

ACTION INQUIRY - REFLECTION



I ask for what I desire as we begin this topic



I pray that my entire being become open to God's grace



I imagine these texts being addressed to me, and note my response

Grace: Pending

Pending

ACTION INQUIRY- EXERCISE

INCREASING OUR EFFECTIVENESS THROUGH LEARNING AND ADAPTATION

Part 1: Connecting to experience

Think of a situation that has been on your mind/ preoccupying you this week or a situation/relationship that you experience that you would like to see transformed

- What's the context?
- Who is involved?
- What's my role?
- How am I defining the problem?
- How do I feel about it?
- What would success look like?

Part 2: Inquiring about adaptations and learning

- As you take the time to assess the gap between your intentions/aspirations and your current reality/performance, what adaptations can you think of to close this gap?

Part 3: Reflecting with others

- Debrief the situation and share your thoughts with another person. Take turns listening to each other's "case."
- Instead of offering advice, take some time to list a series of questions to help each other gain insights on the challenge and how to approach it.
- Share your questions and collect insights.
- At the end of the discussion, go through the questions you have suggested. Where did your focus primarily go? Where did you put your attention? (on behaviors, on outcomes, on feelings,...)
- Which questions were the hardest to answer?
- Which one generated the most of insights/learning?
- How useful did you find this process of inquiry?

ADDITIONAL EXERCISES

1. Refer to the Section: Triple Loop Awareness. Use the questions provided to gain insights on the cases you shared above.

ACTION INQUIRY - INPUT

INTRODUCTION

Another particularly effective means of supporting developmental growth is the vertical learning practice known as Action Inquiry. The term action inquiry was first used by Bill Torbert as a development of action science as practiced by Chris Argyris. This reflective practice encourages individuals to be continually questioning of their purposes, strategies, and behavior while adjusting these on the basis of feedback about their impact in the world.

MAIN IDEAS

Action Inquiry: A transformative practice

- Action refers to doing something (e.g. physically, verbally) and inquiry refers to reflecting and questioning (e.g. in your own mind, or in conversation with others). As a method, Action Inquiry is a moment-to-moment way of living whereby we attune ourselves through inquiry to acting in an increasingly timely, wise, and effective fashion for the overall development of ourselves as leaders, our colleagues, friends, and family, and the wider world.
- The Ignatian notion of contemplation in action, and the Buddhist notion of mindfulness both refer to this way of being reflective in the midst of what we're doing.
- Practicing action inquiry increases the rate of learning and effectiveness and helps us (as individuals, teams, and organizations) become more capable of:
 - listening into the present moment and detecting the dangers and opportunities it carries,
 - performing in effective, transformational, and sustainable ways by fostering personal integrity, interpersonal mutuality, and organizational sustainability.
- Bill Torbert insists that action inquiry “is not a process that can be followed in an imitative, mechanical way, learning a few ideas and imagining that parroting them back to others occasionally means one is doing action inquiry. Rather, action inquiry is a way of learning anew, in the aliveness of each moment, how best to act now”.
- This challenging yet transformative practice demands high levels of curiosity, a willingness to experiment, a vulnerability to inquiry and learning from experience and feedback and most importantly high degrees of awareness to the present situation and in different territories of experience.

Practicing Action Inquiry across various territories of experience:

Action inquiry is a method of learning that involves the subject as well as the object, the self as well as the system or organization investigated. The practice of Action Inquiry can be conducted in three categories and across various territories of awareness:

