as “retreat” rather than “appraisal” or “review.” The AI approach has been successfully used previously in a range of arenas (see, e.g., Conkin & Hart, 2009; Maritz & Coetzee, 2012), including in higher education (e.g., Fifolt & Stowe, 2011), as a way to leverage the collective strengths of all those involved in the program under review and to generate positive resolutions.

## **Appreciative Inquiry**

Rooted in organisational behaviour theory and first introduced into organisational management in the 1980s, a key assumption of AI is that:

Every organization has something that works right – things that give it life when it is most alive, effective, successful, and connected in healthy ways to its stakeholders and communities. AI begins by identifying what is positive and connecting it in ways that heighten energy, vision, and action for change. (Cooperrider et al., 2008, p. xv)

It is viewed as a contemporary, strengths-based approach to management that provides a structured focus on reflection, collaboration and envisioning, signifying a move away from those more conventional models that emphasise ways to overcome existing weaknesses and deficiencies (Conklin & Hart, 2009; Fifolt & Stowe, 2011). It also has the potential to leverage the *placebo principle*—that people respond positively to attention (Mellish, 1999)—and the *pygmalion effect*, whereby individuals perform up to the high expectations held of them (Conklin & Hart, 2009). Importantly for this program review, it can be used to generate change through “ignit[ing] the collective imagination” (Watkins & Mohr, 2001, p. 14) and promoting dialogues that can help collectively shape people’s realities and their vision for the future (Maritz & Coetzee, 2012). This can lead to stronger social capital through the establishment and enhancement of relationships of trust, norms and values to achieve mutual goals (Dhillon, 2009).

For the purposes of our work, we applied the AI model through the “4-D” (discovery, dream, design and destiny) Cycle (Cooperrider et al., 2008). Rather than approaching each of the four phases in a strictly sequential or linear manner, as has occurred in other appraisals (see, e.g., Conklin & Hart, 2009), we moved on occasion back and forth between the phases, believing this would facilitate stronger participant engagement. In the *discovery phase*, participants discover, appraise and value what “gives life” (Cooperrider et al., 2008, p. 6) to the program when it is functioning at its best, focusing on the positive qualities that they identify and affirming them as instrumental to future progress. *Dreaming* involves envisioning the best of what might be, both through building upon those qualities identified in the discovery phase, as well as through exploring new possibilities and images associated with a preferred or ideal future. The *design phase* moves beyond vision to shared intention. Participants coconstruct a future “in which the exceptional becomes everyday and ordinary” (Cooperrider et al., 2008, p. 7) by sharing ways in which vision can be enacted through strategies appropriate to the architecture of the organisation. In the fourth phase, *destiny*, participants share ways in which the shared image of an ideal future can be realised and operationalised. Activities in this phase focus on innovation and action that will empower individuals and enhance organisational life (Cooperrider et al., 2008).

In addition to the 4-D cycle, we also drew on the six associated AI *freedoms*, which Whitney and Trosten-Bloom (2003) conceived of as the conditions through which AI liberates power and unleashes human potential. Specifically, we used the freedoms in our empirical study to frame our principal data collection instrument—a questionnaire designed to gauge an understanding of how participants viewed the effectiveness of AI in the program review. We elaborate on the six AI freedoms in the Methods section below.

Before continuing, it is appropriate to acknowledge that questions have been raised about the credibility of AI as an approach to produce organisational change. Effectively conveyed by Williams (2004, p. 359), the major criticism is that AI’s “relentless focus on the positive exudes more than a whiff of Pollyanna; a naïve optimism blinkered against the harsh realities of day-to-day existence.” Nevertheless, as outlined above, we deemed AI to be pertinent to the conceptualisation and framing of the retreat and empirical study under discussion here.

### Using Theoretical Underpinnings of Educational Drama

Of the three review facilitators, two each have extensive backgrounds in drama and drama education at the primary and secondary/tertiary levels respectively. (Both were also members of the MTeach staff in 2011 and one is a co-author of this paper.) Drawing on their expertise in these areas, we were able to further frame the review using theoretical concepts of educational drama. That is, we “populated” the AI model with activities designed in light of the philosophical tenets of educational dramatists such as Boal, Courtney and Neelands.

Our intention in doing so was to further differentiate the review from the usual type of program appraisal process to which staff members seemed to be accustomed and, more importantly, to ensure that the retreat activities were engaging, interactional, and inclusive of all.

