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BUILDING A PROFESSIONAL COMMUNITY OF PRACTICE THROUGH COLLABORATIVE INQUIRY

Christopher E. Stevens
Southeastern University - Lakeland

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Christopher E. Stevens

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This is to certify that the dissertation prepared by:

Christopher E. Stevens

titled

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Has been approved by his committee as satisfactory in completion of the dissertation requirement for the degree of Doctor of Philosophy

Approved By:

Joshua Henson, Ph.D., Chair

Jannetides College of Business, Communication, and Leadership

Bethany Peters, Ph.D., Committee Member

Jannetides College of Business, Communication, and Leadership

Jolene Erlacher, Ph.D., Committee Member

Jannetides College of Business, Communication, and Leadership

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Abstract

Little if any research has been conducted to determine the dynamics of and meaning derived by a group of professionals using collaborative inquiry (CI) to create a values and behaviors (VB) statement in the early stages of forming a community of practice (CoP). This case study involved individual interviews and other observational techniques to determine meanings derived from the inquiry and identify the value individuals and the group as a community may have gained from the CI. The research questions for this study addressed how using CI to establish the VB statement affected the development of the CoP, the meaning individual participants derived from the experience, the effect the experience had on individual participants, and the contribution the shared experience made to the formation of the group's corporate culture. The literature review addressed CI as an arm of action research and the primary vehicle for the phenomenon investigated in the project, individual and corporate values and their relationship with associated behaviors as information being generated by the CI, and the history, structure, and functions of the CoP that served as the laboratory for this research. The research strategy for this project was a pragmatic hermeneutic approach. Because the CI and hermeneutical inquiry cycles are similar, the outcome of the CI informed the outcome of this research project. The findings indicated the use of CI to create a VB statement resulted in clarity of expectations within the community, common terminology for expected behaviors, greater self-awareness, and cultural curiosity that resulted in a spirit of cultural comity and communal intimacy.

Keywords: communal intimacy, communities of practice, collaborative inquiry, cultural comity, values and behaviors.

Dedication

This work is dedicated to the learners of today and the future. While I had various personal reasons to pursue a doctorate, I am where I am now because the Lord laid this journey on my heart. I cannot articulate a reason for me to have come this far other than the firm conviction that this is what my Lord wanted me to do. I did not initially know the "why" of His purpose, but I believe I have come to see (just a bit) what He desires for me at this point in life: that my shoulders should serve as a place for young men and women to begin their leadership journeys or as a resting stop for the journey they have already begun. I have read many dissertations that dedicate the work to God. I believe deep in my heart that my service to learners will result in accomplishing what He has chosen for me in this season of my life, so I suppose that means that, in the spirit of stewardship, this work is indeed dedicated to my Lord, Jesus. By educating and empowering those who seek to serve Him, whatever glory may result will be carried to rest at His feet by those He has given me to serve. I pray we all embrace a spirit of Servant Leadership and will be good stewards of what He has entrusted to our care. I am unable to comprehend much less express how good Jesus has been to me. May His Name forever be exalted.

"Hallelujah! For the Lord God Almighty reigns!"

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Last but not least, Dr. Mike Anson, *Requiescat in Pace.*

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Chapter 1 – Introduction

Professional communities have existed since before the Roman Empire, waxing or waning depending on governmental, societal, industrial, and cultural environments (Durkheim, 1893). The term community of practice (CoP) came into use in the late 20th century, originating in academic circles and spreading to other disciplines as its utility became evident (Wenger et al., 2002). Fundamentally, CoPs are composed of people with common concerns, problems, or interests about tasks or topics, sharing knowledge and expertise among themselves in social practice as a productive learning process (Farnsworth et al., 2016).

Although educators lean toward the CoP model, using group introspection and conversation to share answers and resources for support, particularly in times of change (Burt et al., 2018) and resource challenges (Freeman et al., 2022), CoPs are not limited to school administrators and faculty or the United States. In Alberta, Canada, a communal study is being conducted in several districts using collaborative inquiry models to enhance educational practices and build leadership capabilities in CoPs in both student and faculty populations (P. Adams & Townsend, 2014), and in the medical field, CoPs have been used for virtual problem-solving across cultural lines and national borders (Institute for Healthcare Improvement, 2019). Various niche CoPs (many virtual) exist, ranging from college students collaborating in different countries (Springman, 2010) to Designshop practitioners gathering to share and solve technical design problems (Brook, 2019). The World Bank devotes a portion of its website to various articles written to support building and maintaining CoPs in a diversity of disciplines (Communities Reinvented, 2021a).

A feature of CoPs is their emphasis on shared stewardship of knowledge rather than the traditional hierarchical organization (Wenger, 2011). The leadership dynamics of CoP tend toward flexibility, especially when members are gathered from various organizations or institutions. Shared leadership is based on the interactions between group members rather than a centralized

authority or influence (Sousa & Van Dierendonck, 2016), allowing joint decision-making and information exchange to drive collective behavior (Sousa & Van Dierendonck, 2016).

The nature of the CoP lends itself to collaborative inquiry (CI), thus, fostering communities of inquiry within CoPs (V. Friedman, 2006). The linking of the two as a formal academic practice was introduced at the turn of the 21st century (Wenger-Trayner, 1999). The conceptual roots of CI can be traced to John Dewey's (1910) *How We Think*, wherein he argued that independent thinking is limited and needs direction beyond simple instruction to achieve growth and maturity. He proposed that "language is the tool of thinking" (p. 170) and that, by extension, directed conversation—what he termed "consecutive discourse" (p. 185), could be both a learning and social experience. Thus, active observation results in the discovery of a playful yet profound approach to academic conversation, which provides the intellectual ideal for mature thinking and problem-solving. In defining CoPs, Wenger-Trayner (1999), in his early work, introduced the term "negotiation of meaning" (p. 52), indicating simultaneous processes of exploring an issue to define and make sense of it while discovering more significant reasons for the existence of the CoP associated with the problem. Around the same time, researchers of organizational values pursued the same theme with different verbiage: defining the organization by defining its values as the meanings that drive its existence (Hall, 2006). The CoP rests on a foundation of communal agreed-upon purpose and meaning, a definition applicable to organizational values. When the two approaches are harmonized, exploring meaning to establish values indicates the need to inform a communal conversation to define purpose—Dewey's (1910) "consecutive discourse" (p. 185).

Interrelated human systems, whether schools, businesses, teams, or communities, are directly affected by their organizational values (Gopinath et al., 2018). Those values are most influential when created and voiced by the entire group (Ali et al., 2020). Academic organizations have the advantage of institutional memory and an established collaborative culture, but there is little research

reflecting the intentional, collaborative development of values in other communities. The process by which an individual joins a community can be eased by their decision to embrace the established norms and values of the group as an expression of a desire to fit in (Holmes, 2015). Still, the challenge may be intensified when the context is that of a newly formed community that has yet to define itself fully. Business startups and professional organizations should address the issue of culture formation, particularly when founded by individuals not intimately acquainted with one another. Such a group must somehow work out their new communal norms and values from the ground up (Perkmann & Spicer, 2014), especially when expected to self-organize and share leadership duties.

To date, the research on CI by professional groups has been limited to the product of the research or business leadership skills developed by participants (Cardinal et al., 2021; Smith et al., 2019). No research has been published determining the dynamics of and meaning derived by a group of professionals using CI to create a values and behaviors (VB) statement in the early stages of forming a CoP. This study encompassed an exploration of the benefits and pitfalls experienced by a group of civic leaders while using CI to articulate their preferred behaviors in creating a values statement to serve a CoP that functioned according to consensus and shared leadership theory.

Statement of the Problem

Research into building business models using CI for CoPs in small groups and cross-organizational CoPs is needed (J. Schwarz & Legner, 2020). More research is necessary on the group cooperation and community-building aspects of CoPs intending to achieve the group synergy essential for collective creative work (Shaheen et al., 2021). The nature of CI suggests viewing every inquiry as a unique event, even when similar lines of inquiry are being pursued (Dyer & Löytönen, 2012), so that each CI presents an opportunity to add to collective knowledge. Although individual studies tend toward strong internal validity, they also tend toward weak external validity (Jimenez-Buedo & Miller, 2010). Thus, further research with community practitioners will enhance the general

understanding of the co-creation process (Chung, 2019). Inquiry into the value and mechanics of using CI as a tool for CoP building is still in its infancy, and the body of knowledge needs to be supplemented accordingly.

Variations of CI for CoPs such as collaborative self-studies and other group works have been done with populations of limited size and narrow professional focus within educational CoPs, indicating there is room for further investigation in the context of business and civic circles (Wilson-Mah et al., 2022). The work of Smith et al. (2019) on facilitating an emergent curriculum to develop leadership practices with owner-managers of small businesses indicated that CI could be used beyond the academic world and applied in a CoP atmosphere of retail and commercial work. Smith et al. conducted their research with a small group in a single location and suggested an opportunity for further inquiry within business and professional populations. No studies of CI exist to establish values and behaviors and their effect on ad hoc groups formed for service to communities. However, in research on small groups administering humanitarian aid abroad, Comeau (2019) examined how group style—the behaviors expected by the culture and purpose of the group—influenced the group's effectiveness and the satisfaction of individuals within the group and called for research into whether that phenomenon would transfer to other small groups, particularly those that are doing civically oriented work in their hometowns.

The Leadership Stockton program's cohort leadership structure is shared leadership and consensus within the cohort. A Chamber of Commerce administrator functions as an event coordinator and communications hub, but the cohort is expected to lead itself from within. Shared leadership is determined by lateral influence among members of a like-minded group distributing leadership roles, influence, and power throughout the group (Zhu et al., 2018). In practice, CI allows participants to function as collegial stakeholders, designers, and researchers, sharing perspectives and knowledge throughout the inquiry, indicating that shared leadership applies to CI (Riel, 2019). The practice of shared leadership encourages participation and stimulates creativity across the group's membership (Ali et al., 2020) and was proposed to be both a right and a responsibility among educators

when it was introduced as a framework theory (Lambert, 2002). Differences exist between shared leadership as practiced in commercial and noncommercial environments and a need for context-specific research in the field, particularly in service organizations (Sweeney et al., 2019). Educators linked shared leadership to CI for students and teachers around the turn of the 21st century as an assumption (Lambert, 2002; Lummis, 2001). Research into the collective leadership dynamics of action research is limited (Piggot-Irvine et al., 2021), but research into CI and shared leadership working together is lacking.

Warren et al. (2016) encouraged community-engaged scholarship as a viable discovery tool. They noted the need for academicians to move beyond viewing community members as research subjects and empower them to participate actively in the research process. An inquiry is needed into the professional's journey through CoPs because of the little exploration or theorization of the experience (Reed et al., 2017). In taking a hermeneutic approach to the inquiry, the CI-facilitating researcher becomes a co-inquirer, functioning as both an observer and a participant (Lave & Wenger, 1991; Nelson et al., 2010), gaining deeper insights into the process and obtaining a richer end product of the inquiry (Kakabadse et al., 2007). In conclusion, a case study of a researcher-facilitated CI that emphasizes participation by an ad hoc group of professionals in pursuit of forming a CoP for civic education and community service will add to the existing body of knowledge and further inform the practice of establishing small groups as CoPs rather than mere collections of individuals.

Purpose of the Research

The purpose of this case study was to examine the experiences of professionals participating in a 10-month civic leadership education CoP as they used CI to establish a VB statement. Research is needed on building cross-organizational CoPs (J. Schwarz & Legner, 2020) and how to use CI for CoPs in community building for small groups (Shaheen et al., 2021). To meet that need, I explored the culture-building aspects of the initial efforts to form a CoP through the group's creation of a VB statement. The process of a CoP articulating desired

behaviors and then grouping those behaviors under values descriptors has not been researched. Therefore, I facilitated a CI exercise as a communal effort to achieve those aims. The cohort worked together through conversation to discover and articulate an understanding of intragroup communication and relationships, in this instance, via defining shared values and associated behaviors (V. J. Friedman et al., 2020). This research focused on exploring how the shared process of developing values-based behavioral expectations created personal and collective meaning for the CoP in light of the group's self-directed creation of a unique culture and group style (see Liang et al., 2021).

Research Questions

This study was an exploration of how a CI to establish a VB statement by a group of professionals participating in a 10-month leadership fellowship affected the establishment of a CoP and the personal and communal meaning found in the process. The research questions that guided this study are as follows:

RQ1: How do participants think the experience of using CI to establish the VB statement affected the development of the cohort as a CoP?

RQ2: What meaning did the individual participants derive from using CI to develop the VB statement?

RQ3: How did using CI to develop the VB statement influence the individual participant's experience?

RQ4: What, if any, value did the shared experience of belonging to a CoP and using CI to develop the VB statement contribute to the formation of the group's corporate culture?

Significance of the Research

Although CI has been used in several educational and commercial arenas, it is yet to be fully explored in application to inner-life issues such as values, social progress, self-knowledge, and reconciliation (Shani & Coghlan, 2021). Despite being recognized in the educational community, CI is underutilized as an educational change agent and holds the potential to bring about positive changes in professional communities (Schnellert, 2014). It has been viewed as a type of

crowdsourcing of organizational knowledge within large populations, but the potential of relatively small professional CoPs to explore, reflect upon, and articulate knowledge is yet to be thoroughly investigated (Oeberst et al., 2014).

In early subject literature, present-day CoPs were described as information-sharing entities ("Communities of Practice," 2003), with social and business applications joining education as environments where those with common thinking, purpose, or talents find fellowship (Farnsworth et al., 2016). There is little research into CoPs' use of CI to build the community. Still, there is a call for further investigation of CoPs' social learning in the components of group roles, activities, leadership, and training (Chung, 2019), all of which would be addressed in a CoP's VB statement.

Research on the use of CI for organizational improvement is abundant (Shani & Coghlan, 2021). There have been efforts to use action inquiry to generate vision and mission statements at the graduate school-level field (Jayne, 2018). However, there are no inquiries into using CI to establish an organizational VB statement, showing a gap in the body of research.

Consensus-driven shared leadership has been observed as profitable for small groups (Balagna et al., 2020). Despite CoPs being rooted in the concepts of shared identity, knowledge, language, understanding, practice, cognitive potential, norms, values, and information (Nicolini et al., 2022), in the literature, shared leadership is mentioned as a feature of the CoP, incidental to the community rather than as a defining principle. In organizations, CoPs should be cultivated rather than managed and function best when led from within (Wenger & Snyder, 2000) as with shared leadership. In contrast, CI is grounded in dialogue entered into as a cooperative venture based on shared power and humble inquiry (Shani & Coghlan, 2021), an apt, if incomplete, description of shared leadership (Stojanovic-Aleksic, 2016). Such a grounding indicates that the dynamic of shared leadership should be considered in this inquiry. Shared leadership is not a centerpiece of the inquiry, as it is mentioned only tangentially in the research literature regarding CI in CoPs. However, shared leadership provides a context for this research project in that consensus for making major decisions historically has been featured in the

orientation session for the Leadership Stockton CoP and is emphasized throughout the program. Exercises for consensus building are included in early group sessions and all members of the cohort are expected to share leadership functions and duties.

Conceptual Framework

This study involved an exploration of how the use of CI by a group of professionals to create a VB statement affected the formation of a CoP and the resultant group style, culture, and practice of shared leadership. The community's founding and early development were framed using Tuckman and Jensen's (1977) work on small group development, primarily the steps of forming, storming, and norming. I examined both process and product, detailing the personal interactions of the CI in the creation of the CoP's VB statement, how those interactions affected the group's culture and group style, and ultimately the group's perception of the worth of the VB statement after it had been created.

Collaborative Inquiry

CI is a conversational or dialogical approach to exploring a subject, solving a problem, or articulating a concept, generating new models of thinking and challenging existing paradigms (Bonebright, 2010). It is dialectic and informed by a realist philosophy that employs multiple perspectives to establish collective knowledge or reach a consensus (Hay & Samra-Fredericks, 2019). It is grounded in group dialogue and should be facilitated by an engaged researcher with an attitude of humble inquiry (Shani & Coghlan, 2021).

Values and Behaviors

Values are the labels given to broad life goals, providing motivation and behavioral guidelines for individuals, organizations, communities, and cultures (Buchanan & Bardi, 2015). A state of values congruence (where published organizational values match the values of the individuals who make up the organization) fosters trust and sustainability in both individuals and organizations (Gopinath et al., 2018). Behaviors are the visible demonstration of an individual's values (Laird-Magee et al., 2015). When personal and group behaviors reflect the

collective desire for personal achievement, group harmony, and agreed-upon values, the result will be overall well-being (Buchanan & Bardi, 2015).

Community of Practice

A CoP is a group of people with common concerns, problems, or interests about tasks or topics who share intellectual resources and expertise as a productive learning process within their community (Farnsworth et al., 2016). Group culture and style are the behaviors the community expects based on its mores and purpose (Comeau, 2019). The mores are manifest as characteristics such as knowledge sharing, a sense of belonging in the group, and member interaction (Li et al., 2009). The community defines the purpose (or domain) to be pursued in the context of maintaining the community health and structure, and consistent communal structure and practice are necessary for the community to thrive (Wenger et al., 2002).

Shared Leadership

Shared leadership is lateral leadership between peers in lieu of hierarchical or authoritarian-based leadership (Pearce et al., 2007). The sharing of leadership has been shown to support team cohesiveness and the ability to focus on their shared purposes (Klasmeier & Rowold, 2022). In a low power distance environment such as a cohort of equals, shared leadership has a positive relationship with individual creativity and service to the organization (Liang et al., 2021). The significance of shared leadership as part of the conceptual framework is found in the mandated shared leadership structure of this particular CoP and the nature of CI, which, in this instance, is a process that is driven by the interpretations within the group facilitated by an external third party rather than a central leadership figure.

Methodology

This study was a case study with the research approach following the hermeneutic philosophy of Heidegger et al. (2008), where human perceptions influence the understanding of new experiences, reshaping the existing perceptions in an ongoing cycle. In this approach, the researcher can then aggregate

individuals' reflections to uncover commonalities in the experience, treating the inquiry process as a spiral by revisiting previous knowledge and viewing it through the lens of new information as it is acquired (Peoples, 2021). Because I both facilitated the CI and conducted the case study, I functioned as a co-inquirer, serving as an observer and a participant in the CI (although external to the CoP). Doing so helped me gain deeper insights into the process and yielded a richer end product of the inquiry, as Kakabadse et al. (2007) highlighted, while maintaining a keen sense of responsibility to be aware of researcher bias. I practiced some of the principles of reflexive thematic analysis, in particular, purposing not only to maintain awareness of my subjectivity but determining to interrogate it as a means of gaining insight into my role as the researcher and teller of the story (see Braun & Clarke, 2022).

Participants

Participants in Leadership Stockton, a 10-month educational service fellowship administered by the Stockton California Chamber of Commerce, were volunteer research subjects. Stockton was recently named the most diverse city in the United States (US News & World Report, 2020). The Chamber is careful to recruit participants from all communities nested within the greater community in a deliberate effort to have each year's cohort reflect the local population. The participants are people of ambition who come together from local businesses, not-for-profit, and civil service organizations to learn about various leadership aspects of the city and county government, culture, and community (Leadership Stockton, n.d.). Each annual cohort participates in a CI exercise to agree on behaviors they wish to practice or avoid. The behaviors then serve as values definitions to produce a statement that is used as a foundational organization document for the cohort, known as that cohort's communal VB statement.

Data Collection

Because enough data must be gathered to ensure a full understanding of the case, the researcher must achieve data saturation, where all available data sources have been gathered (Ness, 2015). To ensure saturation for this study, I used data collected from each session and cycle of interviews to inform the prompts for

subsequent sessions or cycles, as Creswell and Poth (2018) outlined. I used video footage of the formal CI, field notes, the workshop notes generated by participants, and personal recollections from observing the cohort's CI, social times, and two-day retreat to support saturation and achieve data source triangulation (see Carter et al., 2014; Saldana et al., 2011). I gathered data in the manners appropriate for the event venues to create a case study database following Yin (2009). As a direct participant in the CI, I viewed the primary CI event video to refresh my memory and supplement my field notes. The materials generated during the exercise informed a chronology of the bricolage. I kept a reflective diary of my observations of the group as they participated in the CI and their interactions during their retreat. The diary helped me articulate my observations, memorialize interchanges between group members, and monitor my subjectivity. I collected and stored images of the early drafts produced by the small groups that informed the collective group's work toward producing the final VB statement. Also collected were comments made by the cohort members in conversations that were not formal interviews, some made directly to me, and others made among cohort members in my presence.

I conducted a series of interviews following the CI exercise and then repeated them approximately a month later, after the group attended a retreat to further build the CoP by deciding on a collective civic project. During the interviews, I collected data from cohort participants to understand their perceptions of the shared experience and its impact on both individual members and the CoP as a whole. The interviews occurred via Zoom with recording and transcribing all conversations using Otter for the coding process. I also shared the interview recordings with the participants and invited them to review the transcripts for accuracy. Although specific research questions guided the interviews, they were semistructured, allowing the participants to explore and express their thoughts openly, as Saldaña and Omasta (2022) explained. My primary goal was to gather detailed statements that could be transformed into clear descriptions of their experiences and observations. Following a structured approach, I coded and distilled these descriptions into common themes. As an observer during the cohort retreat 1 month after the CI, I memorialized my observations in my diary regarding

group social and project work dynamics and intragroup communications (see Mulhall, 2003). I conducted follow-up interviews following the retreat to pursue the greater depth of participant trust and rich data gathering, which are provided by prolonged engagement (Morse, 2015).

Data Analysis

Data coding was by hand. I coded each event separately in chronological order. Because later coding sessions sometimes uncovered questions or subjects not explored in previous sessions and in consideration of the phenomenological research process, I revisited earlier sessions to provide consistency over time and in light of the various events coded, as Elliott (2018) advised. Although progressing through the coding process sometimes reveals the need for different or more coding passes, the results of the three passes indicated data saturation. The first pass was in vivo coding, where I reviewed interview transcripts to the participants' actual phrases and words, a necessary step to infer the essence of the participants' expressions (Manning, 2017; Saldaña & Omasta, 2022). The second pass was process coding, where I looked for words and phrases that indicated actions, developmental processes, or psychological activities, typically using -ing words for description (Onwuegbuzie et al., 2016; Saldaña & Omasta, 2022). The final pass was values coding, which involved consideration of the subject's worldview, belief systems, and attitudes and articulated them to generate insight (Saldaña, 2021; Saldaña & Mallette, 2016).

Ethical Considerations

In qualitative research, ethics should be viewed as a characteristic of the researcher/subject relationship rather than merely a checklist or code (Roth & von Unger, 2018). Such a perspective allows research subjects freedom to voice any concerns while holding the researcher to professional, moral, and personal ethical standards.

To ensure compliance with ethical guidelines, participant recruitment occurred on a strictly voluntary basis and with the endorsement of the chamber of commerce that hosts and administrates the fellowship. Written permission from the chamber to conduct the study is on file with the Southeastern University

Institutional Review Board (IRB). All participants signed a standard informed consent document and received a copy that included the assurance of confidentiality and protection of their rights as participants. The Southeastern University IRB committee granted consent on June 14, 2023. All research occurred in compliance with Southeastern University's published research standards.