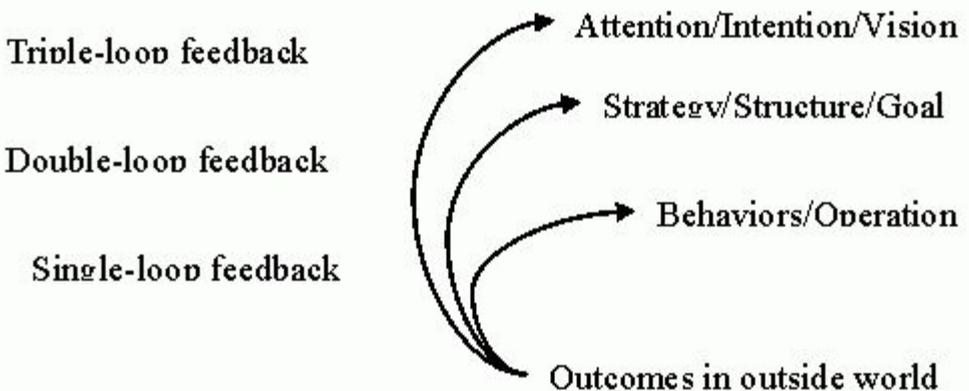
- At the first person (the intrapersonal experience) - the “I”
- At the second person (the interpersonal space of speaking and listening) - the “We”
- At the third person of organizing (the objective experience) - the “It”

To practice working from these three perspectives (I, the We, and It), the Action Inquiry model makes distinctions between various ‘territories’ of an individual experience. Think of them as different areas of focus. These territories are always present, though we are not always conscious of the connection between them, and the importance of alignment from one to the next. The four territories of action inquiry are:

1. Context (including intention, purpose, vision, attention and awareness)
2. Frames (including strategies, structures, plans, goals, and tactics)
3. Actions (including behaviours, skills and performance)
4. Results (including outcomes, assessments, and consequences)

Action Inquiry advocates a goal of becoming fully and simultaneously aware of all these perspectives, at all times, and across all time-frames. This way of always learning and flexibly adapting, based on the outcomes of your action and inquiry is defined as **triple-loop learning**. For examples and a practical application of Action Inquiry and Triple Loop Learning, refer to the Handout (Practicing Action Inquiry across various territories of experience).

Single-, double, and triple-loop feedback and Four territories of experiences



The fruits and virtues of this practice

By making distinctions between various territories of experience and developing our attention and awareness, practicing action inquiry can enhance our moment-to-moment experience and development as a leader. This practice also helps us review our relationships with ourselves, others, and the things of the world. According to Bill Torbert, action inquiry is about discovering the interaction between personal passion (at the first person), interpersonal compassion (at the second person) and dispassionate objectivity (at the third person). These qualities or virtues can be developed simultaneously:

- **Integrity and passion** can be developed through fostering self-awareness, developing presence, and acting in alignment with one's personal values and intentions.
- **Mutuality and compassion** can be developed by creating trust and mutual communication, developing a shared vision, acting in collaboration within the team and optimizing the diversity of team members' strengths.
- **Dispassionate objectivity and sustainability** can be developed by taking a very broad perspective and seeking to influence culture towards maximising happiness within ecological constraints, and depends on having the "right relationship" with all created things.

IGNATIAN NOTE

The First Principle and Foundation of the Spiritual Exercises provides a window into Ignatius' understanding of life's goal or purpose, and speaks to the importance of having the right relationship between ourselves, others, God, and all created things. Based on this right relationship, everything exists in harmony and justice. When we have misaligned relationships, addictions, or attachments, these form discord and lead to alienation and injustice. The Spiritual Exercises and the practice of the Examen help us become aware of these disordered attachments and grow in freedom.

Exploring some distinctions between action inquiry and contemplation in action:

As highlighted in this section, action inquiry is a very useful practice that emphasizes:

- our capacity to be **aware** of myself, of what we are doing, of others, of many other perspectives... i.e our capacity to put distance and
- our capacity to reflect on our **interventions** the underlying intentions and assumptions, the impact,...

Without a faith-based component, action-inquiry emphasizes in some ways a bilateral relationship of subject-object. There is the person practicing action inquiry and there is the object that he is inquiring about - whether this object is a person, an action, an outcome, a value or principle, an intention.... Through action inquiry we practice and may reach a kind of pedagogy for searching (going deeper, for understanding our way of behaviors, etc...). While this practice carries a lot of insights, it may help to share some distinctions with contemplation in action.