There is a substantial body of literature and many well-evidenced arguments in relation to the learning and understanding that evolves through engagement in an educational drama frame, including claims for its contribution to cognitive, social, emotional and moral development. Gallagher and Booth (2003) argue for a broader and more inclusive understanding of drama and theatre as an educative force, stating that theatre educates in “unexpected ways” (p. xi). Many theorists support this view of the capacity of drama in education to change understandings. In his seminal work, Courtney (1990) placed drama into a constructivist frame, stating that when working within a drama focus or parallel world, participants tend to recall the past to inform and enable a negotiation of the present and that, through these actions, a future can be negotiated. This perspective resonates with the AI 4-D Cycle of discovery, dream, design and destiny. Two of Neelands’ (1996) four modes of empowerment in drama—personal empowerment and cultural empowerment—can also be linked directly to the AI approach. In light of these modes, Neelands (1996) claims that theatre and drama are personally-transforming cultural resources that render many invisible influences of culture more visible and discussible.

In addition to the works of these theorists, the conceptualisation and planning of the retreat was particularly influenced by the views of Boal (1996, 2000), as expressed in his “Theatre of the Oppressed.” Boal’s work has been used previously to successfully inform the methodological approach of AI (see, e.g., Maritz & Coetzee, 2012) and proved a powerful tool for us in creating ways to meaningfully engage retreat participants. Boal’s view was that theatre can empower people through enabling them to recognise constraining or “oppressive” contexts in order to act together to change them. He challenged the traditional notion of the “spectator” or “bystander” and theorised that all of us are “spect-actors” within a real and also fictitious world and, as such, we each have a role to play.

Central to the many forms of Boal’s Theatre of the Oppressed is the restoration of dialogue. As Boal (1996, p. 47) states, “whenever there is a dialogue which has become a monologue we want to restore the dialogue.” Such thinking became central to the retreat design. Our aim was to create a situation where all the voices were heard and all points of view valued. Through incorporating educational drama underpinnings into the AI 4-D cycle, we constructed a conceptual framework for the review, as illustrated in Figure 1.

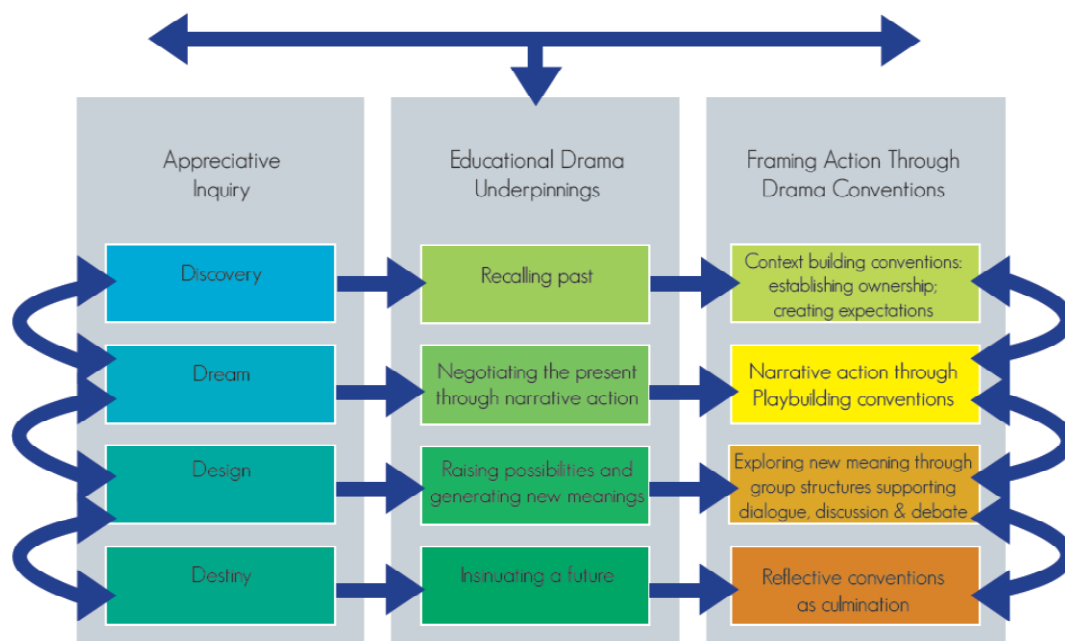


Figure 1. Conceptual Framework Drawing on Cooperrider et al.'s (2008) AI “4-D” Cycle.