Scope and Limitations

The study involved approximately 30 professionals enrolled in a 10-month local leadership development cohort. Participants recruitment occurred at the time of their enrollment in the fellowship in the sponsoring agency, a local chamber of commerce, committed to supporting the research effort. The size of the group and the program's history ensured a diverse range of perspectives and experiences, which helped provide a nuanced understanding of the experience and contextual observations, adding depth and breadth to the findings.

As the researcher, I embraced my duty to ensure that I recognized and addressed any personal bias to maintain rigor in data collection, analysis, and interpretation. The study was limited to a single community, and although it provided an in-depth understanding of the group's experience, the findings cannot be classified as generalizable. The program participants committed to participating in the fellowship with both time and tuition, and participation in the study was voluntary and not compensated. All program participants voluntarily signed consent forms, but three withdrew from the study after completing the CI. None of the personal data of those who withdrew was included in the study. All personal identities were purged from the data.

Definition of Terms

Bricolage. A term from the art world that refers to the use of existing resources to find workable solutions and is based on the artist using whatever materials are in the studio to create a new unified work (Gray et al., 2011). Academics use the term to refer to agreeing upon names for things as a tool for communal understanding, using knowledge that is available for definitions (Campbell, 2019). Sociologists pose the idea of bricolage as the melding of various

traditions with personal preferences or other individual innovations (Altglas, 2014).

Collective Bricolage. It is the use of what emerges from the daily work of those participating in a project to inform the creative process (Corbett-Etchevers & Parmentier-Cajaiba, 2022).

Comity. This term refers to jurisdictions respecting differing laws and practices of other governments as long as such consideration does not compromise the granting government's sovereignty (Yntema, 1966).

Communal Intimacy. It is a social state of attachment beyond that of individual-to-individual relationships, indicating an inclusive social atmosphere defined by the strength of numerous weak connections (Törnqvist, 2021).

Corporate Culture. It is the tacit order of an organization or community, the principles and values that inform members' behavior (Groysberg et al., 2018; Guiso et al., 2015).

Instantiation. This term refers to a particular manifestation or instance of a theoretical concept as a concrete exemplar; an example of the physical application of a theory (Hanel et al., 2017).

Organizational Bricolage. It refers to emerging organizations acquiring shape through drawing on multiple organizational forms (Perkmann & Spicer, 2014).

Social Comity. This term refers to the application of the principle of deference and mutual respect among individuals as a social norm (Loughmiller-Cardinal & Cardinal, 2023).

Team. A team is an interdependent group of individuals who share skills, knowledge, resources, and information in a combined effort to achieve a common goal (L. L. Thompson, 2008).

Summary

Little if any research has been conducted to determine the dynamics of and meaning derived by a group of professionals using CI to create a VB statement in the early stages of forming a CoP. This case study involved individual interviews and other observational techniques to determine meanings derived from the inquiry

and identify the value individuals and the group as a community may have gained from the CI.

Chapter 2 – Literature Review

The context of this dissertation is research into the use of CI for CoPs. CI is the seeking of truth and solving of problems via a directed group discourse (Bray et al., 2000), with all the risks and uncertainties associated with humanity's diversity (Shani & Coghlan, 2021) while addressing hard questions with no easy answers. Such adaptive challenges result in growth. They are problems that cannot be solved with existing resources but demand a shift from the present application of assets into tactics and strategies yet unexplored (Heifetz et al., 2009). Through collaboration, CoPs can address adaptive challenges and generate new knowledge and resources rather than recycle old solutions (Senge, 1990).

This case study contributes to research into the building of business models using CI for cross-organizational CoPs (J. Schwarz & Legner, 2020). More research into the group cooperation and community-building aspects of CoPs is necessary to achieve the type of synergy essential for collective creative work (Shaheen et al., 2021). As of this writing, only one narrowly focused published narrative existed regarding using a CI to establish values and behaviors and their effect on ad hoc groups formed for service to communities (Cardinal et al., 2021).

I facilitated a CI to create a VB statement for a newly formed CoP participating in a civic organization-sponsored 10-month fellowship. Following the CI, I recorded events, behaviors and comments, and conducted interviews with the participants to articulate their experiences to explore the culture-building aspects of the initial efforts to form a CoP through the group's creation of a VB statement. As of this writing, the process of a CoP articulating desired behaviors and then grouping those behaviors under values descriptors had not been researched as a phenomenon. The cohort worked together through conversation to discover and articulate an understanding of intragroup communication and relationship, in this instance, via defining shared values and associated behaviors (V. J. Friedman et al., 2020).

This literature review addresses the three major aspects of the research: (a) CI as an arm of action research, (b) individual and corporate values and their

relationship with associated behaviors, and (c) the history, structure, and functions of the CoP.

Action Research and Collaborative Inquiry

Foundations

Early in the twentieth century, Frederick W. Taylor introduced the idea of considering the human factor as an industrial application, contending not only that the abilities and behaviors of the men who ran the machines be considered a force in industrial productivity (Derksen, 2014), but also that the worker be viewed as a "passive factor in production and an appendage to a machine" (Patmore, 2016, p. 32), with little to no consideration of the social aspects of work. It was not until the 1920s that researchers uncovered a concept that may seem apparent to modern-day readers: workers at the Hawthorne Works of the General Electric Company who engaged with one another and enjoyed social activity in the workplace were more productive, had greater job satisfaction, and kept a more organized workplace than those directed to concentrate exclusively on production (Gillespie, 1993). In the late 1930s and 1940s, Lewin, in his work overseeing the Harwood Studies, introduced the idea of workplace democracy and reinforced the duty of management to respond to the workers' interests (Burnes, 2007; Desmond & Wilson, 2019). Interest in the study of social activity among workgroups waned during World War II as industrial productivity for the war effort overtook quality of work issues and work groups were manifested primarily as small task-oriented teams with little formal attention to team building outside of shared experiences (Sundstrom et al., 2000).

The Tavistock Institute was launched in 1946 as a subsidiary of the Tavistock Clinic, an outpatient mental health center, with the vision of integrating research, teaching, and consulting (Tavistock Institute of Human Relations, n.d.). Tavistock was an early adopter of action research (AR), bringing together practitioners from a range of disciplines including medicine, mental health, sociology, and anthropology to address specific practical problems. Around that same time, Frederick Herzberg highlighted the concepts of satisfiers and

dissatisfiers; satisfiers being motivators that are internal in nature (what the worker accomplishes) and long-lasting, whereas dissatisfiers (hygiene factors) are primarily environmental, thus, external in nature and temporary (Gawel, 1996). Herzberg (1968) concluded that job enrichment rests in discovering workers' strengths and allowing them to exercise those strengths and embrace challenges and the growth that follows. In his 1970's *Pedagogy of the Oppressed*, Freire (2000) furthered the articulation of the power of conversation as a learning instrument introduced by Dewey at the turn of the century (Dewey, 1910). Freire contended that, to make a difference, dialogue had to move beyond a mere exchange of ideas or polemic arguments to the realm of transformation, being recognized as an act of creation that instigates change rather than domination and practiced in an atmosphere of love and commitment to the well-being of self and others. In the 1980s, business research and practices turned their focus to teams and teamwork, with the social aspect of the team recognized as an important factor in team-building (Parker, 2008).

The concept of the learning organization was introduced in the late 1980s and with it, a set of guidelines for engagement (Senge, 1990). The guidelines were presented as tools of organizational learning but ended up serving as a practical framework and lexicon for CI:

- Personal mastery – making room in self and in the organization for individuals to expand personal capacity towards personal goals and purposes;
- Mental Models – continuous review and revision of people's thought pictures of the world with consideration of how they affect their decisions and actions;
- Shared Vision – cultivating inspiration through common goals and a shared mental image of common values, where the group is going, and how it hopes to get there;
- *Team Learning* – creating synergy to fulfill visions through group communication and collective thinking; and

- *Systems Thinking* – developing a language to understand and describe the relationships and dynamics that shape systems behavior (Senge, 1990).

Other aspects of organizational learning related to CI are participatory action research (focusing on problem-solving rather than discovery), reflective practice (focusing on introspection and self-examination), and appreciative inquiry (focusing on what is working well and improving it rather than seeking out problems and solutions; Burt et al., 2018).

Early CI practices were instituted as a response to a collision of systems. Educational practitioners and researchers found that common goals were not enough to guarantee communal problem-solving. They had to find a research structure that considered the research paradigms and communication modes of all participants while pursuing concrete objectives in an egalitarian atmosphere (Oakes et al., 1986). Shared leadership provides just such an atmosphere. In place of hierarchical or authoritarian-based leadership, shared leadership is lateral leadership amongst peers (Pearce et al., 2007). Researchers have demonstrated that the sharing of leadership promotes team cohesion and the capacity for the team to concentrate on its common goals (Klasmeier & Rowold, 2022) and supports both voice and leadership cohesion between stakeholders (Geib & Boenigk, 2022). Shared leadership has a favorable association with individual innovation and contribution to the organization in a low power distance environment such as a cohort of equals (Liang et al., 2021).

Learning and Education

The concepts of experimental and experiential learning emerged contemporaneous with Freire. Experimental learning depends upon the immediate local context as the setting for intervention experiments, which are experiments not only conducted to test hypotheses but are also expected to effect some type of change in the situation (Argyris & Schon, 1989). It is accepted as the theoretical basis for AR and participatory action research. Lewin (1946) saw the value of AR for minority communities that needed to gather to define problems and formulate actionable solutions despite sometimes profound differences. Lewin has been referred to as “the originator of action research” (Adelman, 1993, p. 7).

Building upon Dewey, Lewin, and Freire, Kolb (1984) proposed a four-stage cycle of experiential learning: concrete firsthand experience, reflection and observation, abstract conceptualization (sensemaking), active experimentation by applying the insights gained in the process, and repetition of the cycle until the subject is fully explored. Experiential learning provides the theoretical context for CI (Bray et al., 2000), but it is not the only theory that provides context for collaboration.

Mezirow (2003) presented learning via three perspectives: transformative, instrumental, and communicative. Transformative learning is based on the instructor teaching the student self-reflection to develop personal insights, skills, and dispositions necessary for critical reflection and self-reflection, and emphasizing applying those skills in dialectical discourse. Instrumental learning involves assessing truth claims through classical critical thinking. Communicative learning depends upon the developed skill of understanding those with whom one communicates, their worldview, assumptions, and qualifications. All three perspectives are necessary for CI.

Emergence of Collaborative Inquiry

AR was introduced to the educational community in the 1950s but was looked down upon in early days as an amateur approach to research (P. Adams & Townsend, 2014). Reason (1999) sought to narrow the focus from AR as an ill-defined term while broadening the outcome of good research to include creative actions addressing matters important to both researchers and research participants. He introduced the term "co-operative inquiry" (later, collaborative inquiry; p. 208), as a term for focused action research, which means working with others who share concerns to make sense of life, understand the world, and develop creative ways of looking at things to make change and improve performance. Although AR's purpose is to improve or modify systems in response to systemic problems, the purpose of CI is for group members to modify themselves and agree upon a compelling question that the group can address by surveying data from their experiences and life observations, and thus develop their individual capacities, both professional and personal (Kasl & Yorks, 2002).

Definition and Characteristics

CI is a group-focused conversational or dialogical method of subject discovery, problem-solving, and concept articulation that creates new models of thought and challenges preexisting paradigms (Bonebright, 2010). To develop common knowledge or reach a consensus, it is dialectical and guided by a pragmatic realist philosophy (Hay & Samra-Fredericks, 2019). Because it is based upon group discourse, CI should be managed by a participative researcher using a spirit of modest inquiry to pursue collegial dialogue to probe more deeply the subject matter than is possible with a superficial conversation (Nelson et al., 2010; Shani & Coghlan, 2021). Whenever possible, collaborative leadership should be exercised. A marriage of pragmatism and vision, collaborative leadership is based on defining what is and articulating what can be and how to get there (Frydman et al., 2000). Collaborative leadership relies on participants in the leadership relationship to make a conscious decision to consider the human aspect of organizational behavior while moving the conversation forward.

Key Features and Principles

The primary themes of CI are the experience of establishing a collaborative culture with respect to and expectation of both professional and personal growth, based upon shared leadership, inclusion, and trust (Tallman, 2019). In systems terms, CI is defined as a dialogic emergent research process that, in a social interaction atmosphere, includes those within and without the system who share the purpose of improving or developing the system and creating new understanding within it (Shani & Coghlan, 2021). Key elements include interaction between insiders and outside advisors, the objective of generating practical knowledge of the change necessary for improvement while acknowledging pertinent organizational problems, an egalitarian atmosphere of cooperation that values expertise over hierarchy, and conducting the inquiry as a present-tense evolving practice. The central objective is to create new meanings while exploring existing meanings, a process that demands structure for success.

Stages of the Collaborative Inquiry Process

CI is cyclical in nature, where the CoP comes together to ask questions, develop theories and action steps, document and analyze their experiences, and assess the results as a group, repeating the process as necessary (Donohoo, 2013). Reason (1999) proposed four phases of the cycle: (a) agree on the subject/issues for application; (b) as individuals, explore and record the outcomes of application in everyday life; (c) seek full immersion (saturation) in the experience; and (d) reassemble to consider their original questions and reflect on one another's experiences. The phases provide an atmosphere for participants to engage in a deeper conversation, where it will be important to focus on subjects rather than personalities.

Collaborative Inquiry and Empowerment in Conflict

Collegial inquiry moves beyond polite, genial conversation and into questions of substance where CI participants are empowered to ask each other hard questions because of an agreed-upon pursuit of solutions without accusations (Nelson et al., 2010). Successful subject-based conflict is based upon evidence-based dialogue and a view of conflict as an intellectual challenge rather than an emotional event. A sense of interdependence, trust, goal congruence, and responsiveness rather than reaction provides for a cooperative context (Uline et al., 2003).

Follett (Follett & Graham, 1995) contended that conflict was neither good nor bad and one should avoid considering it with an ethical pre-judgment, rather, look at it as the discovery of difference and judge it accordingly. She proposed three outcomes of dealing with conflict: (a) domination, victory for one side, which guarantees a loser; (b) compromise, where something is accepted, but no one really wants it that way; and (c) integration, the finding of a solution where both domination and compromise have a satisfactory place in the solution. Integration involves moving beyond the obvious either/or choice to a place of invention, where new options are discovered or created.

To foster equity within a CI, a research group established three axioms: (a) group members' lived experiences carry as much importance as traditional data; (b)

when the group creates or discovers knowledge, it belongs to all members of the group; and (c) group members must commit to equality in contribution and commitment, a quality referred to as "whole person engagement" (Group for Collaborative Inquiry & thINQ, 1994, pp. 58-59). To cultivate such a climate, the community must adopt an atmosphere of humble inquiry by developing the ability to draw one another into conversations of discovery, asking questions with the desire to find answers rather than build arguments, and building relationships on curiosity and a desire to discover what others have to offer to the conversation as an exercise in humility (Schein, 2013).

The Humanity/Humility Factor

Collaboration takes place among humans: individuals with unique life experiences and perspectives may feel the pressure to agree with the group rather than actively contend for their point of view (Carron et al., 2003). To fully explore what the community has to offer, CI must delay the language of certainty until after exploring the concepts uncovered by the language of inquiry; a community established to learn will succeed only if it embraces an attitude of doubt to pursue knowledge with a spirit of "passionate humility" (Yanow, 2009, p. 579). In *Humble Inquiry: The Gentle Art of Asking Instead of Telling*, Schein (2013) defended "the fine art of drawing someone out, of asking questions to which you do not know the answer, of building a relationship based on curiosity and interest in the other person" (p. 2). The act of fostering cross-disciplinary collaboration is based upon humble inquiry principles such as preparing to learn about an entirely new field of expertise, seeking out new experiences firsthand, confessing ignorance of new terminology, learning how others express themselves differently than you, and confessing when things are not working well (Knapp et al., 2015). Embracing alternate ways of knowing with a humble attitude not only nourishes communal research, but it also establishes and confirms connectedness as a tool for ongoing dialogue with others (Hay & Samra-Fredericks, 2019), an essential aspect of CI in CoPs.

Collaborative Inquiry in Communities of Practice

Freire's (2000) contention that effective dialogue must move into the realm of transformation and creation that instigates change rather than domination, practiced in an atmosphere of love and commitment to the well-being of self and others can inspire the formation of a CoP. Community creators can use Lunenburg's (2010) professional learning community template, which is as follows: bring stakeholders together, create a mission statement, clarify the vision, develop value statements, and establish concrete goals. The CoP can flourish as a community of inquiry if both facilitators and community members commit to a set of common values, procedures, and terminology as co-researchers to undertake a critical examination of their practice (V. Friedman, 2006). Being a researcher is different from filling the role of both researcher and subject of the research. The latter involvement enables the participant to engage as a "whole person" rather than strictly an observer or the one being observed (Phillips et al., 2022). The pitfalls faced by the researcher/facilitator include impatience with the process, the tendency to apply heuristic thinking rather than an open exploration of the subject, and succumbing to the temptation to act quickly rather than let the process unfold at its own pace (Brown et al., 2021).

Facilitators should let community members express themselves as individuals and encourage the CoP to embrace the variety of personalities, backgrounds, experiences, and philosophies present in the CI (Hurd & Stein, 2004). Homogeneity supports easy information processing, which can lead to a fluency heuristic and a failure to consider all options. A group with a wide variety of person, profession, culture, and experience types will be forced to slow down and consider various aspects of situations. The result is a greater comprehensive effort to define issues and consider solutions. (Rock et al., 2016). As community members become more comfortable with one another and trust develops, the concept of conversational meandering through the subject outside of formal CI sessions should be encouraged as a method of casual inquiry that has been shown to lead to insights into complicated topics, resulting in actionable solutions (V. J. Friedman et al., 2020).

Characteristics of Successful Collaborative Inquiries

Schools have instituted an ongoing CI staff development project across Alberta, Canada (P. Adams & Townsend, 2014). The research results produced six characteristics of CI projects beneficial for growth. They include (a) the CI must be sustained rather than episodic, (b) responsibility must be shared from within rather than demanded from outside, (c) site-embedded CIs are more effective than off-site exercises, (d) CIs need to be custom built rather than standardized across the system, (e) the CI must be inquiry based rather than instructional, and (d) the CI has to be a shared experience with no one left out or isolated.

Summary and Conclusions

CI is rooted in AR, a communal conversational learning process that gained popularity in the mid-20th century. CI grew out of a more precise definition of organizational learning that provided both a lexicon and behavioral guidelines for engagement, including an egalitarian approach to the process that became viewed as experiential learning. In addition to experiential learning, CI took on aspects of transformative learning, instrumental learning, and communicative learning, adding academic rigor to the process. The primary themes include a collaborative culture, whole-person growth, shared leadership, trust, and the human aspects of organizational behavior. The central objective is the creation of new meaning while exploring existing meanings. When disagreements arise, the emphasis is on the clash of ideas rather than of personalities with the objective of integration as the outcome. CI works best when approached with a spirit of humble inquiry, delaying the language of certainty until after the subject has been fully explored by letting the process unfold at its own pace. A successful CI is marked by sustained effort, shared responsibility, a structure appropriate to the inquiry, and inclusion.

Values and Behaviors

Buchanan and Bardi (2015) offered a broad definition for values: the names given to overarching life goals that serve as motivation and behavioral norms for individuals, organizations, communities, and cultures. Values express broad life goals, provide motivation, and supply guiding principles for daily life. A person's

behavior is the outward manifestation of their values (Laird-Magee et al., 2015) and when organizational values are clearly identified and articulated as aspirational goals, individual behavior is likely to follow suit (Tyler, 2011). Overall well-being will arise when individual and group behaviors are consistent with the shared desire for individual success, group harmony, and shared values (Buchanan & Bardi, 2015).

Theoretical Perspectives

The Schwartz theory of basic values (S. H. Schwartz, 2012) includes 10 basic personal values that are shared across cultures. The theory is based upon the need for individuals and cultures to cognitively recognize, articulate, and respond to three universal human requirements: (a) basic biological needs, (b) social interactions, and (c) the welfare and survival needs of groups (Schwartz & Bilsky, 1990). The values are presented as measurements of the state of individual human preferences and interests and are arranged in a circular structure with antagonistic values opposite each other and complementary values arranged side by side, representing a motivational continuum (see Figure 1). The arrangement of antagonistic and complementary natures of specific values conforms to the formal definition of values and value systems as offered by Rokeach (1973):

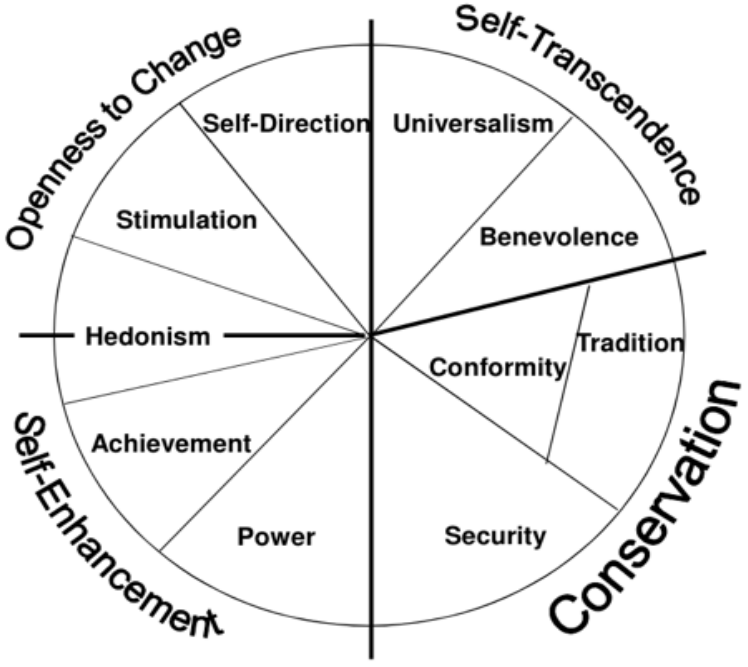
> A value is an enduring belief that a specific mode of conduct or end-state of existence is personally or socially acceptable to an opposite or converse mode of conduct or end-state of existence. A value system is an enduring organization of beliefs concerning preferable modes of conduct or end-states of existence along a continuum of relative importance. (p. 5)

Schwartz's model has been used for cross-cultural research in more than 70 countries with over 200 sample sets examined, establishing strong support across various languages and cultures (Roccas & Sagiv, 2017). Values may refer to instrumental (behavior) or terminal (objective) goal types. Instrumental values are measured based on personal behaviors, either successes or failures in morality or competence. Terminal values are concerned with either the individual's end state or the societal results of the individual's behaviors, whether they be contributions to society's well-being or some type of social misconduct (Rokeach, 1973; Schwartz

& Bilsky, 1990). Values are passed from generation to generation by one or more of a culture's social organizations as a conscious or unconscious effort to foster shared beliefs and behaviors that contribute to communal loyalty, social cohesion, and the building of trust in the community (Mohammad & Stedham, 2021; Rokeach, 1973). Although the broad theory of values manifests in individuals, organizations, and cultures, this study focused on the system of organizational values, beginning with how individuals relate to values through behaviors and then following that relationship through the organizational values system as discussed in the next section.