In contemplation in action, we are affirming something more:

- We are affirming that we are capable of being aware and reflecting AND,
- that in this reality that we are able to see and take distance from, this reality where everything is there with all the possible perspectives one can take, we are affirming **as a faith conviction** (and possibly as a result of a personal experience) that there are signs (or manifestations) of the presence of God.

We are affirming that in our life, in our relationships, in our work, in our actions, there are signs of the presence of God, and that we are capable and willing to look for these signs.

Ignatius' openness to look for and recognize signs of God's gratuitous and generous presence transformed his relationship to things and people and created a space for gratitude, humility and reverence.

Contemplation in action appears at the very end of Ignatius Exercises. It seems like it is not a starting point but more like a disposition that arises at the end of a spiritual process. Ignatius suggests the Spiritual Exercises to help us learn the basics, the grammar. As we become more familiar with our spiritual motions and in-tune with our internal spiritual world, this disposition to finding signs of God's presence in our life (in the midst of action) becomes natural, something we have internalized.

This goes beyond simply inquiring about our interventions, challenges, relationships in respect of a given virtuous value (such as respect, or mutuality, love or other moral principles). At its core, contemplation in action is the expression of a relationship. It is intimately linked to the spiritual life and needs the concrete and specific relationship (dialogue) with God. If we don't keep the spiritual track/path of the conversation, we may easily get to a moralistic approach, simply judging what is good or bad.

Like any reflective practice, action-inquiry can be very helpful for Ignatian leaders, provided that the methodology does not occupie all the space, locking us in a position where all the analysis is kept between us and the object), and distracting us from opening up to life-giving encounter.

EXPECTED LEARNINGS AND OUTCOMES

1. Introducing action inquiry as a vertical learning practice
2. Distinguishing the different territories of experience and developing attention and awareness in each
3. Inviting participants to practice action inquiry to perform in effective and sustainable way

ACTION INQUIRY - HANDOUT

PRACTICING ACTION INQUIRY ACROSS VARIOUS TERRITORIES OF EXPERIENCE

David McCallum SJ

Making distinctions between the various territories of experience, developing your attention and awareness, and practicing Action Inquiry can enhance your moment-to-moment experience and development as a leader.

The Four Territories of Experience: First, Second, and Third Person

Action Inquiry in the First Person:

When we consider our personal reality, notice four distinct categories or “territories of experience.”

- The first territory of experience is my **INTENTION** or **VISION** (*the aspirations, goals and vision we have for the future, our sense of purpose, the reason behind our action (the why)*)
- Next, we might note how we develop **PLANS** that define *what* manner of action we might follow in order to attain our intention. This the second territory of experience, or *strategy*.
- Once we have our strategy, the next territory of experience is that of *how* we **ACT**, our *tactical* action or behavior.
- Finally, the fourth territory of experience is that of **ASSESSING** whether or not our actions are delivering the results envisioned in the first territory.

The work of the first person space, that of my own self-management and leadership, is that of attending to the flow from **vision, planning, acting**, and **assessing** so that I am achieving the results I intended.

Action Inquiry at the Second Person:

In the second person space of our interpersonal relationships, communication is a primary leadership activity, so that speaking and listening are the focus of the four territories of experience. In our communication:

- the first territory consists of providing context which **FRAMES** the reason for our communication
- We follow our framing with the point we are attempting to **ADVOCATE** or make (second territory)
- Communicating our point may require sharing evidence or reasoning, or **ILLUSTRATING** by examples (third territory)
- and finally, concluding our communication by **INQUIRING** whether others have understood what we said, or have a different perspective (fourth territory).

Action Inquiry at the Third Person:

Finally, when we consider the third person space of our organizations, we move from the interpersonal or intrapersonal sense of the collective to that of the objective things, such as resources, policies, procedures, and ways of organizing them. Here, the four territories are named in the straightforward action terms of 1) **VISIONING**, 2) **STRATEGIZING**, 3) **OPERATING**, 4) **ASSESSING**.