## Context

The MTeach degree reviewed in the study is a two-year graduate-level ITE program that was introduced for the first time into an Australian urban university in 2010. The “roll out” of the first iteration of the MTeach was completed by the end of November 2011 and it was therefore timely to review the program from the perspectives of staff involved. The retreat was initiated and led by the MTeach Coordinator (one of the two authors of this paper) in line with the university’s program review guidelines (University of Tasmania, 2012).

The MTeach offers primary and secondary teaching strands through on-campus, mixed mode and fully online modes. Student enrolments across the first two years of the program numbered 221 in 2010 and 361 in 2011. Thirty-two full and part-time staff members had taught into the program during this time and all, including several who had since left the university, were invited to participate, as were two members of the administrative staff (Program Support Officer, Library Liaison Officer). Additionally, all members of the Leadership Team (e.g., Dean, Head of School, Associate Deans) were extended an invitation.

Our decision to invite Faculty leaders was made after some deliberation about whether their presence would cause participants to refrain from fully engaging in the retreat activities. We were aware from our own experiences and from our knowledge of the literature (see, e.g., Ferris et al., 2009) of how the relational dynamics between leaders and their staff can sometimes negatively influence organisational phenomena. However, given the wealth of professional and experiential insights we believed leaders could offer, particularly in relation to the *design* and *destiny* phases of the program review, we elected to invite all Faculty leaders. We were also guided by our and other staff members’ (reported) perceptions that the professional relationships between staff and leaders were for the most part quite strong, and we deemed it important for leaders to “hear the voices” of the other staff. Further, the general

atmosphere or cultural mood of the Faculty was relatively positive, particularly in light of the many changes that had taken place during the previous two years. The program had been well supported since the time of its inception and its “rollout” had been largely successful, as evidenced in, for example, student evaluations of learning and teaching.

The overarching aim that we generated for the retreat was *to foster positive growth in the MTeach through a collaborative appraisal of the first iteration of the program*. The following goals informed the overarching aim:

- To reflect on the 2010-2011 “rollout” of the MTeach and to discuss what has worked well, what has not worked so well, and what could be done differently
- To discuss ways in which we can best progress into the next two years of the MTeach
- To discuss the program at a program level and to share understandings around teaching practice, and
- To discuss how we work as academics.

Once the review process was approved by the Head of School, staff members were invited to attend the non-compulsory retreat over two days in December, 2011. Located across the university’s three quite geographically distant campuses, many staff had to travel to attend the fully-funded event. As suggested by Malvicini and Serrat (2008) and others, the retreat was held off campus in order to provide a more relaxed and social environment than that of the workplace. In what follows, we discuss several indicative examples of activities we incorporated into the retreat schedule. A truncated version of the full schedule can be found at Appendix A.

## The Retreat Schedule

As previously stated, we moved back and forth across the 4-D phases, consciously fusing the principles of the AI approach with the theoretical approaches of drama and theatre to generate a creative synergy. In interplay between the four phases, context building and narrative conventions were set up to enable the whole group to identify their expectations, tell their story, reflect, and begin to think about how those collective stories could instigate change.

An example of this interplay was a shared cooperative activity (“Snowballs”) with the purpose of firing both individual and collective imaginations while still meeting the needs of the discovery phase. Participants were asked to write down their expectations of the retreat. They then created a snowball with their paper and actively engaged in a snowball fight. In the reflective stage of the play, each person articulated an expectation, not necessarily their own. This light-hearted approach provided a flexible structure to facilitate the abstracting, constructing and reconstructing of the AI model while also enabling the group to connect and function together, rather than individually.

Once we moved into the dream and narrative building phase, we used playbuilding strategies to create a collage of narratives. Playbuilding (also known as group devised theatre) (Hatton & Lovesy, 2009) is an ongoing collaborative process whereby groups work together to devise an original performance by combining drama forms and incorporating elements of drama and theatre. It can be conceptualised as a sustained exploration of ideas where participants move in and out of character, collaborating and critically reflecting on a fictional world of their own creation. Like the pieces of a jigsaw puzzle, each group contribution has its own genre, shape and colour. Finally, the group creations are drawn together into a meaningful whole to tell the story, in this case, of the MTeach program. Within these scenarios an advertisement, a rap, a news report and a role play became the individual scenes in a final performance. In each scene a different collaborative story was told.

