

# Getting to the Bottom of ToP

Foundations of the Methodologies of the Technology of Participation

Section 3: ToP Facilitation	ı Design
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The process of designing a complex	$ToP\ facilitation$	approach, a	and a practical	process for	applying	ToP
in responding to client needs						

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## 11. Charting

You are not interested in ideas, but in the human being that is over against you in this. You are interested in the self. You have not charted unless you are other than what you were when you began. You may have gone through some intellectual rational process, but you have not charted. Charting is changing your posture and your being in history. Or to put it another way, it is the gimmick whereby you alter your existence through the genuine encounter with another human being.

—Joseph Mathews<sup>73</sup>

In my last year of university, I put one assignment off until the very last moment. I needed to read a book of essays, then summarize five of them. I had only one day to read the whole book and finish the assignment, and my graduation depended on it. Suddenly I remembered that I had learned the charting method in a course with the Institute. I quickly made a high level chart of the whole book, making a visual chart to get a sense of the flow of the essays and the likely content. From that chart, I chose the five essays that interested me most to work on. I quickly charted each of these, using structural clues to find the core content and summarize it on a visual chart. Then I wrote a paragraph that reflected the key points in each essay. The paper was finished in less than a day, leaving me time to type it up and hand it in before the deadline.

Years later, after becoming a facilitator, I participated in a two-day training session for community facilitators in order to qualify for a chance for a contract with a government agency. The professor who had designed the process presented us each with a four-inch thick manual, and proceeded to walk us through it, word for word, page by page. The experienced facilitators in the room quickly lost interest, became resentful, and checked out. In order to understand the big picture of what would be required of us, I took out a sheet of paper and made a visual chart of the whole manual

<sup>73</sup> Mathews, 1968

instead of listening to the presenter. That evening I copied my handwritten chart and offered the copies to everyone in the room, as a way to get a handle on the big picture. Even the presenter was grateful to see each of the pieces of the manual in relation to the whole project.

## Background

We often feel that by reading something we will absorb the content. In "How to Read a Book"<sup>74</sup>, Mortimer J. Adler and Charles Van Doren describe four levels of reading.

- 1. Elementary reading, which involves basic reading skills like vocabulary and grammar. At this level, we become literate; so we can understand what is being said.
- 2. Inspectional reading, which they describe as "skimming systematically." It is a very quick look in order to gain an overview.
- 3. Analytical reading is reading in depth for the sake of understanding.
- 4. Syntopical reading or comparative reading in which the reader seeks to analyze a topic through the reading and analysis of several works.

Charting was developed primarily from levels two and three. The method begins with their level two, skimming the given work and highlighting key words, phrases and ideas. In their section on analytical reading, Adler and Van Doren advocate creating an outline of a book. Their examples of outlines follow the traditional, vertical format. ICA devised a way to hold the whole picture and the details at the same time in a horizontal picture.

Figure 25 shows a topical chart of Chapter 7 in *The Courage to Lead*, by Brian Stanfield<sup>75</sup>.

In ICA's application, the page is turned on its side to landscape layout in order to create a horizontal outline or a 'chart' of the material being studied. Usually the chapters of a nonfiction book are numbered. In an essay the reader numbers each paragraph in sequence. A horizontal line is drawn a third of the way down the paper and divided into the number of paragraphs in the essay or the chapters of a book. This immediately creates a graphic that allows one to see the whole of the essay in one image.

The key words and ideas in each paragraph are written under the line. (In the example above, the subtitles of the chapter are used as the detail in the sections rather than key words from paragraphs.) The reader quickly skims the content to get a sense of the whole work. Structural clues such as "in the first place" or "after that," or content clues such as subtitles can also be captured at this stage. The next major step is to find the major sections within the work. Dividing lines are drawn upwards from the horizontal line to denote the shift to new sections. Each section focuses on a distinct topic. The sections are titled to reflect the major focus or point. Often sections can be combined into larger topics, because a long essay might consist of several major topics, and each major topic of several subtopics. This structure provides the reader or group with a unified image of the major points the