Summary

In summary, at the first person, attention is paid to four territories (Attending/Intending, Feeling/Thinking, Sensing/Behaving, Perceiving/Effecting). At the second person, the four territories are Framing, Advocating, Illustrating, and Inquiring. At the third person of organizing, the territories are Visioning, Strategizing, Operating, and Assessing. Action Inquiry at the second and third person will be covered in more details in Module 2 and 3.

The four aspects of Action Inquiry across the three spaces				
		First Person space (I) Personal Awareness	Second Person space (We) Social Awareness	Third Person space (It) Organizing
I.	CONTEXT	Intending/Attending	Framing	Visioning
II.	FRAMES	Thinking/Feeling	Advocating	Strategizing
III.	ACTIONS	Acting/Embodying	Illustrating	Performing
IV.	RESULTS	Effecting/Sensing	Inquiring	Assessing

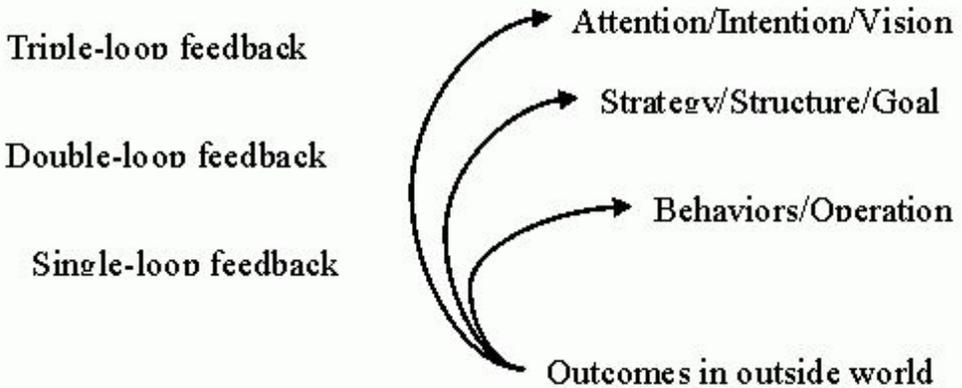
An Example of the Territories of Action Practiced at the First Person

Imagine you are working to reduce your carbon footprint, or the impact that you're making on the environment between your use of resources and the amount of pollution or trash that you are generating. Your current approach/strategy for reducing this carbon footprint might be by making less single-occupant car trips and reducing home energy consumption.

At any point in this process your attention might be focused on:

1. The measurement of the outcome/effect of your actions, and assessing the positive consequences of emission reductions (RESULTS)
2. Your new behaviours e.g. your increased skill at recruiting people to share rides or your management of home energy usage relative to your desired performance (ACTIONS AND BEHAVIORS)
3. The framing of those actions e.g. Your strategy for how your individual actions reduce your feelings of guilt, positively influence others, and contribute to national targets for carbon reduction (FRAMES)
4. The context e.g. Your new awareness of global issues, the changing economics that make energy reduction more attractive to you, and your emerging desire to leave a positive legacy for your children (CONTEXT-INTENT-PURPOSE).

Single-, double, and triple-loop feedback and Four territories of experiences



As a leader, it is not enough to inquire about one's own behaviors (actions) and seek to learn new ones, or focus only on how challenges are framed and seek to develop new strategies. One needs to be consciously aware of the wider context for those strategies (the underlying intentions and purpose), and be attentive to how that affects plans, performance and outcomes in the real world.

These various levels ('loops') show the different extents to which you can be aware of, act on, and inquire into the different aspects of your experience. The "feedback loop" provides data as to whether you are on target to fulfill your goal or not.

Ignatian Note: Ignatius of Loyola suggested that Jesuits should live with "one foot raised;" in other words, that if we seek to be effective, we must be ready to pivot in order to achieve our goals. Not only does leadership require awareness and flexibility, which are clearly needed in order for effectiveness and adaptation, but leaders also need the interior freedom to allow their assumptions to be questioned and altered, to adjust their perspective, expand their hearts to be more inclusive, and even to be transformed as they are in the process of leading others through change.