Contemporaneously with the conceptualisation and organisation of the retreat, two of the three facilitators designed a study to investigate the effectiveness of this particular review



process in *fostering collaboration, strengthening staff morale and building a stronger program*. We now turn to a discussion of that study.

## Method

The research question that framed this study was: *In the view of facilitators and participants, to what extent did the application of Cooperrider et al.'s (2008) AI framework enable an effective review of an ITE program?* Qualitative data were collected in early 2012 during the three months following the retreat by way of a participant questionnaire and written reflections by the three facilitators.

### Participant Questionnaire

An online Qualtrics (Qualtrics Labs, 2011) questionnaire for retreat participants was designed by the two investigators and fully administered by a research assistant (RA). In compliance with the university's code of ethical conduct (University of Tasmania, 2010), the latter's involvement ensured that there was no perception of coercion on behalf of the investigators. A purposive sample (Cohen, Manion, & Morrison, 2011) was selected by the RA of those staff members who had (a) attended both days of the retreat and (b) expressed verbally or in writing their interest in participating in the study. Those in the sample were invited to complete the questionnaire that comprised seven open-ended questions framed around Whitney and Trosten-Bloom's (2003) six *AI freedoms*. As noted above, the freedoms were conceived of as the conditions through which AI liberates power and unleashes human potential. Table 1 includes the title and a brief definition of each one.

<b>AI Freedom</b>	<b>Brief definition</b>
1. Freedom to be known in relationship	All too often in work settings, people are related to as their role rather than as a human being. AI interrupts the cycle of depersonalization that masks people's sense of being and belonging.
2. Freedom to be heard	Being heard requires someone to listen with sincere curiosity, empathy, and compassion. AI makes a space in which people are free to be open to know and understand another person's story.
3. Freedom to dream in community	Visionary leadership means unleashing the dreams of people at all levels of the organisation. AI pens the opportunity for people to be free to dream and share their dreams, in dialogue with one another.
4. Freedom to choose to contribute	Freedom of choice liberates power, but it also leads to commitment and a hunger of learning. AI establishes an environment where people are free to choose to contribute.
5. Freedom to act with support	When people know that others care about their work and are anxious to cooperate, they feel safe to experiment, innovate, and learn. AI provides the context for people to be free to act with support.
6. Freedom to be positive	People often allow themselves to be swept away in collective currents of negativity. AI opens the way for people to be positive and proud of their working experiences.

**Table 1. Whitney and Trosten-Bloom's (2003) freedoms and their summary definitions.**

Participants were provided with an overview of the six freedoms and asked to comment on the extent to which they believed each was realised in the organisation, facilitation and their lived experience of the program review. A final question sought to elicit any additional comments or suggestions.

Fourteen completed questionnaires were received from the 26 staff members invited to participate, representing a 54% response rate. The questionnaire data were fully anonymised by the RA who substituted pseudonyms for names identifying self or other participants/facilitators and who allocated a code to each respondent (P1-14). Data were analysed subsequently by the two investigators, using Coffey and Atkinson's (1996) coding and categorical analysis techniques to derive key findings within each of the six freedoms.

One possible limitation of this element of the study design was that we could not ensure a representative response rate from those who believed the AI approach to have been effective, and those who did not. However, as indicated in the Findings below, participant responses voicing both views were provided.

### **Facilitator Reflections**

Facilitator reflections were captured in two stages. First, during team meetings in the conceptualisation and planning phases of the retreat, the leading researcher made written notes about points and counterpoints raised in the discussion. At the end of each meeting, these notes were "audited" (Cohen et al., 2011) by each team member for accuracy of representation. Secondly, a group meeting was held after the retreat and before the distribution of surveys during which a more structured written appraisal took place. Specifically, the leading researcher led the discussion around two topics: (1) the perceived level of effectiveness of each activity in meeting the aims of the retreat, and (2) the extent to which facilitators believed each of the AI freedoms had been realised. Audio-recorded and written notes taken during the discussion, once audited by the team, were then analysed by

the RA using similar coding and categorical techniques to those used for the questionnaire. Codes were applied to data extracts (F1-3).

## Findings

Findings were framed within the six AI freedoms as reported upon by the retreat facilitators and study participants. Table 2 presents a summary.