<sup>74</sup> Adler and Van Doren, 1972

<sup>75</sup> Stanfield, 2012

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Chart		Images Determine Behaviour	Arenas of Knowing (Practical Behaviour)	Time	ב ב	2	ر	7	Listo	introduces the subject (setting the scene) 1st prop.		Human behaviour is determined by images.		This paper of THE IMAGE is		
Four-level Chart		u		Snace	Jhace	-	,	-		intro		Hum		This p		
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Sample four-level chart of the introductory concepts in Chapter 1 of a book FIGURE 24

				CHAPTER 7. S	SOCIAL PIONEE	R			
	Deciding to re in a new v	•		Images of the mission The action of the of the social pioneer social pioneer					
Do I dare?	Living on behalf of the future	Creating new models and systems	The mission of the social pioneer	Between the no longer and not yet	Addressing major social concerns	Qualities of the social pioneer	The task of the social pioneer	How can I get started?	Leadership challenges

FIGURE 25
A topical chart of the content of a chapter of a book

author is making in the work. Finally, the whole work is given a title that summarizes what the author is saying. This has been referred to as a "topical" chart. As Gealy<sup>76</sup> says, speaking of reading the New Testament of the *Bible*, "Integrity demands that we attempt to discover, impartially, what Matthew, Mark, Paul, John and Luke have to say – to allow them to speak for themselves." The *Bhagavad Gita*, the *Torah*, a novel by James Joyce, or a complex policy document can be viewed in the same way.

The same work can also be charted functionally. Clarifying the role and function of each part in the whole helps in understanding the structure of the writer's thought. This process facilitates a deeper understanding of way the author puts together their ideas, and helps clarify questions. It is a very useful tool for literary criticism, policy analysis and academic interpretation.

Similarly, following Adler and Van Doren's approach, one can create a *propositional chart*. The reader works through the sections and states the author's points in their own words. Finally, one can create what has been called an *existential chart* that describes the impact of each part of the work and the whole work on their own life. These approaches have been called levels in the charting process, as each level reveals more to us.

## The Phenomenology behind the charting method

#### Intentional focus

Often when we read something, we begin to argue or raise questions with the text before we have even absorbed its message. When we do this, we miss valuable insight and can stay stuck in our previous understandings. We may not even know what we are disagreeing with if we have not listened carefully. This collapses a dialogue into a monologue where we only listen to ourselves. The intentional focus of the charting method is to deeply understand what an author is saying, in order to allow honest dialogue between the author and the reader.

<sup>76</sup> Gealy, circa 1960s

#### Radical openness

Charting enables a reader to stay open by setting aside or 'bracketing' all previous understandings, suspending our assumptions, and preparing to listen. One looks at what is actually being said to enable the writer to reveal new insight and make an impact on the reader. Only then, after understanding what the author is actually saying, one is prepared to relate to the work contextually and existentially. The reader allows their being to be altered in the encounter with another and names the impact of the ideas and the choices they believe they must make.

## Method of inquiry

The method of inquiry in the charting method follows four basic stages, creating a visual image for each. The reader moves incrementally through levels of understanding, and articulating a relationship to the message of the paper.

## Level 1. Topical understanding

The topics give impressions of the broad inclusive images of content. They provide simple answers to the question: What is this section about?

## Level 2. Functional understanding

The functions clarify the structural relationship of all the sections of your chart: (introduction, conclusion, thesis or main points, transition, and so on). These terms are simple answers to the question: What role does this section play in the paper?

#### Level 3. Propositional understanding

Propositions state what is in each paragraph or each section of the structure of the paper, and finally the whole paper. The propositions organize the interior content of each paragraph and section. This is still stating what the author means, articulated in your own words.

#### Level 4. Existential understanding

This level has to do with how the paper's message affects you personally. This level is never absent; it is about engagement with the paper, but it is at this stage where it finally becomes prominent.