Simple Practices to Support Action Inquiry

The territories of attention, and the three loops of learning are each a critical area of development for a leader. But increasing your awareness of them, your ability to switch between them in-the-moment, is something that requires practice.

What practices can you think of to increase your capacity for consciously shifting your attention, become more aware of your frames of reference and intentions and of the consequences of your actions for others?

Your own ideas and practices may be complemented by some simple practices recommended by Torbert and his colleagues. Try doing each activity for a week or two to support your own practice of Action Inquiry:

1. Set your watch to chime every hour. When it beeps, notice what your attention has been on e.g. Your body, behaviour, past or future interactions with others.
2. Increase consciousness of your energy, mood, and attention by noticing what happens as you transition from one activity to another e.g. bed to the kitchen, work to home. Track your mood and energy levels following meetings you take part in, or people you interact with.
3. Keep a regular journal that explores these different territories of your own experience, your attention, and what you learn.
4. Another helpful practice is articulating your professional goals and values and constantly aligning your behaviors and strategies to them. At times, we are acting with clear intention toward goals important to us. Other times, we unconsciously drift away from our original purpose and values. In your journal, consider a formal project using the four categories as a way of distinguishing the elements from conception through operationalization, actualization and assessment. To which extent do your actions and behavior match your intentions?
5. Seek peer feedback (on your communication style for example). Your colleagues may shed lights on territories of experience you were not focusing on.
6. Practice meditation and silent contemplation.
7. Practice being explicit in your conversations about your *Framing* (your intent behind this conversation), *Advocating* (what your theory of change is, or what strategy you recommending), *Illustrating* (What you think the implications of this conversation are for action - verbal or physical) and *Inquiring* (asking questions of others and listening for the impact of your conversation).

Note: Practicing action inquiry at the second person will be covered in Module 2 (specifically in the *Four Parts of Speech*), but as an illustration to this 4th example, and going back to the carbon footprint scenario, imagine you are talking to your spouse about your new commitment, specifically about their behavior and compare these two conversations:

- a) “You’re setting a bad example for the kids by driving to work everyday and leaving the lights on all night”.
- b) “I am more and more aware of how our everyday actions influence the climate, and affect our kids. I want to reduce our emissions, mainly through sharing car trips wherever possible, and doing things at home like turning lights off when not needed. Is that something you are interested in too?”

You can play out in your own mind how the rest of the conversation would unfold. Chances are that the latter dialogue would be one that proceeded in a more open, and transformative way that facilitated mutual understanding, and was more likely to result in collaborative action.

ACTION INQUIRY - RESOURCES

GENERAL LEADERSHIP RESOURCES

Title	Author	Publisher	Year	Link
Action Inquiry: Interweaving Multiple Qualities of Attention for Timely Action	William R. Torbert and Steven S. Taylor	The SAGE Handbook of Action Research		Link
Action Inquiry: The Secret of Timely and Transforming Leadership	Bill Torbert, Cook-Greuter, S.R., et al.	Berrett-Koehler Publishers	2004	Link
Introduction- The Promise and the Power of Action Inquiry and Chapter (excerpt from Action Inquiry)	Bill Torbert and Associates			Link
Inquiry in Action for Leadership in Turbulent Times: Exploring the Connections Between Transformative Learning and Adaptive Leadership	Aliki Nicolaides and David C. McCallum	Journal of Transformative Education, Vol. 11(4)	2013	Link
Handout - Practicing Action Inquiry across various territories of experience	David McCallum SJ			

IGNATIAN RESOURCES

Title	Author	Publisher	Year	Link
Seeking God in all things: Ignatian Spirituality as Action Research	David Coghlan	The Way	2004	Link

QUOTES

- Action inquiry is “...a moment to moment way of living whereby we attune ourselves through inquiry to acting in an increasingly timely and wise fashion for the development of the families, teams and organizations in which we participate” - Torbert et al.
- “A method that can correct error in the midst of ongoing action is qualitatively more useful to us, more beneficial for others, and more powerful in a scientific sense than methods that alternate action and inquiry.” Torbert et al.