Figure 1

Schwartz's Theory of Basic Values



Note. Adapted from "An Overview of the Schwartz Theory of Basic Values" by S. H. Schwartz, 2012, *Online Readings in Psychology and Culture*, *2*(1). https://doi.org/10.9707/2307-0919.1116. Used with permission of the author.

The Relation Between Values and Behaviors

Values are commonly recognized as constant individual preferences in the minds of individuals waiting to be articulated to others to accomplish a goal, a motivation, or a state of being (Bilsky & Schwartz, 1994). People also use values to

judge whether other people, their behaviors, or events are desirable and worthy of pursuit or rejection. Once that judgment is made, values encourage behavior patterns that, if successful, support the values in a self-reinforcing loop. For a value to inspire an attitude or behavior, it has to be recognized as essential and a decision has to be made to move forward—the more critical the value, the more frequently it will be activated into behavior (Schwartz, 2017). The only meaning a behavior has is the description of the meaning—the value—an individual gives to it (Cieciuch, 2017). Values influence behavior by encouraging behaviors concurrent with the value and discouraging behaviors that do not support the goals associated with the value (Schwartz et al., 2017). Long-term rules of coexistence among people are based upon the hierarchy of values best suited for the survival of the group and, by extension, its culture. Activation of a value is found in the individual recognizing its importance and deciding to pursue it. At the same time, inhibition is the resistance of taking an action in recognition that it conflicts with a recognized worthy value (Cieciuch, 2017). Individuals are likely to assume what values they hold by examining their voluntary actions, but only in everyday life without the constraining influence of random external factors (Fischer, 2017). Most values hierarchies work unnoticed in the coherent self, installed by prosocial constructs and the feeling of reward experienced when "right" values choices are made. A comparison of neuroscience studies of values with behavioral research revealed that the relationship between values and behaviors is initiated by the behaviors (Fischer, 2017), indicating the need to discuss how behaviors can function as the primary manifestation of values via instantiation as discussed in the next section.

Value Instantiations

In facing a dilemma, the natural first step in problem-solving is to use a heuristic—search one's memory to find a similar problem and recall what the solution was for that problem and then determine whether that solution can apply to the current situation (Kahneman, 2011). Instantiations, which are concrete exemplars of the physical application of a theory, serve as values heuristics (Hanel et al., 2017). A vague value such as equality becomes a more powerful motivator when the thinker is able to picture realistic examples of inequalities mentally and

envision the behaviors likely to effect change (Maio, 2010). When values lack proper cognitive elaboration, they are less likely to result in appropriate corresponding behaviors; the lack of articulation hobbles the exercise of the value. Instantiations also provide support for arguments on behalf of a value and resistance to arguments attacking the value (Maio, 2010). Behaviors are values instantiations: concrete demonstrations of cultural and personal values (Suhariadi, 2016).

Instantiation can be applied in the bricolage process of forming a new community in three ways: anchoring, augmenting, and differentiating (Perkmann & Spicer, 2014). The taken-for-granted values-infused organizational core is established as an anchor. Ancillary behaviors of member values are shared to address practical issues and augment the pursuit of anchors. Values and behaviors that are unique to the group give it distinctive features that set it apart from other organizations. These applications are all part of the process discussed in the following sections. Because values will predict decisions made and actions taken above and beyond formal organizational roles (R. B. Adams et al., 2011), the principle of instantiation supports the conclusion that behaviors, being the demonstration of values, can be reverse engineered to identify their associated values.

Organizational Values and Culture

"The concept of integrity, understood as a set of values contextualized within particular administrative settings, is helpful for articulating the link between values and administrative practice" (Molina, 2015, p. 371). Different aspects of organizational values have been given various labels and definitions in the literature, but a synthesis of organizational value types includes aspirational (how things ought to be), attributed (what members see in the organization), shared (personal values that are congruent with organizational values), and core (mission oriented values and espoused/published values), with some researchers combining various categories (Bourne & Jenkins, 2013; Denison et al., 2014; Vveinhardt et al., 2016). Many organizations have adopted the practice of using values to promote and enforce an alignment of behaviors and normative controls (Bourne & Jenkins,

2013) and manage corporate culture (Ouchi & Wilkins, 1985), whereas others have used them as landmarks for cultural orientation and benchmarks of progress with various levels of success (Cady et al., 2011). Corporate culture manifests itself by what is accepted or rejected and encouraged or discouraged within a group and provides durable influence on the group's attitudes and behaviors (Groysberg et al., 2018).

Espoused/aspirational/core values of an organization are typically published as collective values statements and serve several purposes, including (a) to represent the organization's intent to operate in a particular manner, (b) as a measurement for organizational activity and performance, and (c) to foster particular behaviors by organizational members (Bourne et al., 2019). Logic indicates that an organization's espoused values should match its enacted values, influencing organizational culture toward a state referred to as values congruence (Gopinath et al., 2018). The term values congruence also refers to the matching of organizational values with members' personal values as discussed in the next section.

Values Congruence

The question of whose values among those declared by the organization, formed by management, or personal values accepted by all members provide the foundation for the organization is salient (Vveinhardt et al., 2016). The organization's values must be established and both organizational and member behavior must be in alignment to achieve congruence. For this to occur, value definitions must be clearly articulated, with those in authority fostering a commitment to congruence as both a process and an organizational status (James, 2014). Behavioral integrity is achieved when stated intentions and actions are congruent (Gopinath et al., 2018). Value integrity can be defined as the set of values contextualized within administrative practices (Molina, 2015). When the practice of organizational values is congruent with the values of the people who make up the company, trust and sustainability are promoted for both the organization and the individual (Gopinath et al., 2018). Values congruence also contributes to several properties associated with high-performing organizations

such as empowered/engaged members, alignment of individual behaviors with values, and a clear sense of purpose (Denison et al., 2014). People are attracted to an organization with a culture that is congruent with their stated values and match the members' personal values (T. J. Porter, 2013). While considering the congruence dynamic and bearing in mind the importance of member involvement, initiative, and participation in the organization's development (Vveinhardt et al., 2016), the discussion moves to the various dynamics of values development in a CoP.

Values for a New Community of Practice

By its nature, the creation of a new community comes with a degree of uncertainty for all involved. Uncertainty-identity theory addresses how identification with a group can lessen an individual's anxiety by establishing belonging in a group with which they identify (Hogg, 2012). When a group of individuals comes together to form a community, establishing an agreed-upon set of community values will assist them in belonging to and forming the community identity (Branson, 2008). This process can be accomplished by conducting a structured values clarification exercise that is designed to include all participants and encourage them to commit to supporting the established values statement, building congruence of personal and organizational values.

To ensure an inclusive organizational culture, the intention of the values clarification exercise has to include acknowledgment of the following: (a) the uniqueness of the individual, their dignity, rights, and ability for individual growth; (b) a general respect for human rights; (c) care for and service to other community members; and (d) an emphasis toward common good over particular interests (Melé, 2003). Such a humanizing atmosphere is necessary to encourage the integration of behaviors with values, which is necessary to yield beneficial social outcomes while resisting actions that will result in negative social outcomes (Shapiro & Naughton, 2015).

Summary and Conclusions

Values are the deepest manifestation of culture, and behaviors are the demonstrated expressions of values (Hofstede et al., 2010). Instantiations are the

manifestations of theoretical ideas as actions and behaviors and provide real-life examples of values in action. As such, instantiations may be used as value definitions when creating the VB statement. Congruence between stated values and actions must be demonstrated for individuals and organizations to be trusted and establish credibility as well as contribute to organizational performance. While creating a VB statement for a new CoP, it is essential to create and maintain an inclusive and humanizing atmosphere so that participants will be comfortable in contributing to the process. Without full participation, stakeholders will be left out and the end product will be incomplete.

Communities of Practice

A CoP is a collection of people who share intellectual resources and skills as an effective learning process within their community and who have similar worries, issues, or interests about activities or topics that bind them together (Farnsworth et al., 2016). Group mores are demonstrated by information sharing, a feeling of group membership, and member interaction (Li et al., 2009). For the CoP to thrive, consistent communal structure and practice are required, with members agreeing to pursue a common purpose (or domain) in preserving organizational health and structure (Wenger et al., 2002). An individual's sense of responsibility and contribution of resources to the CoP heightens their commitment and willingness to engage with others, strengthening communal well-being (Boyd & Nowell, 2017).

Community

When individuals contribute to their environment and the people around them and see the impact of their contributions, they connect with others in a sense of community (Cluff, 2022). The behaviors the community anticipates based on its norms and goals are known as group culture and style (Comeau, 2019). Although the term community can be applied to those who dwell in a defined geographic location such as a borough, a group gathered for a specific event, or an aggregation of an ethnic group, the notion of a collective sharing in the oneness of condition, purpose, need, or all three is a thread common

throughout definitions (Jewkes & Murcott, 1996). In the workplace, a sense of community functions as a job resource that contributes to needs satisfaction and adds to employees' resource gains and recovery, contributing to workplace well-being (Scotto di Luzio et al., 2019).

Communities of Practice Theoretical Foundations

The term "Communities of Practice" is a byproduct of Lave and Wenger's (1991) proposal that learning, rather than being the reception of information or factual knowledge, is social in nature and can be better attained by participating in a social setting, first at the periphery, then gradually increasing in engagement and complexity. Their original description of CoP implied a system where participants share understandings and meanings associated with their activities, lives, and communities (Lave & Wenger, 1991). Through the years, definitions have evolved as CoPs have moved into a growing constituency. The World Bank Group (WBG; 2021) recently described the CoP as "a gathering of individuals motivated by the desire to cross organizational boundaries, to relate to one another, and to build a body of actionable knowledge through coordination and collaboration" (Communities Reinvented, 2021b).

Frameworks

CoPs are found in both academia and the corporate world, with their framework varying according to the application: the learning organization seeks to increase educational achievement by connecting students with common needs and interests, whereas professional objectives are centered on job tasks, information resources, and individual competence (Kim et al., 2018). CoPs provide a model for organizing as well as a pedagogical framework for professionals to understand the meanings of being and functioning within their field (Jenkins & Endersby, 2019). The WBG describes the CoP framework as the purpose of the community, people who make up the community, and practice of the organizing principles of the community (Communities Reinvented, 2022).

Characteristics, Attributes, and a Social Interaction Scale of Success

The CoP is distinct from other groups because of three crucial characteristics: (a) domain (a focus on shared interests and competencies), (b)

community (a group of individuals who share information, help one another, discuss issues, and engage in joint activities), and (c) practice (actual practitioners who share purpose and have similar repertoires of resources; Wenger, 2011). In the realm of teaching and learning, valuable CoP attributes are as follows: structure, productive social environment, learning, mutual support, diversity, willingness to take risks, an expectation of results, and growth over time (Wilson-Mah et al., 2022). Borrego et al. (2007) suggested a social interaction scale of measurements of the success of CoP's, ties that are weak (acquaintance), intermediate (conversed about projects together and established commonality), or strong (collaborated on a research idea), as assessed using two questions: did participants form new working relationships or revert to previous ones? and have the new relationships become long-lasting? For employers, the sense of connection and community that comes with successful CoPs can serve as a job resource, contribute to needs satisfaction, and add to participants' energy and vigor (Scotto di Luzio et al., 2019). Finally, the successful CoP is accessible. The more difficult it is to connect with other members, the less likely researchers are to engage with it (Freeman et al., 2022).

Applications and Examples

In an engineering education program, the CoP format was used to draw students from the periphery of the profession into the mainstream by fostering communication as a tool for both coaching and group learning, preparing them for the transition from mentor-focused learning to working on the facility floor (Gilbuena et al., 2015). A group of undergraduates studying middle school education as preservice teachers worked on a video project and found themselves organically creating a CoP without the intention to do so (Kaschak & Letwinsky, 2015). Participants in higher education CoPs noted that the familiarity engendered by the community eased accessibility when they needed assistance with qualitative research or specific tools and noted a greater inclination to use their CoP connections rather than those created by more formal relationships (Freeman et al., 2022). Participants in seminars and workshops for global education initiatives found that the times in between scheduled instruction, where they fellowshipped and discussed their field experiences and service learning applications, were where

they asked one another the hard questions about the rewards and limitations of challenging tasks (M. Porter, 2003). In a communications workshop fostering distributed cognition, where every learner contributed to the learning of every other learner, various perspectives and expertise were shown to be invaluable for both individual and group learning (Donath et al., 2005).

Critiques

The subject of CoPs as a learning model has generated much discussion within the academic community (Hughes et al., 2013). Since CoPs were first described, there has been a debate between the value and efficacy of learning as the acquisition of knowledge (the standard learning paradigm) and learning through the experience of participation as presented in CoP theory; the chief criticism being the lack of developed pedagogical structure in CoPs (Fuller, 2013). Fuller (2013) also noted that the term 'community' can be criticized as an indicator of togetherness and harmony at odds with the history of personal and organizational disputes found in industry and mentioned the importance of considering the context of the immediate community in such discussions. As a business or industrial application, there is a danger of the CoP moving from a learning and information-sharing experience to a method of indoctrination by those who hold power or resources necessary for the community to function (Hughes, 2013).

The learning theory debate continues and is worthy of consideration in academic circles. Although not germane to the purpose of this research, it has been included to provide context. Billett (2013) answered the pedagogical criticism by emphasizing the experiential nature of CoPs as one of many learning modalities, relating it to lifelong learning and presenting it as foundational to the personal connections necessary for a CoP's social function (Billett & Pavlova, 2005). The exertion of power over the function of the CoP is also worthy of consideration because, although informal CoPs may thrive for a while, logistical support is necessary to maintain success over time (Wenger et al., 2002). Ideal conditions for a professional CoP include infrastructure and administrative assistance, community members/participants, and outside subject matter experts (Sorenson & Milbrandt,

2015), along with an institutional support system willing to grant liberty in the CoP's activities (Farnsworth et al., 2016).

Communities of Practice and Collaborative Inquiry

Facilitators and members of the CoP share the responsibility of creating a community of inquiry within the CoP, establishing a set of shared standards, norms, terminologies, and processes (V. Friedman, 2006). Community members should expect to hold one another accountable for community maintenance. The work of Smith et al. (2019) on facilitating an emergent curriculum to develop leadership practices with owner-managers of small businesses demonstrated that CI could be used in a CoP atmosphere in retail and commercial work. Project participants were independent businesspeople, indicating that the CoP paradigm should not be limited to educational institutions. However, Smith et al. conducted their research with a small group, and the researchers suggested further investigation could add to the work they began.

Cardinal et al. (2021) worked with a coalition of academics and community activists to create an actionable document as a CI project to foster language access for those who speak languages other than English in and near Puget Sound, Washington. After hosting a workshop to evaluate regional language access issues, they conducted a CI to create a values statement for organizational change efforts. After four cycles of inquiry, the group was satisfied it had created a statement worthy to serve as a foundational document for further organization efforts. Variations of collaborative inquiry for CoPs such as collaborative self-studies and other group works have been done with groups of limited size and narrow professional focus within educational CoPs, indicating that there is room for further investigation in the context of business and civic circles (Wilson-Mah et al., 2022).

Summary and Conclusions

Although the research presented in this dissertation involved a single CoP's formation through the CI process of self-definition and agreement on CoP values, behaviors, and goals for a 10-month leadership fellowship operating in an atmosphere of shared leadership, I have provided a broad overview of CoPs to

establish the context of group learning through social interaction and the sharing of various resources, expertise, and perspectives that should be evident in all CoPs. I have discussed the responsibilities of both the individual and the community, the founding and development of the defined term CoP, and the basic frameworks of both academic and professional CoPs, noted their crucial characteristics and attributes, and provided a brief descriptive social interaction scale of success along with examples of actual CoPs in academic and professional settings. Also addressed in this chapter are the areas of criticism of CoPs, their counterpoints, and suggested solutions.

The CoP is an essential building block for cultural progress and transformation, a repository of institutional knowledge, a nursery for innovation and new ideas, and a de facto professional university for both novices and veterans. It can be a safe laboratory where failures are celebrated for identifying what will not work, and successes are closely examined to determine how they may be refined and improved. The formation of a new CoP is both exciting and daunting. It must be approached with respect for the hosting institution and care for the individuals who will populate the community. Such considerations help establish the context for creating a VB statement.

Summary

The literature review addressed the three major aspects of the research: (a) CI as an arm of AR and the primary vehicle for the phenomenon addressed in the project, (b) individual and corporate values and their relationship with associated behaviors as information being generated by the CI, (c) and the history, structure, and functions of the CoP that served as the laboratory in which the research took place. In my discussion of CI, I noted the importance of frank communication, trust, transparency, and vulnerability for successful inquiries to take place. The social interaction and common goals of the CoP provide an environment suitable for CI to flourish. The establishment of a common set of behaviors to be used as definitions for group values will be empowered by the atmosphere of a CI

operating in the context of a CoP and the practice of shared leadership within the community.

Chapter 3 – Methodology

To date, the research on CI by professional groups has been limited to the product of research or business leadership skills developed by participants (Cardinal et al., 2021; Smith et al., 2019). No research has been published illuminating the experiences of a group of professionals using CI to create a VB statement in the early stages of forming a CoP. This case study involved personal interviews with the participants and other observational techniques to yield a contextual understanding of individual and group meanings derived from the inquiry and to identify the value individuals and the group as a community may have gained. In this chapter, I discuss my research strategy, how my worldview supports this research, and my strategy to identify and address personal and cognitive biases. I also describe the participants and the environment in which the CI occurred and outline how the CI was executed through a bricolage process. The description also covers the interviews and the coding process, along with instrumentation, validity, and reliability strategies. I conclude the chapter with a summary of ethics safeguards used to protect participants and the integrity of the research process.

Design and Rationale (Case Study Protocol)

Timeline

The events that provided the context for the research occurred in accordance with the program event timeline established by Leadership Stockton. The cohort met for the first time as a group on August 4, 2023, for a 3-hour program orientation that included introductions and a facilitated exercise to discuss each participant's reasons for participating in the program. The second meeting was an all-day "Leadership Dynamics" session held on Friday, August 11, which provided the setting for the CI that produced the VB statement. It was the first time the cohort worked together as a group. During this session, the cohort split into four small groups that worked to create service project proposals. The Leadership Stockton program director distributed the completed VB statement to the group via email before the next session. The cohort did not meet as a whole again until 6

weeks later, on September 22, when they convened for a 2-day retreat for more team building, to present their proposals, and to come to a consensus, narrowing down the proposals to a single service project. I conducted semistructured interviews with volunteer participants after the Leadership Dynamics session and again after the retreat.

Research Questions

The objective of this case study was to understand professionals' experiences as they used CI to establish a VB statement and the effects the CI and the resulting document had on the forming of their CoP. The exploration of their experiences focused on how participating in a CI to establish how the VB statement affected the establishment of a CoP and the personal and communal meaning found in the process. The research questions were as follows:

RQ1: How do participants think the experience of using CI to establish the VB statement affected the development of the cohort as a CoP?

RQ2: What meaning did the individual participants derive from using CI to develop the VB statement?

RQ3: How did using CI to develop the VB statement influence the individual participant's experience?

RQ4: What, if any, value did the shared experience of belonging to a CoP and using CI to develop the VB statement contribute to the formation of the group's corporate culture?

Conducting a Case Study on a Hermeneutic Foundation

I used a hermeneutic cycle information-gathering process to inform a case study research approach to this project. Hermeneutic research is based on understanding communications in light of the intention and meaning behind impressions—discerning how the underlying structures or dynamics of the experience can reveal the central meaning and unity that lead to an understanding of the essence and substance of the experience (Moustakas, 1994). To understand experience, Heidegger et al. (2008) established the need to acquire the ability to understand self and how it relates to surroundings to a deeper sense of being, labeling it "Dasein" (p. 32), an important feature of the

hermeneutical process that begins with identifying one's biases and how they affect one's perception of events. According to Gadamer et al. (2013), understanding is not a passive reception of information, but a mingling of the learner's preconceptions and the information being presented—the observer's biases influencing their understanding and the resultant understanding shifting their preconceptions and so on, resulting in a learning spiral known as the hermeneutical circle. Heidegger's approach is not to make the effort to suspend one's understanding by bracketing, as Husserl demanded (Eruka, 2023), but to recognize Dasein as a participant in the process of acquiring knowledge through engagement: acknowledging presuppositions and expecting self to grow and learn, then taking the growth and learning back into the hermeneutical circle of inquiry to engage in further pursuit of knowledge (Blattner, 2006). "In sum, acting and thinking, practice, and theory, are linked in a continuous process of critical reflection and transformation" (Schwandt, 1998, p. 191).

Intended Outcome

The purpose of the CI exercise was to establish shared desires for behaviors within the CoP and use them to establish an agreed-upon set of community values to establish a community identity and sense of belonging (Branson, 2008). The objective of this case study was to explore the meaning of the lived experience for participants and articulate the greater group cultural and social meanings discovered to contribute to the organizational leadership research body of knowledge.

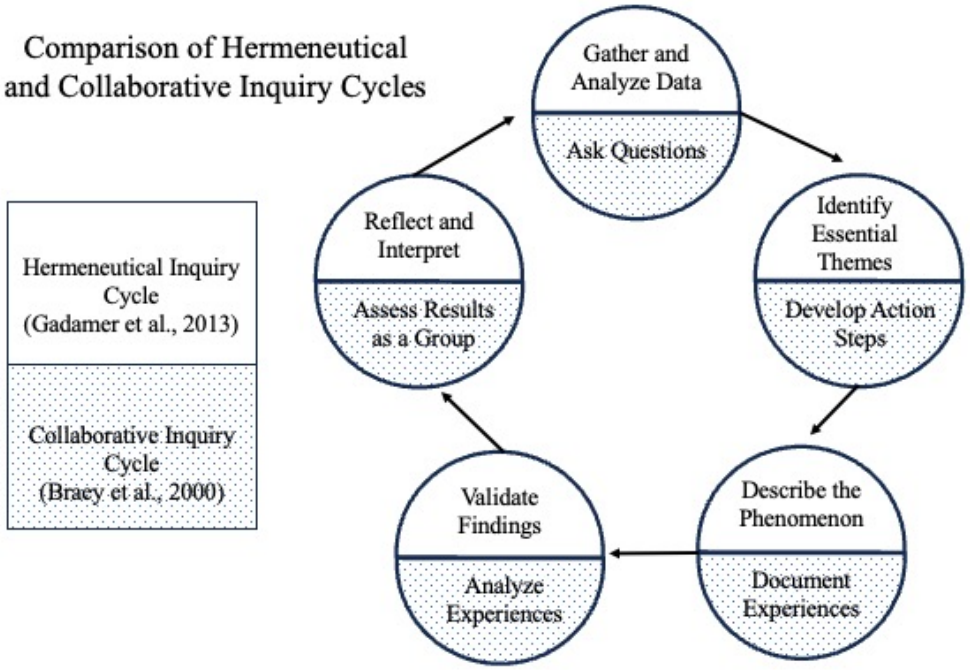
Why a Hermeneutical Approach?