Figure 24 shows a four-level chart of the first 27 paragraphs of Chapter 1 of *The Image: Knowledge in Life and Society*, by Kenneth Boulding.<sup>77</sup>

## **Design patterns**

The basic design pattern follows a set of charting procedures that are similar to the four levels of the focused conversation method. You are structuring your own conversation with the author.

#### Part 1. Getting started

Getting a grasp of the whole paper or book

<sup>77</sup> Boulding, 1956

As a phenomenological process, the initial steps move incrementally through the process of really being aware of the author's content. This first stage is quite rapid.

- 1. Decide to love the paper or book—feel it, pronounce the author's name, look at the covers, etc.
- 2. Explore the entire contents—take a quick look at subtitles, opening and closing paragraphs, words that jump out at you, and guess what the whole paper or book is about.
- 3. Number the paragraphs in the paper, the chapters if it is a book, or the sentences if you are charting a particularly convoluted paragraph.
- 4. Lay out the chart in landscape orientation. Place your paper with the long side across and draw a horizontal line, perhaps a third of the way down, across the length of the paper (sometimes 8 ½" x 14" or A1 paper helps). Divide the line into as many sections as there are paragraphs (or chapters), and number the spaces to correspond with the numbering in the document. Do this very quickly. This is a working chart, not a final copy.
- 5. Quickly scan for structure—don't read, but look quickly for transitional clues, numerals, italics, transitional words. Highlighting or underlying structural clues can be really helpful. Read, at most, the first four words of each paragraph or chapter. Record findings on work chart below the line. (Functional clues)
- 6. Quickly scan for content. Again, don't read. Look for simple topical headings, and read, at most, the first and last sentence of each paragraph or chapter, scribbling what you find below the line. Don't necessarily start with the first paragraph, but start where topics emerge easily. Then complete all the paragraphs. (*Topical clues*)

#### Part 2. The depth dialogue

How to ask the paper good questions and hear answers

At this point you begin to articulate your personal response, with impressions and questions that still allow the author to have their say, while at the same time beginning a dialogue with the author.

- 1. What are the sections emerging in your chart? Draw lines up from the baseline to separate the sections. What functions does each section play (introduction, conclusion, transition, etc.)? Give each section an impressionistic title. Record it above the line. (Functional level)
- 2. You still have not read the paper. Where do you need more data?

  Ask your questions, read in appropriate places, and record your findings below the line in the sections. (*Topical level*)
- 3. What questions are you now raising about a) the structure of the paper, and b) the content of the paper? Read to complete your picture of the paper and answer your questions. Don't read just to be reading. Keep your side of the dialogue engaged. (*Topical level leading to propositional level*)
- 4. Organize your findings into a total picture above the line. Give each of the important paragraphs a title that holds the author's meaning in your own words. Give each section a meaningful title in a consistent way, such as with similar parts of speech. Give a good title to the whole paper that holds the author's meaning in your own words. (*Propositional level*)

- 5. Ascertain where the key questions and paragraphs of the paper are. Mark or record these on your chart for further exploration into the heart of the paper.
- 6. In a mirror image of the structure extended below the line, write a brief proposition in your own words stating what is in each paragraph or each section of your structure, and finally the whole paper. The propositions organize the interior content of each paragraph and section. (*Propositional level*)
- 7. Finally, either at the bottom of the page or on the back of the holding chart, answer these four questions: (Existential level)
  - a. What shifts in your understanding or images of the topic has this paper provoked for you?
  - b. What does this call into question in your current life?
  - c. What positive contribution has this paper made to your self-understanding?
  - d. What is your critical appraisal of this paper?

## Design pattern variations: other types of charts

## Teaching chart

When teaching a seminar, the leader can present a teaching chart made ahead of time to help summarize complex content. It includes key points, good questions, images, illustrations, the amount of time to spend on each section, etc.

#### Art chart

This simplified chart helps communicate the drama of the paper. Added graphics can help focus on the meaning.