The six freedoms	Participants	Facilitators
Freedom to be known in a relationship	<ul style="list-style-type: none"> <li>• Participants appreciated the opportunity to interact socially with colleagues in ways that were “unique” and “personal.”</li> <li>• There were “rich, interpersonal opportunities” not afforded by the usual mode of technological interaction.</li> <li>• There was a perceived “power imbalance” at play, with “workplace roles carried over into workshop space.”</li> </ul>	<ul style="list-style-type: none"> <li>• Some activities were enabling of this freedom; others were less successful.</li> <li>• “Power relations” intruded to a greater extent than anticipated.</li> </ul>
Freedom to be heard	<ul style="list-style-type: none"> <li>• This was deemed to be the least “at play” of all the freedoms.</li> <li>• Participants identified obstacles, such as: insufficient time during structured activities to be “heard”; fear of speaking one’s own mind; intrusion of other “priorities” such as answering emails; and “conscious resisters.”</li> </ul>	<ul style="list-style-type: none"> <li>• Some collegial bonding occurred through listening to each other’s voices.</li> <li>• Insufficient time had been allocated to pursue some conversations.</li> </ul>
Freedom to dream in community	<ul style="list-style-type: none"> <li>• Although there was an effort to create “space” to dream, there wasn’t enough time to really engage in dreaming.</li> <li>• “I don’t know about dreams. I remember quite a bit of responding to instructions.”</li> <li>• The “community had not been developed enough for the “dreaming” dialogues to be successful.”</li> </ul>	<ul style="list-style-type: none"> <li>• Too many assumptions had been made about participants’ capacity and willingness to “unleash” their dreams.</li> <li>• Time allocated to some activities was too short.</li> </ul>
Freedom to choose to contribute	<ul style="list-style-type: none"> <li>• The structure of the retreat was such that several participants believed they <i>had</i> to contribute; they didn’t have the freedom <i>not</i> to contribute.</li> <li>• The power imbalance was such that, as one participant noted, because of “political implications,” “freedom to choose to contribute is not as simple or innocent a concept as it sounds.”</li> </ul>	<ul style="list-style-type: none"> <li>• The message of choosing not to contribute was clearly conveyed.</li> <li>• Participant involvement did not always equate with contribution.</li> </ul>
Freedom to act with support	<ul style="list-style-type: none"> <li>• Peer teaching activities were seen to be particularly positive, with participants generally supporting each other.</li> <li>• There was a perceived reluctance on behalf of some to “let go.”</li> <li>• People tended to support each other in their “home campus groups” and</li> </ul>	<ul style="list-style-type: none"> <li>• Inter-collegial support was evident at times throughout.</li> <li>• The provision of support was sometimes restricted to those already in collegial relationships.</li> <li>• Facilitators garnered more support from their campus colleagues than others.</li> </ul>

	not always outside of these groups.	
Freedom to be positive	<ul style="list-style-type: none"> <li>• Having the freedom to be positive was seen as a real strength of the retreat.</li> <li>• Discussions about contentious topics were “sandwiched between a celebration of our strengths and optimistic thinking towards the future.”</li> <li>• However, there were some who were perceived to remain “firmly entrenched in mindsets of negativity and pessimism.”</li> </ul>	<ul style="list-style-type: none"> <li>• The tone remained generally positive throughout despite some instances of negativity.</li> <li>• Ambivalence and seeming disengagement by several participants was unsettling for facilitators.</li> </ul>

**Table 2: Summary of Study Findings.**

These findings represent a response to our research question about the extent to which, in the view of facilitators and participants, the application of the AI framework enabled an effective review of an ITE program.

## Discussion

Our interpretation of the findings summarised above resulted in the two inter-related themes discussed below.

### Creating a Space

One of the complexities of creating healthy campus cultures among staff across a number of university sites is in enabling staff interaction across the geographical distances that separate them (Hong, 2010). With current technologies available to us, such as video-conferencing, Skype and the like, these distances have gone from being embedded in space (different locations) and time (to cover the distance to meet) to being mediated solely by space (Giddens, 2003). The opportunity to come together across that space was perceived to be a major strength of the retreat, particularly insofar as it enhanced the freedom to be known in relationship. These comments are indicative:

All activities and tasks allowed the freedom to mingle face to face. (P4)

Having colleagues from all three campuses was particularly important ... as cross-campus communication typically occurs via email and video-conference.