CI is a group exercise with a structure similar to the hermeneutical circle of inquiry (Bray et al., 2000; Gadamer et al., 2013). Both cycles begin with a question, followed by taking action to narrow the inquiry, interpreting and assessing results to clarify the inquiry further, and continuing the process until the group arrives at one or more conclusions (see Figure 2). As the facilitator for the CI, I served as a co-inquirer, functioning as both an observer and a participant. In doing so, I gained deeper insights into the process while pursuing a richer end product of the inquiry (Kakabadse et al., 2007). To ensure research integrity, I

practiced regular and deliberate self-examination to recognize and address my biases (see Creswell & Poth, 2018).

Figure 2

Comparison of Hermeneutical and Collaborative Inquiry Cycles



Note. Created by the researcher.

Participants

Researcher Worldview

The researcher is responsible for considering the effect of personal perspectives and philosophical assumptions on the research process (Creswell & Poth, 2018). As a practitioner, I have found a pragmatic worldview works well in facilitating group efforts toward growth and change. A pragmatic approach supports the role of an objective observer whose primary duty is to keep the group on the task to pursue their goals (R. M. Schwarz, 2002). A pragmatic worldview is practical: it is concerned with what works and finding solutions, and it is motivated by situations, actions, and consequences (Creswell & Creswell, 2018). As such, it served as a reasonable platform for exploring the effects of a CI to establish a VB statement in forming a new CoP in this study. A case study is not only the pursuit

of the product of an inquiry but also a study of the process of the inquiry (Denzin, 2008), particularly the process of a CI. Thus, a practical approach of observation, gathering individuals' descriptions, and distilling them into a comprehensive portrayal of the subject is indicated.

The Researcher as Facilitator (Participant Observation)

As noted earlier, I served as both an observer and a participant, facilitating a CI for a diverse group of 32 participants as they formed a new CoP. Before the start of the program, I did not know any of the participants beyond a passing professional acquaintance. I am an alumnus of Leadership Stockton's class of 2007. In the years following my participation as a cohort member, I served in various roles as a support person for class retreats. In 2011, I began working with the group coordinator to support the formation of a sense of community within the cohorts during their first two meetings and the subsequent class retreats. I did this by providing training in formal leadership theory at first, and then working with members of the Chamber to create and refine a streamlined proposal template to assist cohort members in researching and building their project proposals. Since 2013, I have also facilitated each Leadership Stockton cohort through the CI process of creating their VB statement. As a CI and action research facilitator, I am committed to a humble inquiry approach, asking questions rather than sharing the diagnostic observations I may have made (Schein, 2013). I firmly believe and practice that a group's autonomy and long-term effectiveness are best served by growth away from dependence upon the facilitator and toward communal interdependence (R. M. Schwarz, 2002).

Participant observation is a research method commonly used in qualitative studies, including ethnographies and case studies, where the researcher actively engages in the activities of the group being studied (Spradley, 2016). In this approach, the researcher participates in the social context under investigation, allowing a deeper understanding of the subject matter by actively experiencing the phenomenon from the inside. This method often involves both observation and participation, allowing the researcher to gain insights that might not be possible through mere observation or interviews alone (DeWalt & DeWalt, 2011).

It is incumbent upon a researcher who participates in the phenomenon being researched to exercise reflexivity as a means of quality control, exploiting the benefits of their familiarity with the subject while monitoring for and addressing any potentially negative effects (Berger, 2013). Self-awareness (knowing oneself and what one brings to the research) provides insights into how the research is shaped and allows the contextualization of the analysis (Braun & Clarke, 2022).

Biases

In an earlier career, I was professionally trained in interview and interrogation, hostage/crisis negotiations, and targeted violence threat assessment and management. I have conducted hundreds of structured and semistructured interviews with various persons, from crime victims to child molesters and hopeful young men and women seeking careers in law enforcement. A substantial portion of my training included techniques to identify and eradicate my personal biases, augmented by various techniques for empathizing with interviewees and metaphorically find out where they were and go to them rather than expecting them to come to me (McMains & Mullins, 2001; Strentz, 2006, 2013).

With that in mind, I realize that, despite my training, I remain well-equipped to manifest various biases and must diligently monitor myself to recognize their presence. Along with nurturing a conscious determination to show respect and dignity to whose racial, ethnic, and cultural backgrounds are different from mine, I must consider certain cognitive biases. I have learned that I must be aware of confirmation bias, which is favoring things that confirm my existing beliefs (Nickerson, 1998), the halo effect, which means letting a positive or negative impression color subsequent judgments regarding the individual or situation (Pohl, 2016), survivorship bias, referring to relying on information available from successes absent the ability to analyze failures (Wald et al., 1984), and the curse of knowledge, wherein one attributes their mental state to others (Hannon, 2020). I particularly appreciate the curse of knowledge, as Hannon contended, those who manifest it tend to possess intellectual humility, an attribute particularly useful for the hermeneutical method (Blattner, 2006). The most effective way I have found to monitor and ameliorate cognitive bias is to work

through a mental checklist before beginning interviews or processing data (G. J. Thompson, 2004).

Research Subjects

Participants in Leadership Stockton, a 10-month educational service fellowship administered by the Stockton California Chamber of Commerce, were the volunteer research subjects. Stockton was recently named the most diverse city in the United States (US News & World Report, 2020). The Chamber is careful to recruit participants from all communities nested within the greater community in a deliberate effort to have each year's cohort reflect the local population. Participants are people of ambition who come together from local businesses, not-for-profit, and civil service organizations to learn about various leadership aspects of city and county government, culture, and community (Leadership Stockton, n.d.). In total, 32 members enrolled in the cohort participated in this study. I recruited the program coordinator and an alumnus volunteer to observe but not participate in the CI and provide a measure of ethical compliance, validity, and reliability as an objective observer.

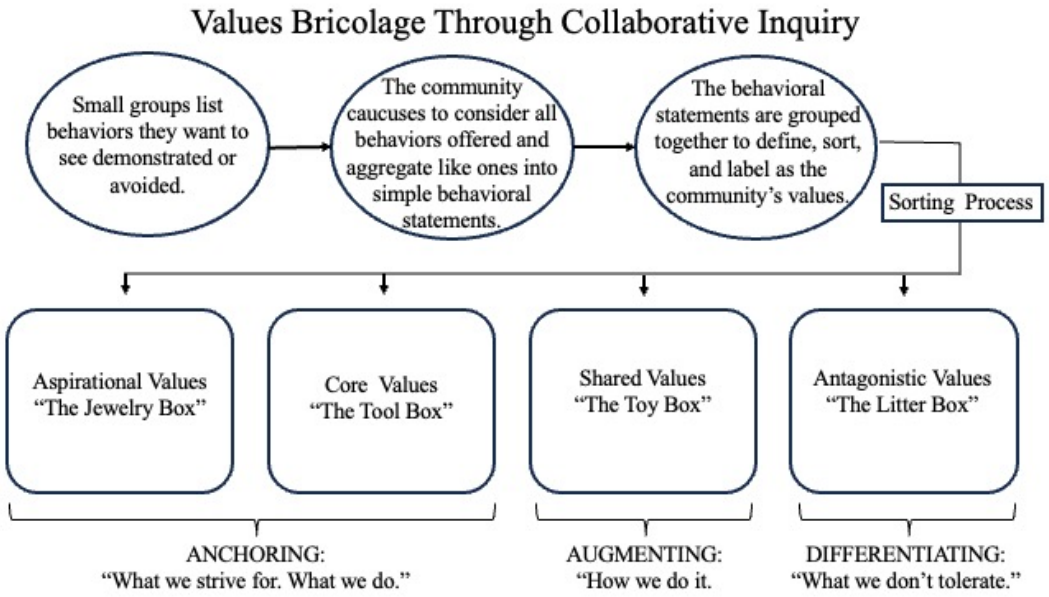
Values Bricolage Through Collaborative Inquiry

The CI is part of the "Leadership Dynamics" day for the cohort. The CI occurred after lunch, with the morning spent in team-building activities facilitated by the local County Office of Education staff and an orientation in creating and presenting group project proposals. The CI began with an introduction of the CI process timeline (see Appendix C: Values and Behaviors Collaborative Inquiry Facilitator Guide) and a review of the purpose of the inquiry (to articulate behaviors that community members agree should be practiced and avoided) followed by a synthesis of like behaviors under values titles to create a VB statement for the CoP. I split the cohort into groups of three and four via the random placement of their table-tent name tags, something the program coordinator does for every meeting to encourage members to widen their circles of acquaintance within the CoP.

After instructions to include contributions from every individual, each group created a list of behaviors they wanted to see practiced or avoided by all cohort members. Upon reassembling the cohort, I facilitated a group discussion and consideration of all the behaviors. I then aggregated like behaviors and gathered them into simple behavioral statements. Sorting and grouping related statements together as values descriptors and then labeling/naming them as shared community values followed. The final act of the bricolage was to classify the values according to their functions: anchor values – terminal values that define the group, augmenting values – instrumental values that empower the group's actions, and differentiating values – antithetical values that are to be avoided (see Figure 3; Perkmann & Spicer, 2014; Rokeach, 1973). The classification process is intended to serve the same purpose as a subject summary: a final review that provides essential context, reiterates the purpose of the exercise, shows how the values relate to one another, and adds another memory niche (Cramm et al., 2017).

Figure 3

Collaborative Inquiry Bricolage



Note. Created by the researcher. Process and definitions informed by research (Bourne & Jenkins, 2013; Bray et al., 2000; Lencioni, 2002; Perkmann & Spicer, 2014; Reason & Bradbury, 2006; Rokeach, 1973; Schwartz, 2017; Schwartz et al., 2017).

I created a series of labeled "storage boxes" to provide a mnemonic device for CI participants. Aspirational values are the values that members see as what the organization should strive for—values that define best intentions (Bourne & Jenkins, 2013). Because they are highly valued, I labeled their location "The Jewelry Box." Core values are principles that are so deeply ingrained in operations that they guide all of the organization's actions as cultural cornerstones (Lencioni, 2002). Because they are essential to the organization's day-to-day operations, I labeled their spot "The Tool Box." Shared values are those shared by leaders and followers—the common ground upon which all community members can meet in a spirit of unity and cooperation (Bourne & Jenkins, 2013), hence the label "The Toy Box." Finally, it is usual for people to be unable to accurately articulate what they want but readily describe what they do not want to tolerate. Values encourage some behaviors and obviate others (Schwartz et al., 2017). Drawing on Schwartz's (2017) model that illustrates the tension between differentiating values (see Figure 1), I labeled the intellectual parking spot for antagonistic values "The Litter Box."

Data Collection

To ensure a comprehensive understanding of the case, gathering ample data until data saturation was achieved was essential (Ness, 2015). For this study, I used data from every group session and round of interviews to shape subsequent interview prompts and stimulate further inquiry into the sessions I had already examined, per Creswell and Poth (2018). I employed various data sources, including video footage of the CI, workshop notes from participants, and my observations during the orientation session, the CI itself, social interactions, and the two-day retreat to pursue data saturation and triangulation (Carter et al., 2014; Saldana et al., 2011). Data collection methods were tailored to the specific event venues.

As a direct participant in the CI, I reviewed the primary event video and my personal notes for a comprehensive understanding. I documented the materials generated during the exercise to create a chronological account of the bricolage process. Additionally, I maintained a reflective diary of my observations of the

group dynamics during the initial introductory session, the CI session, and their interactions at the retreat. My role also included collecting and storing written drafts produced by small groups, which informed the final VB statement. Furthermore, I captured informal comments from cohort members made to me and among themselves throughout all sessions.

I conducted interviews in two phases, first within 2 weeks of the CI and then after the cohort's retreat to select their service project (6 weeks after the CI). Although both interviews addressed specific research questions (RQs), the initial interviews emphasized RQ2 and RQ3, focusing on individual experiences with CI and its impact. In contrast, the subsequent interviews emphasized RQ1 and RQ4, exploring the effects of CI on the cohort's development as a CoP and its influence (if any) on the group's corporate culture (see Table 1). The interviews guided by these RQs were semistructured, encouraging the participants to express their experiences openly (Saldaña & Omasta, 2022). The primary objective was to collect detailed statements, which were then synthesized into common themes shared by the entire cohort, following the systematic approach by Creswell and Poth (2018). All interviews were recorded, transcribed using Otter, and offered to each participant to validate their accuracy before coding.

Table 1

Research and Interview Questions

Research Question	Related Interview Questions
RQ1 – "How do participants think the experience of using CI to establish the values and behaviors statement affected the development of the cohort as a CoP?"	IQ2: In your personal experience, could you please describe how the CI process influenced the group dynamic?
	IQ6: Please describe any significant outcomes that you think the cohort realized from the CI experience.
RQ2 – "What meaning did the individual participants derive from using CI to develop the values and behaviors statement?"	IQ1: (Icebreaker) What are your impressions of the collaborative inquiry process?
	IQ5: Please describe any significant outcomes that you personally realized from the CI experience.
	IQ7: What (if anything) did you find most fulfilling about the CI experience? Why?
	IQ8: What (if anything) did you find frustrating? Why?

Research Question	Related Interview Questions
RQ3 – "How did using CI to develop the values and behaviors statement influence the individual participant's experience?"	IQ7: What (if anything) did you find most fulfilling about the CI experience? Why?
	IQ8: What (if anything) did you find frustrating? Why?
	IQ9: Looking back on the experience, what could have enhanced the CI process?
RQ4 – "What, if any, value did the shared experience of belonging to a CoP and using CI to develop the values and behaviors statement contribute to the formation of the group's corporate culture?"	IQ3: In your personal experience, could you please describe how the resulting communal values and behaviors (VB) statement influenced the formation of the group's corporate culture?
	IQ4: In the context of the shared experience, how would you describe the significance of the VB statement?
	IQ6: Please describe any significant outcomes that you think the cohort realized from the CI experience.
Clarification Questions	IQ9: Looking back on the experience, what could have enhanced the CI process?
	IQ10: Do you have anything to add?
	IQ11: Do you have any questions for me?

Although interviews were a vital tool for gathering information, I also retained the whiteboard work from the introductory session, video recorded the CI session and retained all of the CI materials, such as notecards and poster paper used to list desired behaviors compiled by small groups in the bricolage process, and coded them accordingly. They provided additional aspects of how the participants participated in and perceived the experience (see Moustakas, 1994). I recorded my impressions of the CI and included my observations of the cohort's exchanges during the day's other activities and at their retreat to provide context for the group's experiences.

Interview Introduction and Questions

The interview began with the following statement: "Thank you for your time and willingness to assist me in this research project. As we discussed earlier, our intent is to explore the effects of using collaborative inquiry (CI) to create a communal values and behaviors statement for this year's Leadership Stockton community of practice. We will discuss your experience as an individual as well as

your impressions of the effects the exercise had on the culture of the community. I presented a briefing to the group about the CI process prior to the exercise, but would like to offer to answer any questions or provide any clarification you might want before we get started."

The first interview followed the CI, and the second, which occurred after a two-day retreat, allowed more group interaction approximately 6 weeks after the CI. Although I asked all questions in both interviews, the first emphasized personal experience, whereas the second emphasized group dynamic questions. The second interview was less structured than the first interview, following the hermeneutic inquiry cycle of using knowledge gained to inform subsequent rounds of inquiry. The questions asked in two interviews are as follows:

IQ1: (Icebreaker) What are your impressions of the collaborative inquiry process?

IQ2: In your personal experience, could you please describe how the CI process influenced the group dynamic?

IQ3: In your personal experience, could you please describe how the resulting communal values and behaviors statement influenced the formation of the group's corporate culture?

IQ4: In the context of the shared experience, how would you describe the significance of the values and behaviors statement?

IQ5: Please describe any significant outcomes that you personally realized from the CI experience.

IQ6: Please describe any significant outcomes that you think the cohort realized from the CI experience.

IQ7: What (if anything) did you find most fulfilling about the CI experience? Why?

IQ8: What (if anything) did you find frustrating? Why?

IQ9: Looking back on the experience, what could have enhanced the CI process?

IQ10: Do you have anything to add?

IQ11: Do you have any questions for me?

Coding

I chose coding techniques that concentrate on literal meaning and effects felt by the subject—in vivo coding, where interview transcripts are searched to mine phrases and words that infer the essence of the participant's expressions of the experience (Saldaña & Omasta, 2022), process coding, which entails looking for words and phrases that indicate actions, developmental process or psychological activities associated with the participant's experience (Fabrigar et al., 1999; Saldaña & Omasta, 2022), and values coding, where any influence the experience has on the participant's worldview, social beliefs, and attitudes is considered and articulated (Saldaña, 2021). I coded by hand, using ChatGPT to perform word counts and assist with some data sorting.

Validity and Reliability

I had the advantage of engagement beyond the specific CI because I served with the cohort throughout their orientation, during the CI at their team building day, and the retreat where they chose the class service project. In conducting interviews following the CI exercise 6 weeks after the cohort's two-day leadership retreat, I supported the heuristic principle of returning to the data to verify the synthesis of meanings to accurately portray the CI and its impact (Moustakas, 1994). All interviews were recorded and transcribed using Otter. I reviewed the transcripts while listening to the recordings and confirmed their accuracy with each participant. I pursued further validity through reflective conversations with the program coordinator and a recent LS alumna who observed but did not participate in the CI.

As enough data had to be gathered to ensure corroboration, it was incumbent upon me to achieve data saturation, where all available data sources were gathered (Creswell & Poth, 2018). To ensure saturation for this study, I not only had to be careful to use data collected from each session and cycle of interviews to inform the prompts for subsequent sessions or cycles but also had to take extensive notes of the CI process by carefully viewing a video recording of the

event. This approach facilitated the documentation of the process of data collection, observations, and written reflections as they occurred.

Ethics

To ensure compliance with accepted research ethical guidelines, I recruited the participants on a strictly voluntary basis. All research data are held on password-protected computers and/or password-protected external solid-state drives and will be deleted/destroyed on the fifth anniversary of the final publishing of this dissertation. The chamber of commerce that administrates the fellowship endorsed this research, with written permission from the chamber to conduct the study on file and submitted to the Southeastern University IRB. All participants signed a standard informed consent document and received a copy, including assurance of confidentiality and protection of their rights as participants. Three participants decided to terminate their participation after the CI was concluded. They were omitted from all personal data gathering, and no record of their individual participation is included in this dissertation. The Southeastern University IRB approved this project.

Summary

I have outlined the research strategy for my dissertation project in this chapter, including the rationale for using a hermeneutic approach and comparing the CI and hermeneutical inquiry cycles. The chapter also included a description of how the intended outcome of the CI compares with and informs the intended outcome of the research project. I explained how a researcher/facilitator's pragmatic worldview can support exploring the formation of a new CoP. Also presented in this chapter was a plan for monitoring and addressing any personal or cognitive biases that may have arisen during the research process. I described the research subjects and the milieu in which they operated and in which the CI was conducted. I summarized the values bricolage as practiced through the CI and explained the data collection process. The chapter also included a discussion of my instrumentation strategy, the questions used for the interviews, the coding process, prolonged engagement, conversations with non-participating observers, note-taking

during reviews of a video recording of the CI, and notes about group dynamics that were taken during CoP social and work events. I concluded by discussing the ethics safeguards I put in place to ensure compliance with accepted research ethical guidelines. In Chapter 4, I discuss the findings of the research.

Chapter 4 – Findings

This study was research into the effects of using CI as a means of research on individuals and the corporate group participating in a CI to establish a VB statement. As such, three different research events occurred. First, the group participated in a whiteboard exercise providing words and phrases that included their reasons for participating in the program, essentially self-coding their motivations. Second, the group participated in the CI to establish their VB statement, essentially self-coding in small groups by producing behaviors labels and then discovering themes as the cohort by grouping behaviors together under values labels. Finally, the data oriented toward answering the RQs were gathered through observations, interviews, and CI session artifacts, coded, and finally themed (see Table 2). Thus, this study was research not only on organizational leadership but also into the effects that conducting communal research may have on the community conducting the research.

Table 2

Data Gathering Events

Research Event	Data Gathered	How Data Was Processed	Purpose
Whiteboard Exercise	Reasons for Joining	Self-Coded by Individuals	Introductions and Establishing Communal Familiarity
Collaborative Inquiry (VB)	Behaviors and Associated Values	Self-Coded by Small Groups, Self-Themed by the Collective	Produce the Values and Behaviors Statement
Collaborative Inquiry (RQ) Interviews	Experiential Impressions	Coded and Themed by the Researcher	Inform the Research Questions

This chapter includes a description of the setting for the CI, the CI as an event, and the findings of research into the effects of the CI, indicating how the coding of the orientation session, the CI, and the VB statement provided context for the interviews. It concludes with a presentation of the coding of the interview

responses and the composition of the final qualitative data set, along with the data as they relate to the themes and RQs.

Each year in Stockton, California, the Greater Chamber of Commerce recruits a group of professionals to participate in a 10-month long fellowship to learn about the community and how they might serve to improve it. In addition to forming a shared leadership learning community, the group must split into smaller groups to create community service project proposals and then reconvene to choose a single project. In practical terms, the class must establish a group identity in two to three gatherings in less than two months to agree to work together in the pursuit, creation, and execution of a large civic service project chosen by internal competition. The Chamber addresses this issue by arranging for a short introductory session where members introduce themselves and receive an orientation, followed by a Leadership Dynamics Day where they play team-building games, receive orientation on how to build a project proposal, and participate in a group CI to build a VB statement. The VB statement serves as a touchstone for decision-making, provides verbiage for communication during conflict, and functions as a behavioral foundation for the group as a CoP. Approximately one month after the Leadership Dynamics day, the class goes on a two-day retreat to present their service project proposals and choose one for their class service project.

This research was a case study of how the CI and the resultant VB provide meaning to the individual participants, the group experience, and the resultant corporate culture. The following research questions guided this study:

RQ1: How do participants think the experience of using CI to establish the VB statement affected the development of the cohort as a CoP?

RQ2: What meaning did the individual participants derive from using CI to develop the VB statement?

RQ3: How did using CI to develop the VB statement influence the individual participant's experience?

RQ4: What, if any, value did the shared experience of belonging to a CoP and using CI to develop the VB statement contribute to the formation of the group's corporate culture?

Chronology of Events

Pre-Inquiry Phase – Setting the Stage

Individuals who enroll in Leadership Stockton expect to be part of a CoP, even if they are not familiar with the term. The first three sessions the group had together provided venues for the social intercourse necessary for CoP formation along with the data necessary for this research (see Figure 4).

Figure 4

Research and Data Gathering Timeline

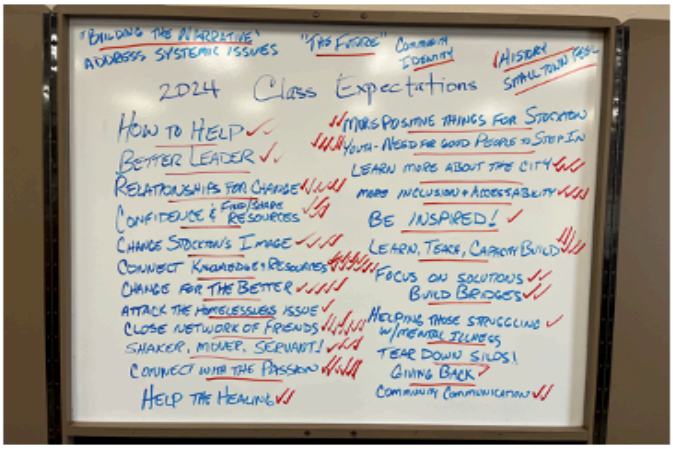
Their first meeting was an afternoon orientation session 1 week before Leadership Dynamics Day, which was the day of the formal CI. Following a presentation of the history of the program and some administrative housekeeping, each person introduced themselves and stated their expectations from their participation in the program in a few words. The program coordinator and facilitator encouraged them not to limit themselves to a single expectation. Their expectation phrases were tracked on a whiteboard as the event proceeded, with checkmarks indicating repeated statements (see Figure 5). Because by their nature, the statements were already parsed into in vivo codes, I used process coding and values coding to develop the first set of themes for the group's participation.