## Reverse charting

Charting can also be used in reverse to determine the structure of a paper, report, or book, especially in team writing. In this process, the authors brainstorm the content of the paper, perhaps using the consensus workshop method to cluster the individual ideas into areas of similar content. Then the content can be structured into a chart to create the flow of the ideas in the paper. The horizontal format gives a different picture of the content than an outline. It helps you see the flow and how the content builds to a conclusion.

#### Impact of the charting method

Like many students, when I graduated from university I owned a large number of textbooks that I found very interesting and useful, and did not want to get rid of. But after several moves where I had to lug heavy boxes of books from one place to the next, I decided something had to happen. I took each textbook in turn, and charted their content. I made sure to include all the seminal points that I found useful, adding extra pages when necessary. I put all the charts in one binder, and suddenly my entire collection was not only easy to carry with me, but easily available when I needed the knowledge.

A Catholic education client asked for a course to train school leaders, with a section on how canonical law affected the ways schools made decisions. Someone copied, cut and pasted together a document that included a wide variety of excerpts from canonical law that affect education. A cursory reading could not discover any reason for the way they had put it together. So the facilitator charted the document, and discovered a logical flow to the document that made the whole piece make sense. When the teaching chart was presented, the participants were able to understand that section and teach it to others.

One large organization had only 90 minutes to understand the implications of a long and complicated new policy, so that they could plan how to change their actions to comply with the policy. The facilitators prepared for the meeting by charting the document, and posting a large visual chart on the wall. The group was divided into small groups. Each small group skimmed and then summarized the key points of a section. (This is sometimes called the jigsaw method.) They posted their summaries on the wall under the visual chart of their section and reported back to the group. There were some questions of clarification of each group, and then they discussed the results. After the 90 minutes everyone in the group understood the implications of the policy for their work. The facilitation then continued as the group planned their response.

A team consisting of representatives from a major utility and a First Nation had been working together for several years to resolve a major 40-year-old conflict. They were tasked with writing a report about the situation, what they had learned from their work, and their conclusions. The group first used the consensus workshop method to brainstorm all the things they needed to include in the report. There were 10 clusters of points, each cluster a major topic. The group decided that each cluster was a separate chapter. They arranged the titles of the clusters in the form of a chart, with an executive summary, introduction, core content chapters, and a conclusion. Then, using the chart and the brainstormed data under each column, they sat down in pairs that included one person from each side of the conflict, and wrote prose that communicated the brainstormed content. These draft chapters were edited by other teams, and a 60-page report was written in a matter of days. The conflict was eventually resolved, with the clear supporting documentation from the report.

#### Conclusion

The charting method is an extraordinary study method that uses visual tools to effectively understand and record the core insights of an author and their relationships within the document, while fostering authentic dialogue between the reader and the author.

## 12. ToP Seminar Methodology

Education either functions as an instrument which is used to facilitate integration of the younger generation into the logic of the present system and bring about conformity or it becomes the practice of freedom, the means by which men and women deal critically and creatively with reality and discover how to participate in the transformation of their world.

—Paolo Friere<sup>78</sup>

Too often in study you have learned to hate, rather than love, and when you hate you do not really study or learn.... I will never forgive some of my professors who taught me to listen to what was wrong.... When I was looking for something that was wrong, I could not study because I could not change, for I had all the answers before I looked at that document.

—Joseph Mathews<sup>79</sup>

In an advanced facilitation training course, we use the seminar methodology to train facilitators, using a paper called "Facilitation from the Inside Out" by John Epps<sup>80</sup>. After creating a chart of the paper together (as in Chapter 11), we break people up into small groups to find the key points and visual images of each section, which they post on the wall chart. Then we have a conversation about the paper, which asks participants for examples of where they have experienced the key points in their own lives. Finally, we ask them to reflect on what the paper is saying to them about profound or transformational facilitation, and what impact the paper has on them—the "so what" of studying the paper.

The combination of demythologizing, grounding abstraction or story in real life (see Chapter 2, page 16), with charting evolved into what has been called the seminar method. Its primary

<sup>78</sup> Friere

<sup>79</sup> Matthews, 1968

<sup>80</sup> Epps, 2005

application is in the group study of books and essays with the intent of integrating the insights of the study into their life choices.