These technologies are helpful, but certainly do not provide the rich interpersonal opportunities afforded by a live-in retreat over two days. (P13)

There is evidence here that the retreat went some way in interrupting “the cycle of depersonalization” that is quite prevalent in work settings and that masks people’s sense of being and belonging” (Cooperrider et al., 2008, p. 27), with a number of participants reporting that they felt free to *be known in relationship*. Many study respondents reported that they felt relaxed with one another, that they were able to enjoy themselves, and that there was “an element of surprise” in some activities and in “doing things in a different way” than the norm. The mode of interaction was also perceived as constructive for future programming arrangements, as noted, for example by this respondent:

A feeling of the need to talk permeated. [We] needed to talk about the MTeach for consistency, to be on the same page. (P9)

For some, working together in the same space meant that they felt *free to be heard*, which suggests that, for these people, the retreat went at least some way in enabling the second AI

freedom. A number of activities, such as playbuilding, were seen as being particularly effective in this regard, as described by this participant:

I think it allowed us to listen to each other in different ways. We had to design something together that we'd never done before [and] this allowed us to see each other in a different light. Everyone had their own ideas and I think we did well to create something original out of them all. (P6)

The collaborative interaction to which this and other participants referred evinces the strength of educational drama as a means of generating meaningful and productive social engagement, as argued by Boal (1996, 2000), Courtney (1990), Neelands (1996) and others. In working together to devise an original performance, a number of participants were able to achieve what Hatton and Lovesy (2009) describe as movement in and out of character through engaged collaboration and critical reflection.

Others, however, perceived a degree of reluctance on the part of some to “let go” and to genuinely listen to each other, echoing Cooperrider et al.’s (2008, p. 27) argument that “being heard requires someone to listen with sincere curiosity, empathy, and compassion.” This perceived reluctance on some people’s behalf to genuinely engage with one another also seemed to limit the degree to which participants felt free *to dream, to contribute* and *to act with support*. A number of factors identified in the empirical data point to possible reasons for participant disengagement. We discuss these factors in the following section.

### **Building Community**

AI freedoms are intended to be experienced in community. As noted earlier, strong organisational communities are built around the establishment of relationships of trust, norms and values to achieve mutual goals (Dhillon, 2009). However, as has been identified by others (e.g., Ferris et al., 2009), the establishment of strong community is no easy task. Of particular note in this study were three key issues: defining *purpose*, overcoming *fear* and generating *trust*.

One of the objectives of the retreat facilitators was to evoke a sense of curiosity and surprise and, in the words of one facilitator, “to keep it positive, keep it moving, keep it fresh” (F2). Therefore, although we informed retreat invitees that the review process was to be framed by the AI approach and the reasons why, they had little idea of what sort of activities and expectations lay ahead of them. For some, such as this participant, this proved effective:

The retreat seemed to be a time of refreshment and inspiration without any “strings attached” ... rather it was an opportunity to connect with each other and with ideas which may influence the culture and “decisions” of our working environment. (P8)

However, the more dominant view, and unquestionably that of facilitators, was that participants felt confused by not knowing what was coming next, or why. “We may have tried too hard,” noted one facilitator (F2), and another commented that some participants might have chosen not to fully contribute because “we didn’t make our purpose clear enough or important enough for [them] to feel safe to experiment, innovate and learn” (F3). There was a lesson to be learned for us here.

The need to overcome fear and generate trust was most evident in the reported reluctance of some participants *to be known in relationship*, *to dream in community* and *to choose* to contribute. A number of reasons were provided for such apprehension, including workplace fatigue, not knowing the new environment and wanting to stay within one’s “comfort zone.” However, there were two overriding issues identified across both data sets. First, participants reported feeling disinclined, particularly in relation to some of the playbuilding activities, to move away from those whom they knew well and could trust. This comment is indicative:

Although activities were organised in such a way as to encourage people to connect with others in different roles, you tended to sit with the people you were already comfortable with. (P12)

Second, and more significantly for those involved, many felt unable/unprepared to move beyond *being known in relationship* as it related to their and others' roles. That is to say, professional identities remained intact:

You can take people away from the workplace, but you can't take their professional identities out of the interactions. (P5).