The coding results harmonized with the overall purpose of the program and reflected the self-transcending values of universalism and benevolence. Networking/fellowship was most common, with service, positive change, community/inclusion/accessibility, and learning/personal growth following in that order. The themes found during the introductory session were building the CoP,

service to the civic community, and personal growth. These introductory themes are discussed in the context of the CI later in this chapter.

Figure 5

Personal Expectations From the Orientation Session



Expectations Ranked by Number of Mentions – 124 Comments

12 "Connect Knowledge and Resources"
9 "Close Network of Friends"
9 "Connect with the Passion"
(to do good things for the community)
9 "Relationships for Change"
6 "Change for the Better"
6 "Learn, Teach, Capacity Build"
6 "Youth Need for Good People to Step In
5 "Shaker, Mover, Servant!"
5 "Learn More About the City"
5 "Change Stockton's Image"
5 "Confidence"
5 "Find/Share Resources"
5 "More Inclusion and Accessibility"
3 "How to Help"
3 "Help the Healing"
3 "Better Leader"
3 "More Positive Things for Stockton"
3 "Community Communication"
3 "Focus on Solutions"
3 "Build Bridges"
2 "Be Inspired"
2 "Giving Back"
2 "History"
2 "Attack the Homelessness Issue"
2 "Helping Those Struggling with Mental Illness"
1 "Small Town Feel"
1 "Tear Down Silos!"
1 "Building the Narrative"
1 "Address Systemic Issues"
1 "The Future"
1 "Community Identity"

The group displayed behavior that one would expect from businesspersons gathering for the first time in the context of creating a CoP: cordial and polite but excited to embark on a new adventure, eager to get to know one another, and seeking commonalities in their conversations.

The Collaborative Inquiry

The CI was the final event of the Leadership Dynamics Day, which began with a series of team-building games hosted by the local County Office of Education. The next session was an orientation for creating proposals for the class service project, followed by some organization time for the project groups during a working lunch. The afternoon session was dedicated to conducting the CI (For a detailed guide to preparing for and conducting a CI of this type, see Appendix C).

The session began with an orientation and a review of the "Leadership Stockton Values and Behaviors Collaborative Inquiry Agenda" (see Appendix D). The group reviewed the differences amongst aspirational, core, shared, and antagonistic values and gave examples of behaviors that illustrated them. The importance of members encouraging one another to participate and the facilitator modeling practicing active listening and showing respect by allowing individuals the space to express themselves completely was evident. The group split into small groups of threes and fours and asked to allow each person to bring at least one behavior to the discussion in the next session. The groups wrote their behaviors on poster paper to facilitate sorting by the larger group.

Initial Results

The small groups returned with 70 behaviors, many of them including values labels. The cohort then sorted the behaviors into categories through group discussion, gathering related behaviors together; for instance, the idea of assuming positive intent was presented in three different phrasings, so those pages were placed together in a column. The purpose of the discussion was to clarify the meaning the authors attached to the statement or label and allow others to ask for interpretation or explanation until all were confident that the author's intent was fully understood. The sorted groups were posted on a wall and five sticker dots were distributed to each participant, enabling them to vote for the behaviors they most wanted to be included in the final VB statement.

Narrowing the Field

The poster papers were prioritized by votes received. Those with five or fewer stickers were set aside after the group reviewed them to ensure each idea had

been given reasonable consideration in the eyes of those who proposed it. At this point, the behaviors that were conceptually related to one another were grouped by theme to move to the next phase, editing definitions based on behaviors and assigning values labels.

Editing and Labeling Behaviors

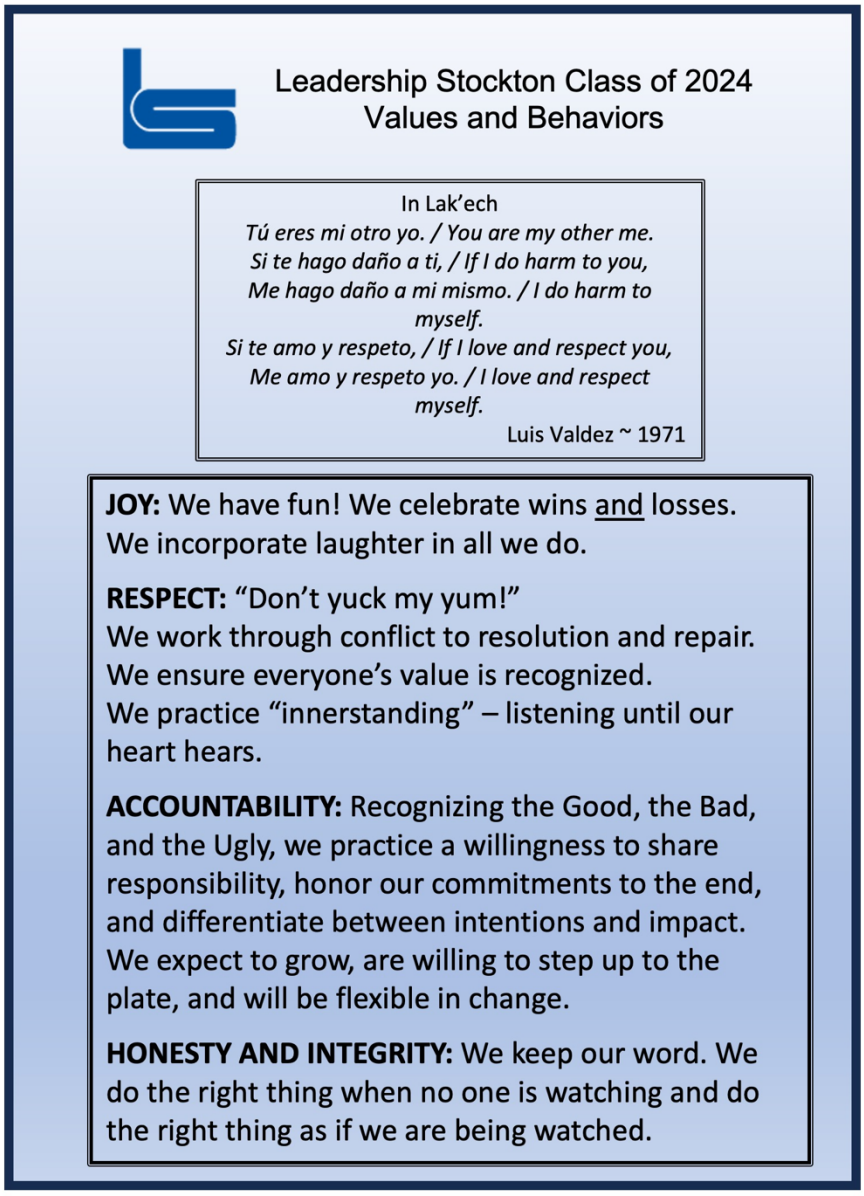
The conversation progressed through the editing of definitions by isolating salient points within the theme groups, wordsmithing them into specific behaviors, and then choosing an appropriate values label. For example, behaviors including "we tell the truth every time," "speaking honestly," "say what you need," "keep your word," and "don't be dishonest about capabilities" were grouped with the labels "Honesty," "Transparency," "Integrity," and "Lying," (which was supplemented with comments of "no trust," and "can't rely or depend on them"), respectively. After more discussion, the value label "Honesty and Integrity" was chosen with the associated descriptive behaviors "We keep our word. We do the right thing when no one is watching and do the right thing as if we are being watched." The process continued for the entire list of definitions as defined by the behaviors and were labeled as group values.

Introduction of an Innovation

At a point where the group had worked through the majority of the behaviors, one of the participants exclaimed, "You know, this is just *In Lak'ech*!" One or two other participants affirmed his statement. When pressed for an explanation, he told us that *In Lak'ech* was a poem inspired by Mayan wisdom and spoke to the need to love and respect others, thus loving and respecting yourself (Valdez, 1990). After a discussion of a digest version of the poem and the universality of the Golden Rule across ethnicities and cultures, the group overwhelmingly endorsed including it as an introduction to their values and behaviors statement (see Figure 6).

Figure 6

Values and Behaviors Statement



Note. The VB statement as published by Leadership Stockton.

The Challenge of Conflict

During the CI, various minor disagreements regarding definitions or verbiage were settled through conversation and compromise or consensus. This was expected, as the examination of conflicting ideas is at the heart of CI (Bray et al., 2000). Two instances of conflict were not so easily resolved. One of the

participants (an extrovert who tended to dominate conversations) opposed the use of the word "understanding" in the VB statement because "I don't put myself 'under' anyone!" and wanted to use the word "innerstanding" instead. Other members asked him to define the word "understanding" and further explain his stance. They challenged his dismissal of the word because he did not like the way it sounded rather than for a substantive reason associated with the definition. They argued that the alternate term "innerstanding" was "invented" rather than an actual word. The conversation became heated, and it became evident that the group was moving toward two sides hardening their positions on the matter.

One of the duties of a CI facilitator is to manage conflict toward productive outcomes (R. M. Schwarz, 2002) as well as encourage original thinking and challenge existing social structures through innovation (Denzin, 2008). As a conservative pragmatist, I had to consider my own bias toward the situation. I had already experienced the extrovert as being someone who would dominate conversations and shut down opposing points of view, but I did not want to dismiss his ideas out of hand because of personality issues. I softened the argument by suggesting the group set aside semantics and explore what an intent to pursue a deeper understanding of one another would look like. After further group conversation, I mentioned that new words enter the language all the time and offered a definition of "innerstanding" as "listening until your heart hears." The group accepted that definition, allowing the CI to move forward.

The second substantive conflict was unexpected. At a point where it looked like the group conversation regarding content definitions and meanings was nearing completion, a spokesperson for three to five members of the group insisted on revisiting a few points that had been discussed earlier and accepted by what appeared to be acclamation of all the group members. Their approach was argumentative in tone and semantic in nature. Because much of the CI conversation centered on respect and acceptance, I determined to engage them in a non-confrontational manner rather than downplay or dismiss their concerns and facilitated a group reexamination of the terms, resulting in some minor revisions of the VB draft. The small group appeared to be satisfied, whereas a plurality of the

remaining members indicated they were accepting the minor revisions as a way to move the process forward. I noticed some eye-rolls and "whatever" shrugs. With the draft complete, I led the group through a final reading of the draft and asked for any questions or disputes about the VB statement. When none was voiced, the group applauded themselves for their accomplishment of successfully creating a VB statement unique to their CoP.

Contextual Data Analysis

This study was research into the effects conducting research had on the researchers, both as individuals and as an emerging CoP. As such, three data sets were considered as context to inform the interview research directed toward answering the RQs: (a) data gained from the orientation session, (b) data from the CI that were processed by the cohort to arrive at their VB statement, and (c) the VB statement itself. These data analyses provided context and established the general mindset of the group before and throughout the CI process. The data that related directly to the RQs came from participant interviews and the researcher's notes, observations, and reflections, and I analyzed these data apart from the contextual data.

Orientation Session

In vivo coding of the group's answers to the question of their reasons for joining and their expectations of the program indicated a desire to build and participate in the community, both in the macro and micro sense. Phrases such as "connect knowledge and resources," "build bridges," "youth need good people to step in," "relationships for change," and "more positive things for Stockton" and voiced desires to assist the homeless and those struggling with mental illness indicated a desire to make the civic community a better place. Phrases such as "find/share resources," "close network of friends," "be inspired," and (be a) "better leader" indicated a desire to pursue personal growth as a member of a CoP dedicated to making a difference. Other phrases including "connect knowledge and resources," and "focus on solutions" could be applied to self, the CoP, and the larger civic community (for a word cloud of the codes; see Appendix B). The

theme indicated was Building Self, Building the Class of ’24, and Building Stockton.

Process coding was an obvious choice for a second coding pass, given the abundance of action words provided by the participants. The words “change” and “connect” were mentioned dozens of times, followed by “build,” “learn,” “knowledge,” “resources,” and to a lesser extent, “relationships,” “network,” “passion,” “healing,” and my personal favorite, “shaker, mover, servant!” The theme of Action for Positive Change was clear.

From a values coding perspective, the group described both social responsibility and altruism in their expressed desires to make positive change, “connect with the passion (to do good things for the community),” serve youth, the homeless, and those with mental health issues, and “help the healing.” They embraced the idea of stimulating positive communal change with such phrases as “more positive things for Stockton,” “change for the better,” “relationships for change,” and “address systemic issues,” connecting with the values dimensions of “Openness to Change” and “Self-Transcendence.” A positive benevolence was present in the stated desire for a “small town feel,” “community communication,” “more inclusion and accessibility,” “giving back,” and “tear down silos,” indicating a tension between conservation of tradition and a desire to address local societal flaws. Two related themes were evident: Build and Support Good in the Community and Address the Community’s Flaws. In considering and consolidating the themes gathered from the codes, the orientation session indicated that the group began the construction of their CoP with the shared themes of Building Self and the Class of ’24 and Building and Supporting Good in the Community of Stockton, with sub-themes of Action for Positive Change and Addressing the Community’s Flaws.

Collaborative Inquiry Session

The CI session exemplified qualitative research as an adventure, an exploration of group and individual desires stated as behaviors and then distilled into themes that were labeled as values (see Braun & Clarke, 2022). The cohort did both the coding and theme development for this project. The cohort was split into

small groups of three to four people and asked to list behaviors they desired to be demonstrated by themselves and fellow members as well as those they wanted to avoid. After sorting the behaviors into like groups and posting them on a wall, cohort members prioritized them via dot voting (see Table 3). After the voting, the group discussed the prioritization and sorted the themes into groups.

Table 3

Collaborative Inquiry Small Group Raw Materials

Dots	Value Label	Description/Behavior
6	Accountability (x2)	Own up to it
10	Assume Positive Intent	at all times
12	NOT Condescending	* Don't talk down to people * Being respectful * Don't cut people off when talking * Make a mental pause *Don't make judgments * Don't offer opinions * Come from a place of curiosity & ask open-ended questions?
1	Considerate	Of people's time. Be on time. Don't dominate the conversation. Give everyone an opportunity to share. Be considerate of people's feelings/experiences/traumas
10	Diversity	Appreciate each other's differences
0	Don't Yuck my Yum!	Positive Triggers - *Bringing awareness to a healing situation *Bring healing not harm
5	Empathy	Empathize what people are going through or experiences. *Putting yourself in other people's shoes. *Share your emotion.
4	Ensure everyone has Value!	(value's ARE shaped by YOUR norms & expectations) *adjust what your expectations are (cultural expectations & societal norms) *Be Open
6	Flexible to Change Fully Committed	Re-evaluate the class project's progress and participation To the class project, whether it is your first or last choice. Stay mission focused
20	Honesty (X2)	We tell the truth every time -Be true to each other. Do as you say (keep your word)
5	Honor commitments	
20	Humor – Joy	Have fun! Incorporate laughter in everything you do. We celebrate our wins and our losses.
7	Innerstanding	*Meeting people where they're at *Equality
0	Integrity	Doing the right thing when no one's watching - Doing the right thing as if you're always being watched
0	Judgment free zone	positive intention of the vocabulary used

Dots	Value Label	Description/Behavior
3	Listen (X2)	With the intent to understand (withholding judgment) - give people the chance to talk and finish their thought – Be patient
1	Lying	Don't be dishonest about capabilities - No trust - can't rely or depend on them. Say what you need
10	Non-Judgmental	Asking clarifying questions when there's still confusion. Seek to understand. Be slow to speak and quick to listen. No Preconceived notions.
30	Respect (x5)	Treat others the way you want to be treated. Be kind. Differences of opinion. Not interrupting when someone is speaking. Be open to other people's ideas and opinions. Listen to complete sentences before responding. Respecting people's opinions/input, people's priorities and beliefs. Recognize each other's strengths.
6	Say What You Need	
1	Step Up, Step Back	Encourage everyone to engage - No one person should dominate
1	Sympathy	Understanding between people. Acknowledging emotions. giving people space
1	Transparency (X2)	Speaking honestly - The Good, Bad & Ugly
5	Understand	Differentiate intentions vs. impact
3	Willingness	Everyone shares the responsibility & is willing to be part of the solution

The value/theme of "respect" was given top priority, with 30 dots affixed. The behaviors/codes associated with it ranged from the traditional "Treat others the way you want to be treated. Be kind" to the practical "Be on time," and "Listen to complete sentences before responding." Along with the positive behaviors, there was a list of condescending behaviors to avoid, including "Don't talk down to people" and "Don't cut people off when talking." The primary label of "respect" was supplemented by the label "non-judgmental," described as "Asking clarifying questions when there's still confusion," "Be slow to speak and quick to listen," and "No preconceived notions," along with the request for respect of personal choices, "Don't yuck my yum!" A prominent feature of this discussion was a focus on ensuring members would seek to understand rather than rush to be offended, as identified with the simple label of "listen."

The second-highest number of dots (20) was for the theme of "honesty and integrity" with "accountability" and "transparency" recognized as associated themes. The descriptions of honesty were remarkable in their directness: "We tell the truth every time," "Be true to each other. Do as you say (keep your word)," and the very direct "Own up to it." The group adopted one of the proposed statements to cover the subject in their VB statement: "Doing the right thing when no one is watching—Doing the right thing as if you are always being watched."

The remaining behaviors were not only communal in nature, such as "Have fun!" "We celebrate our wins AND our losses," and "Empathize," but also practical, such as "Fully committed to the class project whether it is your first or last choice. Stay mission focused." As cohort members were crafting the final draft of their work, a few of them recognized the primacy of treating others with respect and introduced the poem "In La'kech" (Valdez, 1990), a Spanish language poem based on Mayan wisdom that stressed caring for others as one cares for oneself, to the group. The cohort agreed it would be a fitting cornerstone for their VB statement (see Figure 4). Thus, the CI resulted in the broad VB statement theme of "In La'kech: You are my other me," which was manifest in the sub-themes of Joy, Respect, Accountability, and Honesty/Integrity.

Summary

The values coding for the orientation resonated with the overarching goals of the program and mirrored the self-transcendent values of universality and goodwill. Networking and fellowship emerged as the group's predominant goals followed by service, fostering positive change, community involvement and accessibility, and personal development in that sequence. Upon analysis, I identified themes relevant to community building, serving the civic community, and individual growth as prevalent during the introductory session. When considering the combined products of the orientation session and the CI, the overarching themes of respect for all (including self) and service to all (including self) emerged. These themes can be aspirational and/or operational and provided context for the analysis of the data gathered to address the RQs.

Data to Address Research Questions

Interviews and Interviewees

The first interviews occurred via Zoom in late August 2023, after facilitating the CI at the Leadership Dynamics session. The second round occurred 5 weeks later, immediately following the cohort's Leadership Retreat where they presented their various service projects and negotiated as a group to arrive at a single project. All five participants volunteered to be interviewed. They were all enrolled in the Leadership Stockton class, were present for all events covered in this research, and were in positions of leadership within their employing organizations. In keeping with research anonymity, I assigned them the pseudonyms of Annabelle, Bonnie, Brooklyn, Peter, and Coach. The first four participants gave two interviews. The first interviews after the initial CI concentrated on their initial reactions to the CI experience. The follow-up interviews occurred after the retreat and allowed them to observe the effects of the CI on the group over time and through the stresses of the project competition and the retreat experience. I interviewed Coach only once, after the retreat, during the second batch of interviews. Coach had scheduling conflicts that kept him from participating in the initial interview but was insistent on being included in the second one.

Codes

The orientation provided a profile of the group before, the CI and VB statement were the products of the CI, whereas the RQs addressed the meanings and effects of the experience of the CI on individuals and the CoP. Therefore, the coding of the participant interviews was independent from the orientation and VB statement data. Interview codes are shown in Table 4.

Table 4

Participant Interview Codes With Number of Mentions

Code	#	Code	#	Code	#
Considering Other Perspectives / Empathy	28	Time Constraints	7	From Chaos to Order	3
Commitment to Common Goals / Common Mission	19	Being Understood	6	Making and Implementing Decisions	3
VB Statement Influence	16	Respect	6	Resistance/Bullying	3
Commitment to Values	15	CI Process	5	Productive Conflict	3
Collaboration	11	Assuming Positive Intentions and Goodwill	5	Refocusing	3
Addressing Miscommunication and Seeking Clarity	11	Validation of Persons	5	CI Worked	2
Strong Personalities	11	Connection	5	Impact on Retreat	2
Personal Growth / Introspection	11	Observation & Participation (Motivating Introverts)	5	Problem Solving	2
Dissatisfaction/Negativity	11	Avoidance / Withdrawal	5	Revisiting Original Purposes	2
Gaining Familiarity With Each Other	10	Unity/Bonding	5	Influence on Behavior	2
Bridging Differences / Engagement	10	Challenging Each Other and Self	5	Failing to Listen	2
Reflective Practice / Curiosity	10	Compromise and Negotiation	4	Building and Improving Relationships	2
Communication in General	9	Finding Similarities	4	Desire for Positivity	2
Enjoy the Shared Experience	9	Balancing personal and group expectations	4	Connecting With Nested Small Groups	1
Extroverts Dominating Conversations	9	Professional Development	4	Appreciating Others' Effort	1
Comity	8	Larger Group Dynamics vs Small Group Dynamics	4	Hypersensitivity	1
"Taking sides"	8	"Giving Up The Spotlight" "Taking the Back Seat"	4	Willing to Perservere	1
Trust in the Process	8				

Code	#	Code	#	Code	#
Non-Productive Conflict	8	Initial Confusion	3	Articulating Expectations	1
Argumentation Cooperation	7	Reaching Agreement	3	Avoiding Negativity	1
Accountability	7				
				Total Codes	225

The coding of the total of nine semistructured conversational interviews conducted with five volunteers did not take long to reach data saturation. The themes revealed in the coding passes were consistent. I performed coding in three passes using coding techniques that concentrated on literal meaning and effects felt by the subject—in vivo coding, process coding, and values coding. Interviews coding was by hand, using Microsoft Excel to organize data

I grouped the accumulated codes according to literal content and sorted them by the number of times they were mentioned. Beginning with the most mentioned codes, I looked for systemic similarities to link codes and produce themes and then mined the interview transcripts and researcher recollection notes for quotes that illustrated how the themes were demonstrated in the CI process and the leadership retreat the following month.