## Background

Briefly, the seminar method involves several steps.

- 1. A seminar begins with the object of study, such as an essay or a chapter from a book.
- 2. The group creates a topical chart to summarize what the author says.
- 3. Individuals express their intuitive impressions and reflective responses, including real-life examples from their experience.
- 4. Together the group explores the context and engages in interpretative dialogue.
- 5. Individuals, and sometimes the group as a whole, determine the significance of the study for their own lives, and clarify their decisions and commitments in relation to the topic.

## Application

The seminar method is used for participatory education rather than facilitation. In a seminar, the group is not asked to create its own solutions or make its own decisions (as in facilitation), but to learn from an author. Usually the decisions coming out of this kind of seminar are personal decisions about how to relate to the content of the author (education). The seminar starts with the charting method described in Chapter 11 (p 148-155) and continues with group dialogue with the material being studied.

This kind of seminar goes beyond intellectual understanding and argument. It is designed to encourage participants to struggle with deep questions that the author raises about their assumptions and images of themselves and the world.

## The phenomenology behind the seminar method

#### Intentional focus

The *intentional focus* of the seminar method is on the dialogue between the ideas of an author of a paper and the participants in a group studying that paper. The ideas of the author are deeply respected, as the group takes the ideas and explores their significance in their own lives. Participants make choices about how to relate to the author's ideas, but only after deeply exploring their relevance in their own lives.

#### Radical openness

The *radical openness* of this process is the discipline to take time for the group to thoroughly understand the content of the author's message first, before allowing people to react to the content. The process is also open to the struggle of the participants, who may or may not respond positively to what the author says. The leader can ask tough questions that cause people to examine their reactions, and become more open to others' responses as well.

		PREPAF	PREPARING TO TEACH A SEMINAR		
Place:	Pape	Paper to be studied			Date:
Put your					
chart of the					
paper here					
What point in the paper do want everyone to understa (Rational Aim)	What point in the paper do you want everyone to understand? (Rational Aim)	What do you want to happen to the group? (Existential Aim)	What kind of people are in the group?	What is the mood of the seminar to be? What style will enable that?	When should the high point be? (Overall Drama)
Title of the Seminar:	ninar:				
Prelude		1. Introducing the subject: paragraphs #s	2. Experimental digging into the subject: paragraph #s	3. Depth dealing with the heart of the matter: paragraph #s	Postlude
		For each of these sections	For each of these sections, create questions that will allow the group to answer:	the group to answer:	
What will you say first?	say first?	What is the author saying? 1.	How is this true of life as I experience it? 1.	What does this say about my life? 1.	To close, what is the provocative question or statement you will leave the group with?
What will you use to get the group's attention to open?	use to get the ion to open?	ю́			What will you say last?
What hook will you use to motivate the group?	ll you use to group?	4,	ų 4.	ý 4	How will you get offstage?
(Overall)	(Overall Introduction)	(Development)	(Climax)	(Resolution)	(Dénouement)
Board Images or Stories					
Time					

Template that includes all the steps to prepare to lead a seminar FIGURE 26

## Method of inquiry

The method of inquiry starts with carefully understanding an author's message. Usually the charting method is used first individually, and then with the group, because it has several levels of understanding built into the process. (See Chapter 11 on page 152.) The group discussion is then focused on grounding the author's key points in real life experience, and pulling meaning out of the dialogue between the author and the participants. The seminar finishes with integration of what individuals or the group have learned from the dialogue into their own lives.

## **Design patterns**

The facilitative educator prepares thoroughly for a seminar, making their own chart and thinking through the key points that the group needs to wrestle with. Then the facilitator decides what the rational and experiential aims of the session will be, and plans the specific steps of the seminar, making sure that there is adequate time spent on the key points. Figure 26 offers a template for preparing a seminar.