The most inhibiting factor in this regard was reported to be the involvement of key Faculty leaders:

"Figures of authority" in the room meant that workplace roles were carried over into the workshop space. (P14)

There was a sense throughout the retreat of a power imbalance and some deferential behavior was constantly at play. (F1)

This relational/role strain felt by participants affected not only their willingness to engage freely in activities but also, and perhaps more disconcertingly, their sense of *freedom not to contribute*: "there might be political implications if I were to take such a stance [so] freedom to choose is not as simple or innocent a concept as it sounds" (P14). In hindsight, we should perhaps have been less optimistic about the power of (our application of) the AI approach to positively influence the relational dynamics between our leaders and their staff.

This point notwithstanding, it should be noted that facilitators, especially, and participants, to a lesser degree, commented that the scoping, sequencing and timing of the retreat had implications for how successfully the freedoms were enacted:

The structure and timing of some activities meant that there was not always opportunity to pursue points of discussion that arose with great depth in the whole group setting. (P2)

Facilitators believed they had: included too many activities for the timeframe, thus inhibiting participant engagement; been overly ambitious in some of the types of activities given the target audience; and ill-considered the sequencing of activities on the first day. As summed up here:

Facilitators seemed to focus on the product rather than the process ... we wouldn't do this in our own teaching. (F2).

Resoundingly, though, respondents claimed that, for most people, the retreat represented an opportunity to be "critically reflective," "optimistic about the program" and "in sync" with Faculty colleagues. Albeit acknowledging some "currents of negativity," participants and facilitators felt that the *freedom to be positive* was embraced by all but the "conscious resisters [engendering] a celebration of our strengths and optimistic thinking towards the future" (P3).

## Conclusion

It is a federal legislative requirement of Australian higher education programs that they maintain relevant systematic quality appraisal and review processes (Tertiary Education Quality and Standards Agency, 2011). The program retreat contextualising this study represented one instance of how such processes were enacted in the first iteration of an Australian Master of Teaching program. The use of the Appreciative Inquiry approach to frame the retreat, however, signified quite a step away from the usual program review processes of the university.

In light of the study findings and of our interpretation of them, we conclude with five recommendations for facilitators considering AI as an approach to higher education organisational analysis and learning:

1. Scope, sequence and timing are paramount.
2. Beware of making assumptions.
3. Power imbalances change everything for some.
4. Barriers are resilient.
5. Working as facilitators with peers in the AI environment requires a high level of confidence.

Finally, those of us who facilitated the retreat acknowledged that, in an effort to make the shift to a forward-looking and positive approach to the appraisal of the MTeach, we were perhaps imbued ourselves with an overly optimistic sense of how we should conceptualise and implement the review. In retrospect, we might have been wise to pay greater heed to AI critics such as Williams (2004, p. 359) to avoid our somewhat “relentless focus on the positive [that] exudes more than a whiff of Pollyanna.” We would certainly use the AI approach again, but with the cautions associated with the understandings that we have since developed and that we have just discussed.

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## Appendix A

### Retreat schedule (abbreviated)

<b>Event</b>	<b>Time</b>
<b><i>Day 1</i></b>	
Morning tea & music	10.30-11.00 am
Expectation activity	11.00-11.20 am
Introduction	11.20-11.35 am
“Goose story”	11.35-11.45 am
“Discovery” activity (a) (MTeach strengths)	11.45 am-12.30 pm
“Discovery” activity (b) (barriers)	12.30-1.00 pm
Lunch	1.00-1.45 pm
Introduction to afternoon session (the lived experience)	1.45-1.55 pm
“Design” activity (a) (Inclusive Education tute activity)	1.55-2.35 pm
Energiser	2.35-2.50 pm
“Design” activity (b) (Planning for Positive Behaviour tute activity)	2.50-3.30 pm
Coffee break	3.30-3.45 pm
Communication activity (How to Twitter)	3.45-4.30 pm
Retreat dinner	6.30 pm
<b><i>Day 2</i></b>	
Coffee	8.15-8.45 am
“Design” activity (c) (Secondary music tute activity)	8.45-9.30 am
“Dream” activity (Lifting your research profile)	9.30-10.30 am
Feedback (Twitter)	10.30-10.45 am
Morning tea	10.45-11.00 am
“Design” activity (d) (Maths tute activity with whiteboards)	11.00-11.40 am
“Design/Destiny” activity (Overcoming barriers)	11.40 am-12.30 pm
Retreat review	12.30-12.45 pm
Close	12.45 -1.00 pm
Lunch & discussion	1.00 pm