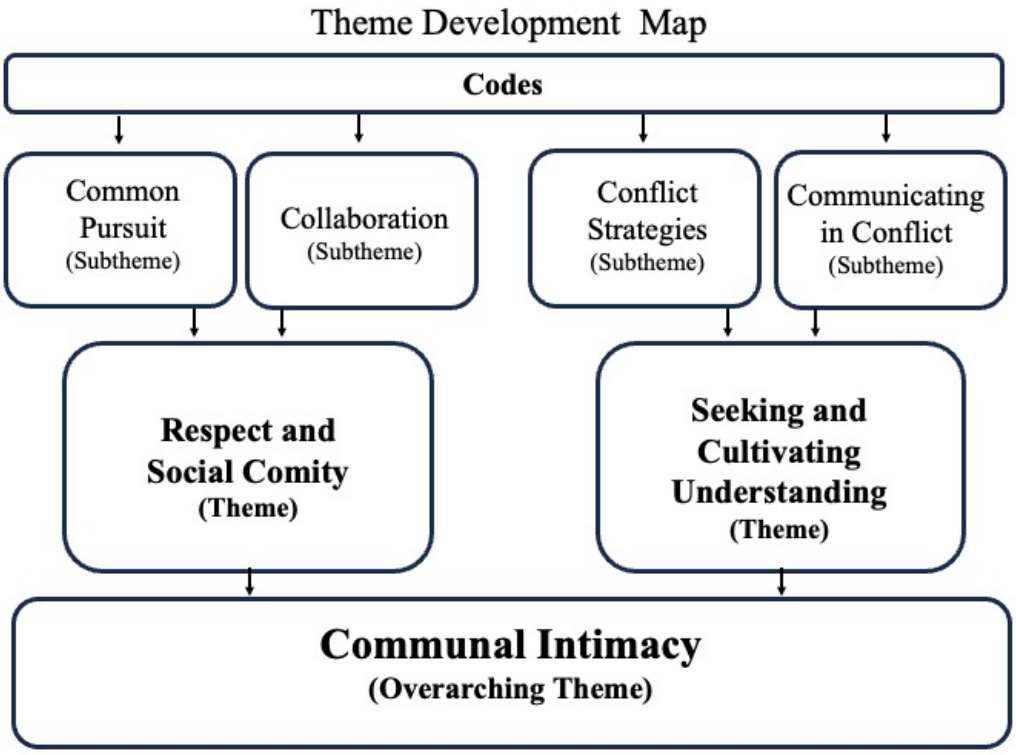
Themes

In qualitative research, themes and subthemes are developed as the researcher discerns clusters of codes that relate to one another considering the research questions (Braun & Clarke, 2022). Yin (2009) described case studies as narratives of real-life events. Stake (2008) contended that the case is a system presented as a narrative or series of narratives. A systemic analysis reveals coherence, patterns, and sequences (Checkland, 1999). Thus, I chose to approach the thematic study by viewing the case as a whole system and then collecting themes and nested subthemes as they were revealed through a detailed systemic exploration of the codes found in the narrative. After establishing the general themes of *Respect and Social Comity* and *Seeking and Cultivating Understanding* and their associated sub-themes, I used Saldaña's (2021) codeweaving technique to revisit the thematic material and uncover and articulate an overarching theme that

harmonized with the established narrative, the theme of *Communal Intimacy* (see Figure 7). Following the discussion of communal intimacy, each theme is explained, followed by a discussion of its connections to each of the research questions and its associated subthemes.

Figure 7

Collaborative Inquiry Theme Map



Note. Created by the researcher.

Overarching Theme: Communal Intimacy

The group's stated desire to connect on a personal basis by deliberately pursuing a respectful understanding of one another indicates a desire for interconnectedness and interdependence that goes deeper than simple group membership. Per their responses, most participants felt a desire to connect with others in a way that would build an inclusive social atmosphere based upon a multitude of minor dyadic connections that would lead to greater community cohesiveness. The two themes that inform communal intimacy are respect and

social comity as attitudes participants wanted to bring to the community and seeking and cultivating understanding as the instantiation of those attitudes.

Theme 1: Respect and Social Comity

The first theme that emerged from data analysis was that of respect coupled with social comity, with common pursuit and collaboration as subthemes (see Figure 8). The participants expressed a desire for respect as a social phenomenon, stressing the importance of slowing down to listen to what others were saying until they reached full understanding while demonstrating a willingness to respect the fellowship by cooperating with institutional processes. Social comity functioned as an operational aspect of respect when respondents articulated a desire to make room for personal differences rather than simply tolerate them. The group carried the concept of respect and social comity into various applications that were manifest in the nested subthemes, demonstrating how the experience of collaborating in a common pursuit affected the development of the cohort as a CoP (RQ1).

Figure 8

Respect and Social Comity: Sub-Themes and Codes

Theme: Respect and Social Comity	
Comity Acknowledge Strong Personalities Enjoy the Shared Experience Assume Positive Intentions and Goodwill Validation of Persons Compromise and Negotiation Finding Similarities Balancing Personal and Group Expectations	
Subtheme: Common Pursuit	**Subtheme: Collaboration**
Commitment to Common Goals: A Common Mission Reflective Practice / Curiosity Cooperation Building Relationships Unity/Bonding Challenging Each Other and Self Professional Development	Collaboration in Problem Solving VB Statement Influence Commitment to Values Trust in the Process CI Process Time Constraints Respect Observation & Participation (Motivating Introverts) Problem Solving
Initial Confusion (Process) *From Chaos to Order (Process)* *Making and Implementing Decisions (Process)* *"The CI Worked" (Process)*	

Note. Process codes indicate participants' growth in understanding of how a CI works.

The expectation-gathering portion of the CI was dominated by cordial recognition of personal differences and behaviors that illustrated the desire for respect for the individual and their life circumstances. As the CI unfolded, the participants became aware of various life experiences present and their need to both listen carefully and explain their positions fully with an attitude of patience. This realization contributed to the meanings individuals derived from using the CI to develop the VB statement (RQ2) and enriched their experience by broadening their understanding of how others communicate and receive communication (RQ3). "Peter," in Interview 2, stated,

> I think that everybody kind of realized that they all have a different perspective. I think everyone can agree on that, that they were like, Oh, everybody thinks so differently, right. That was … just kind of what I observed myself is what I … heard from them, but maybe that … that they're just realization like, 'Oh, hey, these people are different from me and [my] mentality and such. Maybe I should kind of make myself easier to understand or clarify more on my meeting, whatever I'm trying to say whatever my … communication is trying to be.' So I felt like the communication got better at the retreat. And that may be a reflection of … that outcome that happened after the collaborative inquiry experience.

"Brooklyn," in Interview 2, noted, "I think the influence is that we have to take other people's thoughts, opinions in too and we have to understand it and we also have to take into consideration … other people's perspectives."

Respondents provided several examples of the practical application of respect reflected in negotiation through conversation, clarifying meanings and intentions without rancor in a spirit of collaboration. Their conversations were focused on building rather than debating (RQ1). "Brooklyn," in Interview 1, mentioned,

> So if we didn't agree with something, let's say we were saying something, and the other team member didn't agree with it. We came up with a word that we can all be comfortable with. For example, we were trying to say respect, I said, 'respect.' And then someone else said, 'honesty' and I was

> like, Well, I feel like if you respect the person, you're honest, right? So we came up with let's just stick with respect because not only is it broad, but it's also personal and it's specific too. So my experience was it was well taken care of in our group.

Although the value of respect was aspirational, the practice of respect during the CI was not unalloyed. Interactions in small group work were cordial across most of the groups, with at least one exception. In Interview 1, one of the introverted participants, "Bonnie," felt pressure to change the wording of their submission.

> I really felt like I had to push for what my personal contribution was. I really had to push that through and they didn't really want to write it down, which was interesting. They were trying to transform it into something different rather than just like, "Just write what I'm saying", you know, so that was interesting to me. That I just wanted them to write down my statements and they really wanted to like transform it into something else.

Despite this one example of a small group behaving in a manner akin to bullying, the cohort's generally expressed desires for behavior indicated the broader community goal of reaching agreement through respect and social comity, providing insight into how using the CI to develop the VB statement contributed to the formation of the group as a CoP (RQ1) as well as the process of growing a corporate culture (RQ4). "Brooklyn," in Interview 1, said, "We just came up with like, Okay, is it covered with you? Yes; it's covered with you? Yes." In addition, "Bonnie," in Interview 2, stated, "You know, I mean, we had we all came together and agreed, and I think, you know, we agreed what that statement was going to be and we really wanted to reflect that in our work."

The creation of the VB statement gave the group a sense of shared vocabulary that provided them with defined cultural norms, establishing level ground for constructive conflict as a CoP (RQ1) and contributing to the eventual formation of the group's corporate culture (RQ4). Members could confront one another using the tool of the VB statement rather than presenting it as a personal grievance. For example, "Annabelle," in Interview 2, stated,

> I think that it holds people accountable. You know, it's as we agreed. Whether some of us didn't completely agree with everything that was on there, but we allowed it. That's what became our statement, right? So it's gonna hold people accountable. To 'Hey, wait a minute, you agreed to this.'

During the CoP's introductory stage, it became clear the new community comprised various individuals who appeared eager to work together but had not yet gained the ability to understand one another and give each other the room needed for self-expression and self-fulfillment. The CI afforded them the ability to listen to one another in a nonthreatening environment and embrace the commonalities that defined the process of a group of individuals developing into a CoP (RQ1). "Annabelle," in Interview 1, said, "We definitely got to know everybody and kind of where they were coming from … We all may be there for the same reasons but we all are definitely from different backgrounds."

The idea of recognizing and appreciating differences was readily embraced by some, but others needed some encouragement to mingle within the newly forming CoP. Mixing up the assigned seating and small workgroups facilitated this process, supporting the individual participant's experiences (RQ2). "Coach," stated,

> You know, what I liked about it the most is that when you split us up into groups, I noticed that we were always split up into different groups, and there were different people in different groups as we were doing that whole, you know, experience. I liked that. It took me out of my comfort zone. I would have easily just stuck around with [one person] all day and we would have just kept answering our own questions. But instead, you challenged us to listen to other perspectives and other types of people that maybe we would never even approach or even try to listen to.

Respect and Social Comity and RQ1. How do participants think the experience of using CI to establish the VB statement affected the development of the cohort as a CoP? Social comity is a phenomenon that is noticed more by its absence than its presence. The conversational compromises that supported the decision-making in one small group compiling VB suggestions were also made in

11 other small groups and almost completely relocated into the larger group conversation that followed. The spirit and practice of social comity continued into times of conflict, as the group tended toward embracing the clash of ideas rather than personalities.

Respect and Social Comity and RQ2. What meaning did the individual participants derive from using CI to develop the VB statement? At least two of the interviewees saw the value in bringing lessons from the experience back to their workplace communities. One of them, "Peter," become more appreciative in Interview 1: "Oh, I think I definitely had a new perspective at work. Now, considering that I've seen such spirited conversation … I feel like I have a greater appreciation for communication … I see the effort." Another, "Bonnie," in Interview 2, anticipated practical application among staff: "I think about it personally when I'm going into things and what that could do for our team of managers at work and what it could do for, you know, the people that I supervise."

The CI process provided a venue for building an understanding of one another that can result in the multitude of personal ties that make up communal intimacy, no matter how weak. "Bonnie," in Interview 2, stated, "It's gonna build some lasting relationships and improve and enhance ones that I already had." Also in Interview 2, "Brooklyn," mentioned, "I think it helped me to know where everybody stands…we found a common ground to stand on," Whereas "Peter noted, "I was able to kind of see a reflection of myself in each of the people there…I do see myself trying to reach out to the other people in the cohort."

Respect and Social Comity and RQ3. How did using CI to develop the VB statement influence the individual participant's experience? In RQ2, the theme of seeking and cultivating understanding and its subthemes of conflict strategies and communicating in conflict predominated. RQ3 differs in that it emphasizes experience over meaning. The theme of respect and social comity and its subthemes of common pursuit and collaboration were more pronounced in RQ3.

The repetition of participant votes for codes such as "NOT Condescending," "Assume Positive Intent," "Appreciate each other's differences" "Be true to each other," "Seek to understand. Be slow to speak and quick to listen," and "Ensure

everyone has Value!" demonstrated both the value they placed on the theme and the determination they expressed that the CoP would be a place of empathy and consideration for one another. In Interview 2, "Brooklyn" stated,

> I think the influence is that we have to take other people's thoughts, opinions into and we have to understand it and we also … had to look at other people's perspectives … when I heard them incorporate the value statement as to why this is important to them, in addition to the values that we had the first day, then I was like, Oh, this is why this value statement is important.

It appeared the majority of the group was very interested in getting to know one another and finding ways to connect as individuals. "Coach," noted, "My personal outcome was that I ended up finding out people's true self and I think that as we met, as we keep continuing meeting in this cohort, more of that will come out because of the value and the core that came out of [the CI]." Such interest was manifest in repeated CI codes such as "Respect differences of opinion," "Encourage everyone to engage," "Listen with the intent to understand," and "Putting yourself in other people's shoes."

The desire for familiarity was not limited to social contacts. The participants recognized the practical application of familiarity when planning and executing tasks. In Interview 1, "Annabelle" stated, "We definitely got to know everybody and kind of where they were coming from. Breaking down into small groups got information quicker than it would have if it would have been a large group."

Interviewees uniformly expressed their discovery of the importance of discerning the motivation and/or the historical foundation behind other community members' opinions and proposals. After that discovery, they adopted a more patient and empathetic approach to the communication process. "Brooklyn," in Interview 1, noted,

> I actually understood people more because when they gave me examples of why they were saying what they were saying, what answer they were giving, and the background to it. You understood their story more and you

> understand why they act the way they do or they don't do it they do like in our group.

A notable side effect of the empathetic communication process was instances of greater introspection and self-discovery. For one participant, "Peter," in Interview 1, witnessing the personal challenges other CoP members communicated resulted in new self-knowledge and the opportunity to challenge himself:

> I see the effort that everyone has given in their own lives … that's kind of influenced me to take on greater tasks. I've actually been doing a bit more… trying new avenues, and seeing some of the people even at the Alumni mixer, was inspirational to me to pursue a higher level of education. And so I'm actually doing the master's program at UOP. I'm going to be applying for that for next fall just because I feel that I'm inspired by these people and to see the level of respect given the differences in communication even it's it's just inspiring I'm, I'm ready for the next level, because of this.

During the second interview (after the retreat), the same participant reflected further on gaining self-knowledge after observing an emotional outburst by another member:

> So, seeing that [misunderstandings in the group process] was frustrating, because it made me feel defensive about myself, to the point where I was like, Oh, I would, I would react the same way if I was, you know, not listening and in a way, right so I think that was frustrating, interesting reflections of myself.

The participants consistently placed a high value on mutual respect as manifested in active listening and assuming good intentions. Their reflections on their positive experiences of group creation of the VB statement as a social compact, finding or creating common ground, and encouraging one another to engage as individuals and as members of the CoP indicate a movement toward both personal growth in understanding others and the overarching theme of communal intimacy.

Respect and Social Comity and RQ4. What, if any, value did the shared experience of belonging to a CoP and using CI to develop the VB statement contribute to the formation of the group's corporate culture? When asked about the formation of culture, the participants uniformly returned to the touchstones of inclusion and accepting one another without judgment. They saw success in establishing an atmosphere where the spirit of the CoP could grow. For example, In Interview 2, "Annabelle" expressed, "I think that it validated everybody that was in the group and let everybody know that we're there for the general interest. And sometimes people really do need validation to feel that they are a part of the group."

The tasks their answers originally focused on were those associated with the success they experienced in the building of the community. They were vaguer in their success at the establishment of a group culture, adopting a "wait and see" attitude. In Interview 1, "Brooklyn" stated,

> Oh, I think we got to know each other better, I think, because there were quite a few tension times of moments, but we got to know each other better…we had to come to a conclusion and we had to merge the different words and what we were putting together into one… So we got to know each other more. And we had to respect what each other were saying more. Okay, as a group, I think that we did good.
>
> Similarly, "Peter" mentioned in Interview 1,I can't really give a specific statement to how that's really influenced the group because I think, right now we're just problem solving. We're getting more cohesion from that, that you know, the problem solving with with the, the exercises that we've done so far, so it's hard to really give value to either one. Right now, but I think this is just a natural cohesion of the group. But it'll be interesting to see how we develop … and seeing how we confront new challenges for group communication. I think that'll be when I can answer that question better.

Although the theme of respect and social comity is aspirational in nature (much like aspirational values), the subthemes of common pursuit and collaboration are nested

within it and, similar to core values, provide for a practical application of effort toward fulfilling the aspirations.

Subtheme: Common Pursuit. From their beginning, CoPs have been built upon common interests and a common purpose/domain (Wenger et al., 2002). Although cohort members provided various reasons for enrolling in Leadership Stockton during the orientation session, a systemic review of the data revealed a common theme/goal of service to the community and service to self. That pursuit was confirmed in the participants' view of the CI as a birthing place for the CoP (RQ1) and an incubator for what would become its culture (RQ4). In Interview 1, "Bonnie" indicated,

> [W]e really felt that like, we were trying to go back to what was…you know, why are we all here? You know, I mean … We're all here to make Stockton a better place, you know, and to help the community and build relationships. So I think just going back to that value statement, and why we're all here.

The common goal and cooperative method of pursuit became a touchstone for the group, especially when conflict arose, showing a commitment to both personal development (RQ2) and the development of the CoP (RQ1). In Interview 1, "Peter" noted, "I still felt at its core that these people wanted to respect and communicate clearly, right? … that was still the clear common goal whether or not emotions got tangled into it.

Although giving every individual a voice was a high priority, the nature of CI is such that ideas must be triaged and those that do not significantly contribute to the collective goals of the group are set aside. Some of the participants were unhappy that their ideas were not enthusiastically embraced by the rest of the community. For example, "Brooklyn," said the following in Interview 1:

> Sometimes words are very personal and powerful. So if we don't see our word with importance from other people, we get offended by that. And I learned that we can't be offended because people come from different places, right? And different things are important to them.

Subtheme: Collaboration. I differentiated collaboration from common pursuit to emphasize the dynamics between methods and goals. Although the community voiced agreement on their pursuit of the greater goal with little conflict, achieving consensus on the operational aspects of collaboration proved to be a more complicated challenge that took time and further effort to embrace. The theme of collaboration addresses the meaning individuals derived from the CI (RQ2), the development of the cohort as a CoP (RQ1), and the formation of the group's corporate culture (RQ4). In Interview 1, "Brooklyn" stated,

> A lot of people who didn't understand what the collaborative inquiry is, it literally is in the name. It is collaborating with each other. You can't have this pain or this anger because your word or sentences weren't being put up there.

The VB statement was the product of the CI, but the experience of the CI was also intended to help establish and strengthen the group as a CoP (RQ1). The experience was not proposed as a panacea, but as a launching point for the CoP formation process that would provide touchstones for further communal maturity (RQ4). In Interview 2, "Annabelle" stated as follows:

> Had we not done that and gone into a group trying to develop a group project … had we not done that? I think it probably would have been worse than it was, you know, so I think that it did give the majority of the group really that, that base of like, okay, I really do want this to be a positive experience … I think things could have gone sideways a lot earlier at the retreat had we not done something like that, with people having that in the back of their minds.

Members of the group mentioned the air of collaboration they took to the small groups that formed to create project proposals, bringing their commitment to the VB statement and acknowledgment of collaborative goals to the retreat (RQ1 and RQ4). "Bonnie," in Interview 2 stated,

> I think the majority of the group going into the retreat, took it to heart, I think they, you know, they tried to implement what we all agreed upon … I

> think that we get things accomplished a lot better when you maybe do take a step back, observe, and then see what needs to get done.

"Coach" also noted,

> The group came together. I mean, I know that there's a lot more events that we have to do, where we're going to probably come even more together or maybe create these bonds and friendship, but I think at that point, the group understood that we have to be together front on this. It can't be an individual or it can't be a competition. It has to be all 32 people going in the right direction, doing the right thing. So that's what I believe we got out of it after that experience.

An advantage of looking at the theme and subtheme narratives from a systems perspective is a greater awareness of how minor thematic differences can affect one another systemically, whether through reinforcement, balancing, or destabilizing. In this case, common pursuit and collaboration tended to reinforce one another in a loop as the community embraced collaboration as the vehicle to accomplish their common pursuit. The quest for understanding emerged as an exercise in dynamic tension: a balancing act between conflict, communication, and commitment to the communal purpose, which is an indicator of a CoP moving toward a well-developed culture (RQ4).

Theme Two: Seeking and Cultivating Understanding

The second major theme discovered in data analysis was that of seeking and cultivating understanding (see Figure 9). The two themes are related in that, whereas the theme of respect and social comity addresses the attitudes associated with the CI and VB statement, seeking and cultivating understanding addresses the operational aspect of using the CI to create and apply VB.

Figure 9

Seeking and Cultivating Understanding: Subthemes and Codes

Theme: Seeking and Cultivating Understanding	
Personal Growth / Introspection	
Gaining Familiarity With Each Other	
Being Understood	
Communication in General	
Validation of Persons	
Finding Similarities	
"Giving Up The Spotlight" "Taking the Back Seat"	
Subtheme: Conflict Strategies	**Subtheme: Communication in Conflict**
Considering Other Perspectives / Empathy	Addressing Miscommunication / Seeking Clarity
Bridging Differences / Engagement	Dissatisfaction / Negativity
Accountability	Extroverts Dominating Conversations
Observation & Participation (Motivating Introverts)	Assuming Positive Intentions and Goodwill
Unity/Bonding	*"Taking sides" (Challenge)*
Compromise and Negotiation	*Non-Productive Conflict Argumentation (Challenge)*
Productive Conflict	*Avoidance / Withdrawal (Challenge)*
Refocusing by Revisiting Original Purposes	*Larger Group Dynamics vs Small Group Dynamics (Challenge)*
Problem Solving	*Resistance/Bullying (Challenge)*

Note. Challenge codes indicate subjects participants determined to be threatening to organizational well-being and a threat to a successful CI.

Throughout the CI, a major facilitation challenge was to sort conflicts into those that presented true differentiation from one another and those that augmented or positively challenged one another. The facilitator's task was to foster group discernment regarding which conflicts were divisive and needing resolution versus those which appeared to be conflicts but instead were examples of dynamic constructive tension that had the potential to lead to a deeper understanding. As cohort members explored these issues, they found the motivation to seek understanding about how others think (RQ2, RQ3, and RQ4). "Coach" stated,

> It brought it out discussion, and it brought out these points of, okay, let me understand what you mean by tolerance. Let me understand … so we kind of had to dive into what people were thinking and that I think, is like the drill-down effect of that of that process, right? It takes you from this wide

> variety or this opinion that you have, and now it's like, Why? Why do you feel like that? Let's drill down to it.

The cultivation of understanding established a foundation for productive conflict as the community pursued their agreed-upon goals. Figure 9 depicts the codes that informed the theme of seeking and cultivating understanding through the subthemes of conflict strategies and communication in conflict. From time to time, the community reminded itself of the behavior statement of "We work through conflict to resolution and repair" (Leadership Stockton Values and Behaviors Statement) as their primary device for handling conflict.