The charting step begins the seminar with each person creating a chart of the essay. Each individual does their own work and works through the material on their own, frequently before the meeting. The facilitator then works with the whole group, building on the individual charts, to create a common topical chart that serves as a point of reference for the rest of the seminar. In this step, individuals share the key words and ideas, how they divided the content into sections, and their titles for the various parts of the paper. When different people's titles differ, the facilitator directs the group back to the author's own words. The group can quickly grasp and summarize the basic content of the article as the author meant it, so the author can "have their say." The facilitator keeps the group focused on "the thing itself" for this part of the seminar.

Sometimes, if time is limited, instead of having the participants make their own charts, the facilitator creates a teaching chart ahead of time, and displays it where the whole group can see it, either projected or written on a large wall chart. This chart provides the concrete focus for the group work.

After the chart is done so there's a visual picture of the whole, group discussion begins and progresses section by section through the article. The facilitator guides the *reflective* conversation, enabling the participants to explore initial impressions, associations and responses. When people are clear about what the author is saying and they become conscious of their response, the discussion moves to interpretation.

In the *interpretive* stage, people explore the context and express insight into the meaning, significance and implications of the article's message in relation to their own existential questions. They engage in contextual interpretation. If the group has a common sense of identity and purpose, they will likely discuss an article as it impacts them and their work together as well as how it impacts individual people. A group of random individuals, such as a class, will likely focus on the meaning for them individually. The final step involves questions that enable each individual to determine the

impact of the ideas on their own lives and make their own decisions in relation to it. This can be very profound, as each person grapples with their relationship to life through the article.

The primary leadership role is that of guide who encourages deep dialogue. It is a distinct approach to teaching in that it is highly participatory and that the teacher adopts methods of engaging the students in self-examination and dialogue that lead to insight and its application in one's life.

The uniqueness of the seminar methodology is that it is deeply appreciative. Its major intent is to understand the wisdom of the author first as expressed in the book or paper, and only then to explore and ground the impact that wisdom has on the participants. It is not about debating the topic, or critiquing how the author expressed their ideas. Participants leave pondering the significance of new insights to their own lives.

## Applications

Usually, the seminar method is not used as a facilitation tool, because it is about wrestling with personal learning, not about creating a shared consensus.

However, a group may need to explore an abstract concept in depth together, in order to ground the abstraction in reality and have the deep conversation they need.

And a seminar can be used to teach facilitators, as in the opening story of this chapter. In the study of the paper "Facilitation from the Inside Out"<sup>81</sup>, facilitators are exposed to the idea that facilitation is about more than "masking tape," or simple activities and just getting a group to a product. John Epps proposes in his paper that facilitation is also about *guiding* the group in a number of profound ways. Participants in the study struggle with the roles that he proposes, which give them a way to consciously choose the facilitator role they want to play.

In *The Courage to Lead*<sup>82</sup> study sessions offered by ICA Canada, each session is seen in the context of a leadership compass, which is an overall contextual guide through which to view aspects of leadership. You could see the compass as a diagrammatic image or chart of the book as a whole. The orientation session starts off strong with a dramatic story and shares the reflection process, which is rooted in the focused conversation method.

Before participants come to each study session, they read a chapter and review its chart it in their study guide with key questions. After this initial dialogue with the author, their time in the study session is focused on whole group work with the main concepts, and small group exercises that ground the key points in their lives. They share stories and wrestle with how they experience the dynamics of leadership highlighted in that chapter. The integration (decisional) level focuses on what difference this leadership dynamic makes for them. The last session of the course works through specific challenges people are facing in their workplace or lives, applying the insights from each chapter in the compass. This program has had a strong impact on participants, such as people

<sup>81</sup> Epps, ibid

<sup>82</sup> Stanfield, 2012, p 1

with all kinds of jobs in the University Health Network of hospitals. And through the process, people learn to reflect and see the impact of applying their reflections to their daily life. They see how to lead in their unique situations. As the former Senior Development Manager in Human Resources put it, "Everyone can lead from where they stand."

## Conclusion

The seminar method is a valuable tool for catalyzing thoughtful responses to provocative materials. It can enable deep learning from participants, while respecting the ideas and work of an author.