Seeking and Cultivating Understanding and RQ1. How do participants think the experience of using CI to establish the VB statement affected the development of the cohort as a CoP? By the conclusion of the retreat, I observed community members engaging in conversation and problem-solving with ease, in particular during the process of moving from the proposed and accepted project to the generation of a more detailed project plan. They self-organized a process, set up committees, and planned tasks quickly and efficiently. Such work might be expected of professionals, but their negotiation of tasks and roles reflected familiarity with one another and the alignment and engagement of a CoP with a formal VB statement rather than the actions of a mere collection of accomplished individuals. In Interview 2, "Brooklyn" noted,

> When I'm in a group, and I'm working, and they're telling you the process, it helps because again, there's people [that] have their own thoughts about efficacy, about work habits about how things should work, but … it helps me to know what I would have expected of me instead of me just go off and do my own thing and still get into that same goal. I have this right path that I can take.

Seeking and Cultivating Understanding and RQ2. What meaning did the individual participants derive from using CI to develop the VB statement? The participants first wanted to focus on getting to know one another and gaining knowledge about the backgrounds, vocabulary, and experiences of others and grasping what others shared. For example, "Bonnie," in Interview 2, stated,

> I think it gave everybody a really good base to think about how to work together … I think about it personally when I'm going into things and what that could do for our team of managers at work and what it could do for, you know, the people that I supervise, even though they're not necessarily leading other staff, they are social workers, you know, so they have to be a leader and a role model for the people that they're serving.

Beginning the CI with small groups assigned to pursue the focused activity had two objectives: (a) to generate subject matter for larger group discussion and (b) to force conversation and participation within the small group. "Coach" noted, "I think it really kind of, like you said, broke the ice. And we were able to look each other and say, Oh, that's a similar person that thinks similar to me."

There were wide swaths of agreement among the small group results mixed with a few outlier ideas that would provide grist for debate and to further populate a VB statement unique to the cohort. In Interview 1, "Brooklyn" stated, "It worked, because at the end, we discovered that although we were separated in groups, we all came to the same idea of what we wanted, right when we wanted … and it works."

Although the VB statement was written to be a tool for the CoP, it also inspired individuals to practice self-understanding. The participants mentioned that they would post the VB statement on bathroom mirrors or on cubicle walls as a reminder to revisit them when they found themselves confronting personal challenges. "Coach" noted, "I can go back to those words and values and go, 'Hey, am I really being true to what our group has set out to do? Or am I just being selfish?" The participants also learned personal behavioral lessons through the CI experience. In Interview 2, "Anabelle" said, "Compromise. I think it gave me room for compromise," "Bonnie" noted, "Maybe I do need to speak up more in larger groups," whereas "Brooklyn remarked, "It affected me because now I had to take into consideration other people's values, not just mine."

Seeking and Cultivating Understanding and RQ3. How did using CI to develop the VB statement influence the individual participant's experience? In RQ2, the theme of seeking and cultivating understanding and its subthemes of conflict strategies and communicating in conflict predominated. RQ3 differs in that

it emphasizes experience over meaning and relationship over accomplishment. There was little if any coding that tied this theme or its subthemes to RQ3—all responses to interview questions focused on respect and social comity and their subthemes.

Seeking and Cultivating Understanding and RQ4. What, if any, value did the shared experience of belonging to a CoP and using CI to develop the VB statement contribute to the formation of the group's corporate culture? The cohort repeatedly demonstrated a willingness to listen to one another until they reached full understanding. The discussions sometimes became rancorous, but the participants repeatedly stepped back from intense argument to reapproach with more conciliatory tones. "Coach" noted,

> What happened with the cohort brought out discussion, and it brought out these points of, okay, let me understand what you mean by tolerance. Let me understand … so we kind of had to dive into what people were thinking and that I think, is like the drill-down effect of that process.

The CI introduced some conflict into the CoP during its earliest hours of formation, but the retreat provided the crucible for the clash of four different service proposals. The afternoon of Day 1 was spent with the teams offering their project pitches and answering questions about their proposals. The later afternoon and evening was provided as a social time, but members were encouraged to explore ideas of concession and compromise with facilitated formal negotiations to be held the following morning. In Interview 1, "Brooklyn" stated,

> I think the retreat was eye-opening, I think the retreat, I think, because it was a real life. You had to use that collaborative inquiry in real life in real time. So I think, I think they did take it seriously. I don't think people understood it as much until they went through that process. I think that we just thought it was just, it was just a formality. Right? And then when we had to actually put that into practice I think it was taken seriously by most if not all, in the group.

The evening event was a gathering around an amphitheater fire pit, with marshmallow forks, s'mores, adult beverages, and music. Members sang, danced,

and talked, providing an opportunity to know one another in a different modality than the structured CI. Still, the next morning was filled with the clash of proposals and sometimes intense negotiations. In Interview 2, "Peter" remarked, "I felt like the communication got better at the retreat. And that may be a reflection of outcome that happened after the collaborative inquiry experience."

Subtheme: Conflict Strategies. Leadership Stockton's program qualities appeal to those currently in or aspiring to organizational and/or civic leadership positions (Leadership Stockton, n.d.). Cohort members brought diverse communication and problem-solving abilities to the newly forming CoP. Both individuals and the collective had to adapt these dynamics to a novel setting or discard them as needed (RQ1 and RQ3). "Coach" noted,

> It brings out the truth in people, but the way that what I saw was, you started seeing the people that were going to be "alright, let's just go with the flow." And then you had the people that were like, "No, I disagree with that." And so what happened with the cohort it brought it out discussion, and it brought out these points of, okay, let me understand what you mean by tolerance.

I observed most as being willing to engage in productive problem-solving as a clash of ideas, but disagreements sometimes took on a personal tone. The VB statement provided a metaphorical cushion for personal conflicts (RQ3 and RQ4). "Bonnie," in Interview 2, observed,

> And even though there was some discontent and arguments at the retreat, I think it [the VB statement] gave everybody a really good base to think about how to work together. What our mission really was, and I think the majority of the group was really invested in it.

Similarly, "Peter," in Interview 2, noted,

> How far could I, you know, push against an idea without upsetting somebody to the point where they become nonparticipants. Right? They, they would basically withdraw from the conversation or such. So and that's really what it was, after that. The [CI] was to just try and better communicate, and if there's any kind of miscommunication, clarify.

Individuals brought various personal strategies to handle conflict, but the group as a whole pursued communication as their primary problem-solving tool throughout both the CI and the negotiations held at the retreat. The VB statement was not the only communication aid. Although the retreat included additional goal-setting exercises, team-building games, and leadership training sessions, all with the intent of building the CoP, the participants recognized the importance of conversation and consistently applied the principles of the VB statement when dealing with conflict (RQ1).

Subtheme: Communicating in Conflict. The cohort spent the morning of the CI playing co-operative team-building games on a ropes course with a team-building facilitator, followed by an orientation on researching and creating their project presentations. After a working lunch, the formal CI began. In Interview 1, "Bonnie" remarked,

> You could tell that you know, that maybe people were a bit more like friendly and jovial during the outside, you know, thing that we were doing before, like the morning part of our session, and then people got really tense and you know, it started to get a little aggressive at times through that.

The atmosphere was relaxed during the CI small group work, but when the group began sorting through the lists of behaviors and members were faced with consolidating definitions and triaging through debate with the intent of setting some people's preferences aside, the atmosphere in the room took on an air of tension. "Coach," noted,

> The cohort, I believe, realized that it wasn't going to be easy. (Laughs) It was I think, after that whole conversation, I think there was a lot of whispering and a lot of, "hey, can you believe he said that" or "why did she get upset?" or you know, and I think at that point, we were like, okay, yeah, we're in a group of leaders here. And we're not all gonna agree on the same thing, but there's a way to get through it.

Interviewees agreed about the importance of reflection and communication as primary tools for conflict resolution, especially when emotionality was involved (RQ2). For example, "Peter," in Interview 2, noted,

> If at one point anybody ever says, “Oh, what do you mean by that?” Or it gets offended in some way I'm like, “Hold on. Wait, let's back up. Let me rephrase it then because I don't think what I was trying to say came off correctly.

Similarly, “Coach” observed,

> It really makes us look back and it makes me look back to if I disagree with someone, and maybe it's a major disagreement, and I'm just upset. I can go back to those words and those values and go, “Hey, am I really being true to what our group has set out to do? Or am I just being selfish?” Right, so… it's a way of looking back in and refocusing yourself and that's the way I look at it.

Interviewees brought up an emotional outburst at the retreat as an example of the importance of de-escalating emotions to foster good communication (RQ1). In Interview 2, “Brooklyn” noted,

> I think that it was because there was so much passion, and so much frustration in the room. And it was and it was really frustrating because people were not listening. So I feel like you have to also listen with your ears [and] with your mind too – like they're weren't listening with their mind. They were just hearing what they heard, heard half of it, their response half of it and didn't hear the whole thing. That was frustrating.

Similarly, “Peter,” in Interview 2, observed,

> I saw the anger and such or the retaliation or, or just, just the responses where it was just like, “I'm not, I'm not trying to understand you because you're not understanding me” rather than saying, “Okay, let me try to understand you and then help you understand what I'm trying to say” right?

Summary

The aspirational goal of any CI should be to reach a place where participants are satisfied with authentic partnerships, alignment of purpose, and the ability to engage in honest dialogue (Shani & Coghlan, 2021). Although the stated purpose of the Leadership Stockton CI was to establish a VB statement, the process

was also intended to support the establishment of a CoP. In this chapter, I presented the qualitative data gathered over the course of the first 6 weeks of the cohort's existence as expressed in the overarching theme of communal intimacy, based on cohort members' desires to establish dyadic relationships grounded in mutual respect and understanding with fellow community members.

Chapter 5 – Discussion

The research study documented in earlier chapters addressed the effects of a CI that created a VB statement. Leadership Stockton is a 10-month CoP sponsored by the Greater Stockton (California) Chamber of Commerce with the intent of building local community leadership by exposing members to various facets of the city and county. The group's first three sessions encompass getting to know one another and choosing a group service project. The first session is a two-hour orientation session that includes a whiteboard exercise to introduce each member's goals for their time in the program. The second session is a one-day workshop that includes a CI conducted to articulate a group VB statement. The third session is held a month later as a two-day leadership retreat to choose one of four group service projects proposed from within the group. The purpose of this study was to examine the experiences of professionals participating in a 10-month civic leadership education CoP as they used CI to establish a VB statement.

Research into creating business models using CI for building CoPs and understanding the co-creation process of small group culture practicing shared leadership is lacking. The application of CI to discover inner-life issues such as values, social progress, self-knowledge and reconciliation has been shown to be essential to the smooth operation of a small CoP (Shani & Coghlan, 2021). Other essentials for newly founded CoPs to thrive are recognized organizational values and culture, congruence between values and behaviors, and clearly articulated values and the behaviors necessary to uphold them.

In Chapter 4, I described the setting and the execution of the CI via a chronology of events, including gathering initial results from small groups, triaging to establish the behaviors most desired by the community, and editing the lists into manageable sizes with appropriate labels. I also described the challenges of managing those who would dominate the conversation while encouraging participation from those who had opinions and comments but declined to fully participate. Chapter 4 also included a discussion of my efforts to manage conflict toward productivity and problem-solving, sorting conflicts into those that were

divisive and needed resolution from those that appeared to be conflicts but instead were examples of dynamic constructive tension that had the potential to bring about deeper understanding for the group.

A systemic contextual data analysis revealed two main themes: (a) Respect and Social Comity with sub-themes of Common Pursuit and Collaboration and (b) Seeking and Cultivating Understanding with the subthemes of Conflict Strategies and Communication in Conflict. The two main themes harmonized in a grand theme of Communal Intimacy, which I liken to "social velcro." In this final chapter, I further discuss the findings in context of the RQs, present theoretical and practical implications for CI, VB, CoP and the practice of shared leadership, the limitations of the study, and recommendations for future research.

Findings

Research Question 1

RQ1 was, "How do participants think the experience of using CI to establish the VB statement affected the development of the cohort as a CoP?" The use of a CI to establish a VB statement began as an effort to make the creation and development of the cohort as a CoP more intentional and less random. Before using the CI to generate VB statements, previous cohorts were established as communities through team-building games and social mixers. The Leadership Stockton VB statement CI was instituted to move the social growth process beyond team building and accelerate communal development. Participants were given a general idea of what to expect from the experience but were not provided with process details. During early conversations, discussions, and the orientation session, they were briefed on the nature of CoPs and the program's intentions to build their CoP based on an articulation of common concerns, agreed upon mores, and a common mission/purpose (Comeau, 2019; Farnsworth et al., 2016; Wenger et al., 2002). They received a general description of the CI process, emphasizing that it is a creative act for the group. However, the emphasis remained on the outcome of the VB statement rather than burden them with the idea that the process was also intended to be a group-

shared experience in uncovering each other's communication modes and learning effective conflict resolution techniques (Oakes et al., 1986). In the spirit of Schrödinger and his cat, the intention was for them to reflect upon the experience afterward rather than have the product of the VB statement marred by trying to keep track of the process while they moved through it (Trimmer, 1980). From a systemic leadership standpoint, the intention was to control the temperature, regulating the intensity of the experience to keep them from being overwhelmed in pursuit of the product (Heifetz & Linsky, 2002).

In the interviews following the CI, respondents were in general agreement that the exercise helped the cohort orient itself toward becoming a community and that the establishment of values as both practical and aspirational goals was helped by the group's provision of behavior examples as definitions. The instantiation aspect of the VB statement proved to be key to the resolution of various conflicts at the retreat when the behaviors were used as links to allied or parallel behaviors to support and refute arguments, confirming the value of translating value labels into behavioral expectations—and, ultimately, cultural mores (Li et al., 2009; Maio, 2010; Perkmann & Spicer, 2014).

CIs for large groups such as this must be moderated to ensure the experience contributes to the well-being of individual participants and ultimately the entire group. The participants took note of the extroverted/aggressive and introverted/passive natures of several members. Such a phenomenon underscores the importance of shared leadership in both the CoP and the CI process. Participants are obliged to address the issue of domination, given the need to move the dialogue toward acts of co-creation and transformative change as opposed to allowing the loudest voices to control the conversation (Freire, 2000). The major challenge this issue presented was found in the vigilance necessary to monitor both the extroverts and the introverts, but a more subtle dynamic present was that of the group ensuring the CoP would develop into a healthy shared leadership paradigm with common goals and a unified collective voice rather than one dominated by a few individuals (Geib & Boenigk, 2022; Klasmeier & Rowold, 2022).

Both the participants and my observations revealed a tendency of a select few members of the group to be eager to take offense, a dynamic that lessened as cohort members learned active listening and the CoP matured. The sensitivities were evident during the orientation and early hours of the CI day. At a reception for the group that evening, a group of three complained to the program coordinator that the facilitation was "dismissive and off-putting." Such resistance is not surprising because the CI dialogical model of subject discovery challenges preexisting paradigms to create new models of thought, which can be threatening (Bonebright, 2010). At the conclusion of the retreat, the complainants expressed appreciation for the process, a manifestation of Wenger-Trayner's (1999) triad of belonging—engagement, imagination, and alignment—relational aspects of CoPs that grow with time and cultivation and allow community members to engage without triggering hostility or undue sensitivities.

The interviewees described the CI process as "chaotic" and used the terms "bumping heads" and "taking sides" throughout the CI. They also described the final product as providing a "common goal" or "common mission" and the group overall as having had a "positive experience." At times, the participants voiced concern about the "combativeness" of the process and "Coach" laughed when he mentioned, "The cohort, I believe, realized that it wasn't going to be easy." There is always a certain amount of tension present in the meaning making phase of CI (Bray et al., 2000). Participants must be committed to steering conflict into the clash of ideas rather than the clash of personalities and maintain an air of comfort with the process. As such, one must develop the skills associated with active listening: listening to understand rather than respond, rephrasing statements to ensure full understanding has been achieved, reigning in one's emotions, and controlling the conversation so that all are heard and none is talked over or ignored (Gallo, 2024).

By the retreat (5 weeks after the CI), the cohort had had some time and further small group activity to reflect on the impact of the CI and the VB statement. The retreat was a venue designed for conflict in that there were four groups proposing service projects and only one would be chosen to be the

cohort's signature project. The participants expressed appreciation for the VB statement as an established set of "ground rules" for the competition and referred to the CI as having provided a place where individuals had the opportunity to understand one another's differences and perspectives in a cooperative setting rather than a competitive one. They credited the CI with providing a better sense of how to communicate with one another, both in giving and receiving information.

Researcher observations and the interviewees' responses indicated that the participants thought that using the CI to establish the VB statement supported the development of the CoP by:

- Providing a nonthreatening venue to get to know one another.
- Giving the group a moderated atmosphere to encounter perspectives outside of those with which they were most familiar.
- Presenting the opportunity for each individual in the group to have an equal voice in contributing to the creation of the VB as an original work.
- Beginning the building of social intimacy through the deliberate practice of active listening and social comity.

Research Question Two

RQ2 was, "What meaning did the individual participants derive from using CI to develop the VB statement?" Leadership Stockton is a community oriented educational program, so it is natural that participants would expect to learn about the community at large. CoPs are intentional communities, a collection of individuals whose decision to engage is an act of agency (Billett, 2013). The VB statement is designated to be a set of guidelines for how members of the organization relate to one another and the organization as a whole (Bourne & Jenkins, 2013). RQ2 addressed how the participants made personal meaning from the experience of the communal creation of those guidelines.

Research into the meaning found in co-creating the VB statement through CI through interviews and observance resulted in two related but distinctive themes: respect and social comity, and seeking and cultivating understanding.

Herzberg (1968) would refer to these themes as satisfiers: motivators that are internal in nature. Both themes emerged from codes and subthemes that tended toward personal behaviors in relationships and the effects of self-discovery during the CI, elements that ultimately influenced the development of the CoP and provided meaning to members.

The first step in the CI was for participants to listen to one another, asking questions and fully explaining their thoughts in small groups. Bray et al. (2000) suggested limiting CI groups to between five and 12 to guarantee all members would speak in the CI, but there were 32 people in the cohort. This large number presented the dilemma of ensuring all members got a chance to participate, as well as applying positive pressure to encourage those who preferred to avoid participation to join the conversation. To address this issue, I broke the cohort into random small groups. The groups were required to report back with contributions from every member. Most participants appreciated the small groups as intimate arenas where they could fully express themselves and listen to one another speak in detail, giving them the opportunity to expose and explain communication differences as they worked together.

The assignment for the small groups was to list behaviors they wanted to see demonstrated or avoided by all members of the cohort. Every individual was required to submit at least one behavior and the behaviors were written on single post-it notes to facilitate sorting. The participants commented that they appreciated the definitive statements; they either liked or disliked a behavior with certainty and no shades of gray and were able to discuss their reasoning with other members of the small group and, in turn, hear how others made their choices. This exercise was an example of reflective practice, focusing on introspection and self-examination, creating new meanings while exploring existing meanings (Burt et al., 2018; Shani & Coghlan, 2021).

Researcher observations and the interviewees' responses show that individual participants derived meaning from using CI to develop the VB statement in the following ways:

They were given the opportunity to:

- Practice self-discovery and discovery of others different from self.
- Listen to various worldviews and ask questions to achieve full understanding without being judged.
- Learn to work past communication differences in pursuit of an agreed upon common goal.
- Engage in a practical workplace exercise, watching human behavior unfold in group activity with what (for some) appeared to be a genuine bonding experience.
- Recognize and exercise personal agency in participating in a focused group activity.
- Discover the importance of honoring the values of others as well as self.
- Learn that offense is rarely intentional but frequently the result of misunderstanding one another.
- Experience surprise and fulfillment at being able to see a reflection of self in almost all the people there.

Research Question Three

RQ3 was, "How did using CI to develop the VB statement influence the individual participant's experience?" Interviewees focused on various experiences, from deciding how to respond to the expectations of others to the joy of group creativity, learning more about other community members and their expectations, and challenging themselves in their professional lives. Such experiences mirror aspects of Mezirow's (2003) instrumental, transformative, and communicative learning perspectives.

The participants provided reflections on their positive experiences of group creation of the VB statement as a social compact, finding or creating common ground, and encouraging one another to engage as individuals and as members of the CoP through listening in an empathetic manner. Such experiences indicate a movement toward both personal growth in understanding others and the overarching theme of communal intimacy. This transformational and creative dialogue in an atmosphere that instigated change rather than domination provided

inspiration for the formation of the CoP (Freire, 2000). Some found the creation of a new team and the shared experience of that new team creating the VB a fulfilling experience. This finding is not surprising, given that the construction of new meaning through mutual exploration and research is the central motivation for a CI (Bray et al., 2000). The majority of the group was very interested in not only knowing one another and finding ways to connect as individuals, one of the building blocks of creating a CoP, but also recognizing the practical application of familiarity when planning and executing tasks (Cluff, 2022; Lave & Wenger, 1991).

A notable side effect of the empathetic communication process included instances of greater introspection and self-discovery. For one participant, witnessing the personal challenges other CoP members communicated resulted in new self-knowledge and the opportunity to challenge himself, even to the point of deciding to enroll in a master's degree program. Researcher observations and the interviewees' responses indicated that using CI to develop the VB statement influenced the individual participants' experience in the following ways:

- Easing the uncertainty of belonging to a new community by taking part in the establishment of the group's identity and social structure (Hogg, 2012).
- Realizing personal growth in understanding others and practicing empathetic communication.
- Fulfillment in participating in the creation of a new CoP.
- Being challenged to new levels of self-knowledge and introspection.

Research Question Four

RQ4 was, "What, if any, value did the shared experience of belonging to a CoP and using CI to develop the VB statement contribute to the formation of the group's corporate culture?" The participants were uniformly positive in their comments about the utility and unifying themes associated with the CI that were related throughout the interviews, but, from time to time, they mentioned dissenting voices in the cohort. The dissenters were a minority and largely mentioned as asides during the interviews, but when the question about the establishment of an

enduring CoP culture came up, those who were not as enthusiastic as the majority influenced the replies. Corporate culture is demonstrated by the things that are accepted, discouraged, and/or encouraged inside a group. It also has a long-lasting impact on the attitudes and behaviors of the group (Groysberg et al., 2018). The participants agreed that not enough time had passed to firmly establish the CoP's culture but were optimistic the group would grow together toward fulfilling the VB statement and would succeed in establishing and maintaining a positive culture.

One participant felt that the VB statement was rarely mentioned during the retreat, thus diminishing its effectiveness, whereas the other respondents uniformly reported people recalling and sharing parts of the statement at various times. All participants agreed that the VB provided a valuable common experience that helped members feel included and connected, establishing a cultural landmark and benchmark for communal progress (see Cady et al., 2011).

Finally, the question of culture has to be addressed in the context of the length of the research. Leadership Stockton is a 10-month fellowship with only 6 weeks to establish the community before beginning their class service project. Although the CI and VB statement were expected to establish the beginnings of a corporate culture, the participants indicated the work was not yet finished. If the cohort can demonstrate a culture that is congruent with its established values over the life span of the CoP, the CoP will enjoy a good reputation and the CI and VB statement will have fulfilled the intentions for which they were created (T. J. Porter, 2013).

Researcher observations and the interviewees' responses indicated that the shared experience of belonging to a CoP and using CI to develop the VB statement contributed value to the formation of the group's corporate culture in the following ways:

- Despite a general agreement that the culture of the CoP was still in the early stages of development when this research concluded, the participants felt the process and product provided a positive foundation for future cultural growth by stimulating interaction between community members, thus fostering familiarity and social comity.

- The CI experience and resulting VB statement allowed all members to contribute to the construction of a defining organizational document, giving the participants a visible stake in the founding of the CoP.
- The CI provided a facilitated neutral forum for the cohort to confront arguments as a clash of ideas rather than a battle between personalities. In essence, the CI gave the group an arena to practice civil argument and debate in a nonthreatening, equitable manner.

Theoretical Implications

Theoretical implications focus on how the findings align with, contribute to, or challenge existing theory within the field of study. The purpose of this case study was to examine the experiences of professionals participating in a 10-month civic leadership education CoP as they used CI to establish a VB statement. The primary research subject was the CI (itself a research exercise) and its effects, with the VB statement serving as the product of the CI and the individuals who made up the CoP serving as both researchers within the CI and subjects of the primary research.

Collaborative Inquiry Findings

Because the research questions primarily addressed the effects of the CI, the CI dominated the theoretical findings. This research displayed general alignment with published collaborative inquiry theory and furthered the theory in the area of CoPs. P. Adams and Townsend (2014) suggested six characteristics that indicate a CI would be beneficial for growth. This CoP CI fulfilled four of those characteristics: (a) it shared internal responsibility, (b) was custom built for and by the group, (c) was inquiry based rather than instructional, and (d) was conducted as a shared experience with no one left out or isolated. The nature of the program obviated the other two non-applicable characteristics: (a) it was an episodic session rather than a sustained series (concluding once it attained its creative objective) and (b) was not site-embedded since the group has no formal home and meets in a different venue every month. The CoP also fulfilled V. Friedman's (2006) standards for flourishing as a community of inquiry: both the facilitators and community

members committed to a set of common values, procedures, and terminology and approached the CI as co-researchers in practicing critical examination of their subject. Although the orientation session provided a venue for the forming process of Tuckman and Jensen's (1977) group development, the CI became the arena for the storming process as the cohort moved into their first group negotiation experience.

The nature of this CI furthered published theory by pushing into an unexplored application of CI, the experience of using a CI to build an organizational VB statement at the genesis of a CoP that comprised 32 people. The original intention for CI was to pursue mutual education in an atmosphere that provides for individual growth in both personal and professional capacities for small groups (Kasl & Yorks, 2002). The objective of this CI was to support the creation of a new community by finding common ground and agreement in producing an original VB statement rather than exploring a subject to learn about it or uncover new meanings. The size, framing, and execution of this CI was a deliberate departure from personal education to a group-creative process that provided a venue for the participants to articulate their preferred behaviors in drafting a values statement to support a CoP that operates under shared leadership and consensus theories. The model for this original application of the CI process is shown in Figure 3.

Shared leadership is not considered as a separate theory because it serves as a component of CI. As a practice of lateral leadership among peers, shared leadership promotes team cohesion and impetus for the group to concentrate on their common goals (Klasmeier & Rowold, 2022; Pearce et al., 2007). In the case of the CI, the facilitator/researcher did not assume a leadership role but served more as a scribe, timekeeper, and schedule monitor for the cohort as the members shared leadership duties among themselves.

Values and Behaviors Findings

The pursuit of a VB statement is closely aligned with values and behavioral theories and presents no challenges to those theories. The goal of the CI was to produce a values and behaviors statement that would reflect the manner of

behaviors the community members preferred to practice, whereas the hoped-for effect of the CI was that the CI process would result in a positive influence on the formation of the CoP and its subsequent operations.

Values theory provided an essential descriptive vocabulary for the inquiry and the process of sorting behaviors (see Figure 3). The values clarification exercise was beneficial to the group's cohesion because it intentionally acknowledged the uniqueness of the individual, general respect for human rights, care for and service to all community members, and an emphasis away from particular interests toward the common good (Melé, 2003). VB theory provided the tools and the arena for a successful CI.

Communities of Practice Findings

Through the years, classes of Leadership Stockton have fit well into the theory definitions of communities in general and CoPs in particular. Jewkes and Murcott's (1996) contention that all definitions of community share core elements (collective sharing in the oneness of condition, purpose, and need) blend with Lave and Wenger's (1991) CoP theory that learning is social in nature and can be better achieved in a social setting and support. This group found the establishment of their VB statement to be foundational for their CoP. Farnsworth et al. (2016) defined CoP as a group that shares intellectual resources and skills, worries, issues, or interests that bind them together, which is an apt description of the Leadership Stockton fellowship. The Class of 2024's makeup and experience demonstrated accepted theory to be accurate and did not move beyond the established theory boundaries to challenge or extend theory.

Practical Implications

Practical implications focus on the application and implications of the study's results beyond theory and in the real world. The RQs for this research focused on the CI experience and its effects on the development of the cohort as a CoP, the group's corporate culture, and the participants' experiences and the meaning they derived from CoP. For the purposes of this section, the CI is viewed

as the process and the VB statement as the product, and the CoP were both producers directly affected by the process and consumers of the finished product.

Collaborative Inquiry Findings

As a process, the CI served as a crucible for a group of individuals who were strangers to one another to forge a community while creating the product of the VB statement, illustrating the storming and norming aspects of Tuckman and Jensen's (1977) work on small group development. The group achieved aspects of forming through introductions during the orientation day and various team-building games the morning of the Leadership Dynamics Day. The sometimes-intense negotiations of the CI caught several unaware. A few expressed discomfort with the sometimes blunt conversation, but the overall effect of the CI was the normalization of group exploration of different approaches to different ideas and a recognition of the distinction between personal conflict and the clash of ideas.

The journey can be eased through the storming and norming of group formation. When participants were asked to articulate the behaviors they wanted to see embraced or avoided by their new community, they were asked to expose some vulnerability. Such vulnerability should be honored by group members and the facilitation of the CI must be approached with an attitude of humble inquiry (Shani & Coghlan, 2021). Facilitators and emerging informal leaders should work diligently to identify any signs of bullying or domination within the group dynamic and gently redirect conversations accordingly. Rather than directly challenging statements, questions such as "What would that look like?" or "How do we translate that proposal into action items?" can subtly reveal flaws in declarations presented with great certainty without appearing to be an attack on the individual. Rather than discarding unworkable ideas out of hand, the program coordinator and facilitator physically gathered all the proposals together and had the group choose which ones stood out as the best examples. Those left behind were not so much rejected as included in a group of ideas that were simply not chosen.

One of the challenges faced by the Leadership Stockton CoP was its size. The class of 2024 had 32 people, much higher than the recommended number CI participants of five to 12 (Bray et al., 2000). To overcome the danger of persons

being left out of the conversation, the program coordinator and facilitator broke the group into small groups of no more than five people, mixing up the groups from time to time to avoid groupthink and bullying. All information requests were presented as requiring responses from each individual, but the information gathered were presented by the entire small group, a strategy intended to alleviate the discomfort of those who might be ill at ease sharing with the larger group. Such practices should be in place for all larger groups.

The CI should be recognized as a place where conflict is expected and participants are empowered to ask each other hard questions in the spirit of pursuit of solutions without accusations (Nelson et al., 2010). Participants should be prepared to support nonthreatening dialogue, first by practicing active listening as a communicator and then by intervening in the spirit of shared leadership when they observe intense communication turning toward personal aggression.

Values and Behaviors Findings

Behaviors are values instantiations: concrete demonstrations of cultural and personal values (Suhariadi, 2016). Given that behaviors that support goals associated with desired values are encouraged, whereas those that do not support such goals are discouraged, the CI process worked backward from typical values theory (Schwartz et al., 2017). The participants named desired behaviors before deciding on values labels, a process counterintuitive to the word order in the term "values and behaviors." In essence, the behaviors were defined as the precursors that led to the choosing of general descriptors that then became the values labels, a progression that is practical for those who care more about behavior than labels.

When sorting the behaviors before affixing the values labels, various organizational value types should be considered and the behaviors should be sorted according to type. Values can be aspirational, core, shared, or antagonistic and should be recognized and sorted accordingly (see Figure 3; Bourne & Jenkins, 2013; Denison et al., 2014; Vveinhardt et al., 2016). The sorting of behaviors into classifications can be a tedious and argumentative process, but it must be done with care and not be hurried to ensure all participants have the chance to speak into it. In remembering that the VB statement is the product, it should be noted that the CoP

are consumers in addition to producers and the VB statement is a symbol of their community identity (Branson, 2008). It is essential to distribute copies of the VB statement to all participants and display it prominently at all CoP gatherings.

Communities of Practice Findings

Members of the Leadership Stockton class of 2024 came from various work backgrounds and life experiences, representing Stockton as one of the most diverse cities in America (US News & World Report, 2020). With such diversity in mind, the group's emphasis on seeking and cultivating understanding along with respect and social comity was logical. Considering the cultural dynamics of the day (including a heightened sense of cultural sensitivity) the group ethos was one of determination to respect one another while making room for differing opinions. The move away from a "cancel culture" attitude was not overt during the CI, but appeared to gain momentum during the retreat. If a diverse group of individuals is desirous of forming a CoP, establishing various ways to connect as community members is essential. Their level of commitment to connecting on an individual basis will provide an indicator of their success in building a CoP that will hold together well over time via the exercise of communal intimacy (Freeman et al., 2022; Törnqvist, 2021).

Leadership Stockton is a program rooted in education. Its mission is to "inspire a new generation of men and women ready to assume leadership roles in the community" (Leadership Stockton, n.d.), and it does so by conducting once-a-month day-long events to educate the cohort about the community, its resources, and its needs in various ways. However, the education aspect of the program is supplemented by the action of a community service project, so the application of the theory gained in their educational days has to be put into practice for the cohort to function as a CoP. Much as behaviors are instantiations of values, the community service of the cohort is the instantiation of their communal education.

In addition to the characteristic of community, a CoP must be a group that shares interests and competencies along with sharing purpose and resources, fostering a sense of belonging in the group along with member interaction (Li et al., 2009; Wenger, 2011). Two questions have been presented to measure the

success of a CoP: Did participants form new working relationships or revert to previous ones? and, Have the new relationships become long-lasting? (Borrego et al., 2007). Ultimately, the group has to come to the collective and individual conclusions that both finding commonalities and embracing differences are essential for the creation and operation of their CoP if they are going to enjoy communal success.

Limitations

All case studies are conducted within a finite set of parameters and as such, present various inherent limitations. The study involved a group of 32 individuals in a CoP designated to be convened for less than a year. As such, conclusions may not be generalizable or applicable to smaller or larger CoPs or CoPs of longer or shorter duration. Because the CI was conducted in a single day and final follow-up interviews were concluded 6 weeks after the CI, the research was limited to immediate and short-term effects. The study did not include research into the presence or efficacy of reinforcement or follow-up efforts. Interview participants were self-selected volunteers. Despite comparing interviews with researcher observations and the documents generated by the CoP, response bias or inaccuracies may be present. I made meticulous efforts to uphold ethical standards throughout the research process, but there is always a possibility of inadvertent or unforeseen ethical limitations that may not have been fully addressed.

The CI to establish a VB statement is only one of the various measures available to create and nurture a CoP. Other CoP-building strategies include intentional knowledge sharing and continuous learning, cultivation of personal relationships and networks, building of communications networks for sharing of feedback, addressing needs and challenges, and suggesting of improvements, as well as the establishing of mentorships. These dynamics were not included as part of this research project.

Recommendations for Future Research

The nature of Leadership Stockton limits research on this particular CoP to a maximum of 10 months. Lengthening the inquiry to the life of the cohort and

introducing other methodologies such as surveys or focus groups and differing sample sizes may be necessary to expand upon these initial insights.

Due to the nature of the CoP being studied, the CI was conducted in a single session supplemented by an earlier orientation session. Future research of a broader scope that includes multiple sessions and follow-up efforts is indicated. A study of the effects of the CI on other CoPs such as volunteer, corporate, government, social, and sporting groups is recommended. Because this research was conducted with a newly forming cohort, studies of the effect of using a CI to create VB statements for well-established CoPs are needed.

Summary and Conclusion

There has been no research into the dynamics and meaning derived by a group of professionals using CI to create a VB statement in the early phases of building a CoP. Previous research has indicated the value CI can bring to the operation of a CoP, in particular exploration and resolution of social friction within the CoP and personal issues. Newly formed CoPs thrive when they construct appropriate values systems and establish congruence between values and behaviors. In this case study, I used CoP-generated documents, individual interviews, and other observational techniques to determine meanings derived from the inquiry and identify the value individuals and the group as a community may have gained from the CI. The study research questions addressed how using CI to establish the VB statement affected the development of the CoP, the meaning individual participants derived from the experience, the effect the experience had on individual participants, and the contribution the shared experience made to the formation of the group's corporate culture.

The study involved the cooperation of the Leadership Stockton Class of 2024, members of a 10-month local education fellowship administered by the Greater Stockton (California) Chamber of Commerce. The Class of '24 had 32 members, all interested in learning about and becoming leaders in one of America's most diverse communities. Class membership reflected the racial and ethnic makeup of the community.

A hermeneutic and systemic approach to data analysis revealed a grand theme of Communal Intimacy, supported by the themes of Respect and Social Comity (supported by subthemes of Common Pursuit and Collaboration) and Seeking and Cultivating Understanding (supported by subthemes of Conflict Strategies and Communication in Conflict). The themes reflected the membership's desires to step outside of their respective comfort zones and connect outside of their respective communities. This research supported the use of a CI to support the CoP by providing a nonthreatening atmosphere for initial social familiarization and encountering unfamiliar perspectives, supporting a process that ensured all participants had a voice in the formation of the CoP, and building social intimacy by supporting social comity and active listening. The participants derived meaning from the CI by practicing self-discovery and discovery of others in an interactive communications-based forum that constructed a VB statement to establish the group's identity and social structure. The CI also provided a positive foundation for future growth of the CoP's culture.

This study furthered published theory by investigating a hitherto unexplored application of CI, using a CI to build an organizational VB statement at the genesis of a CoP that comprised 32 people. The size, framing, and execution of this CI was a deliberate departure from previous CI exercises of small groups pursuing personal knowledge into a group creative process that provided a venue for drafting a values statement to support a CoP following shared leadership and consensus theories.

The practical implications of this research provide guidelines for preparing participants for the CI experience with instructions regarding nonthreatening dialogue, active listening, and the basics of shared leadership. Organizers should ensure that participants understand they have both a right and a responsibility to contribute to the conversation. The CI process should be paced appropriately, fast enough to keep participants engaged but slow enough to ensure discussions are thorough and complete. The ultimate goal is for the group to arrive at the collective and individual conclusion that embracing both differences and commonalities is essential for a successful CoP. Because this research was a case study, the limitations of research focused on a small group and a specific set of operating

conditions, indicating great opportunities for further research. The broad array of research factors such as size of the CoP, duration or number of sessions of the CI, maturity status of the CoP and a host of other factors are available to future researchers.

In conclusion, values and their associated behaviors should be seen as the bedrock for CoPs no matter how large or small. The health of a community can be measured by the strength of its dyadic relationships. Just as Velcro's individual connections of hook and loop are weak but taken together, can be very robust, the many relationships within a community of purpose provide for communal strength. When every member of the community has a voice in the creation of communal expectations and values and behaviors are congruent within a community, the community will be a success by almost any measure. When administered properly, the use of CI to create a VB statement for a CoP can provide powerful tools for communal strength and growth.

A final word from a participant:

> At the end of that experience, I believe, and I truly believe this. The group came together. I mean, I know that there's a lot more events that we have to do, where we're going to probably come even more together or maybe create these bonds and friendship, but I think at that point, the group understood that we have to be together front on this. It can't be an individual or it's… it can't be a competition. It has to be all 32 people going in the right direction, doing the right thing. So that's what I believe we got out of it after that experience. ("Coach" Interview 2)

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Appendix A

Institutional Review Board Approval

SOUTHEASTERN UNIVERSITY

NOTICE OF APPROVAL FOR HUMAN RESEARCH

DATE:	June 14, 2023
TO:	Christopher Stevens, Joshua Henson
FROM:	SEU IRB
PROTOCOL TITLE:	Building a Professional Community of Practice Through Collaborative Inquiry
FUNDING SOURCE:	NONE
PROTOCOL NUMBER:	23 BE 08
APPROVAL PERIOD:	Approval Date: June 14, 2023 Expiration Date: June 13, 2024

Dear Investigator(s),

The Institutional Review Board (IRB) for the protection of human subjects has reviewed the protocol entitled, Building a Professional Community of Practice Through Collaborative Inquiry. The project has been approved for the procedures and subjects described in the protocol pending the following changes:

- Please add IRB contact information to the informed consent (irb@seu.edu).

Any changes require approval before they can be implemented as part of your study. If your study requires any changes, the proposed modifications will need to be submitted in the form of an amendment request to the IRB to include the following:

Description of proposed revisions;
If applicable, any new or revised materials;
If applicable, updated letters of approval from cooperating institutions

If there are any adverse events and/or any unanticipated problems during your study, you must notify the IRB within 24 hours of the event or problem.

At present time, there is no need for further action on your part with the IRB.

This approval is issued under Southeastern University's Federal Wide Assurance 00006943 with the Office for Human Research Protections (OHRP). If you have any questions regarding your obligations under the IRB's Assurance, please do not hesitate to contact us.

Sincerely,

Rustin Lloyd
Chair, Institutional Review Board
irb@seu.edu

Appendix B

Orientation Day Expectations Viewed as a Word Cloud

Appendix C

Guidelines for Conducting a Collaborative Inquiry

This document provides advice for the facilitation of a collaborative inquiry (CI) to establish a values and behaviors statement (VB) for a community of practice (CoP).

The venue should be large enough to accommodate the CoP in classroom seating with the ability to work in small groups of three-to-four people. You will need 5x7 post-it style easel pads, markers for the small groups, a whiteboard, at least one easel with a pad for large group work, and adhesive dots for voting.

Conduct a self-introduction and ice-breaker exercise appropriate to the group. For example, go around the room and ask each participant, "Please tell us your name, your job title, and the words you most love to hear."

Before beginning the inquiry, establish behavioral ground rules such as: every person's perspective has a place in the process, show respect to one another, practice active listening, don't interrupt, encourage everyone to participate by giving them your full attention, etc. Stress the concept of humble inquiry: the objective is for all to learn what the community wants from each individual rather than establishing what one individual wants from the community.

After introductions and ground rules, describe what to expect during the CI by reviewing highlights of this timeline with them. Be prepared to explain each step fully when the time comes.

- The exercise typically takes between 60 and 90 minutes.
- Begin by splitting up into random groups of 3-4 people. It would be best to randomize the groups yourself, but if you choose to let them self-select, encourage people to group with people they do not know to get better acquainted and hear diverse opinions.
- Each small group should list behaviors they want to encourage and discourage in the CoP, printing them on the provided easel pad paper. For example, "Being on time" or "Not interrupting someone in a meeting." (This should take 15 minutes or less.)

- Everyone must contribute to their small group's list and their contribution should be in their own words, not edited or rephrased without their express permission.
- After each small group completes its list and confirms everyone has contributed, reconvene the large group and discuss, compare, and combine similar or related behaviors into a master list by categories. (This should take about 15 minutes.)
- Give the categories appropriate titles as values through group discussion and list appropriate behaviors. For example, "Courtesy: When others speak, we make certain they have completed their thought before we respond. We respect one another's time by being punctual." Sort the individual behavior statements into the type of values they embody:
  Aspirational values – values we strive to fulfill.
  Core values – values that define the organization.
  Shared values – values to which all organization members subscribe.
  Antagonistic values – values that manifest in behaviors that all agree are destructive and should be avoided. (This should take 15 to 25 minutes.)
- Once the group agrees all items have been included and grouped accordingly, everyone gets five dots and may vote for the individual VB statement or statements they feel are most important by placing their dot(s) next to the statement. If they desire to vote for a statement more than once, they may do so. (This should take 10 to 15 minutes. If the resultant values titles and behavior definitions are generally agreeable to the entire group and the resulting document is manageable, consider skipping the dots voting exercise. The entire group should agree to this option.)
- Rank the individual VB statements by their number of dots and engage in further group discussion as reflection and evaluation deem necessary. If you need to repeat any of the steps described to achieve communal clarity, do so. (This typically should take 15 minutes or less unless there is unusual confusion regarding definitions.)

- The group triages the list. There is typically a visible break between the highest-ranking individual VB statements and those that do not address the greater purposes of the group. If the list does not have an evident break, facilitate conversation to establish how long the list should be. (The time for this triage will vary, but it usually is very short.)
- Confirm consensus. Be patient and address all concerns that are presented. Watch carefully to see if any introverts look like they would like to speak to an issue but need encouragement. (Time for this task varies.)
- Present the final version of the communal values and behaviors statement to the group and publish it to them via email as soon as is practicable.
- Give the group the opportunity to revisit the statement and clarify group understanding of definitions at a later date. Further editing is an option, but only if there is broad consensus that it is necessary.

Resources:

Collaborative Inquiry in Practice: Action, Reflection, and Making Meaning (2000) John N. Bray, Joyce Lee, Linda. L. Smith and Lyle Yorks, Sage Publications

Collaborative Inquiry for Organization Development and Change (2021) Abraham B. Shani and David Coghlan, Edward Elgar Publishing.

The Power of Collaborative Leadership: Lessons for the Learning Organization (2000) B. Frydman, I. Wilson, and J. Wyer, Butterworth-Heinemann.

Appendix D

Leadership Stockton Values and Behaviors Collaborative Inquiry Agenda

This collaborative inquiry is designed to assist you in building your LS Class as a Community of Practice. Our objective will be to compile a short list of shared values that will be defined by associated behaviors that illustrate the culture of your cohort. The process typically takes between 90 minutes and two hours.

- We begin by splitting up into groups of 3-4 people based upon the placement of your table-tent nametags.
- Each small group should list behaviors they want to encourage and discourage in the cohort, printing each behavior on a separate sheet of the provided easel pad paper. For example, "Being on time" or "Not interrupting someone in a meeting." Everyone must contribute to their small group's list. (15 minutes or less.)
- After each small group completes its list and confirms everyone has contributed, we will reconvene the cohort to discuss, compare, and combine similar or related behaviors into a master list by categories. (about 15 minutes.)
- Through group discussion, we will give the categories appropriate titles as values and list appropriate behaviors. For example, "Courtesy: When others speak, we make certain they have completed their thought before we respond. We respect one another's time by being punctual." (15 to 25 minutes,)
- Once the group agrees all items have been included and grouped accordingly, everyone gets five dots and may vote for the VB statement or statements you feel are most important by placing your dot(s) next to the statement. You may vote for a statement as many times as you like. (10 to 15 minutes.)
- We will rank the individual VB statements by their number of dots and engage in further group discussion as reflection and evaluation deem necessary. If you have and questions to help achieve communal clarity, we will discuss. (This typically should take 15 minutes or less unless there is unusual confusion regarding definitions.)
- We will triage the list. There is typically a visible break between the highest-ranking individual VB statements and those that do not address the greater purposes of the group. If the list does not have an evident break, we will continue the conversation to establish how long the list should be. (The time for this triage will vary, but it usually is very short.)
- We will sort the list, classifying the values as Aspirational, Core, Shared, and Antagonistic. After we have addressed all your concerns and confirm consensus, we will review the final statement for clarity.