Part II - Reflecting in the field

Story, Form and Method

7. Questions of Participation and Perspective

Readers of the Merton Rule learning history, depending on their perspective, react to it in very different ways. A reader might in turn be surprised, annoyed, confused, bored or concerned by it. A researcher might be wary, noticing the inequity of how Adrian's account is presented and interspersed with boxes that contain the somewhat dampened perspectives of others who were involved. A community worker in a different field might be distracted by the need for all these different perspectives in boxes, bubbles and reflections. She might just love the story of the cat. An analytically minded sustainability person from the private sector might dwell particularly on the tabulated themes at the end linking them to his experience. A central government person might be upset by the way the main civil servant is portrayed as a baddie. A local authority person familiar with the Merton Rule campaign might be irritated by the grandstanding tone of Adrian's story. And a lawyer might notice the use of people's real names and check the account for libel! All the above examples do resemble characters in real life. They are based on real responses I have gathered from different readers of the Merton history.

In this chapter I will explore some of the dilemmas and challenges that arose from my design of a learning history in an open system. I will look particularly at how the central idea of learning history as a participative and inclusive process of celebration, inspiration and amplification raised tricky questions of power and responsibility in practice as those who participated each brought their own perspective to the process. The chapter will start with my early stance on the validity of the learning histories. I will then show how, by cycling out to the field and reflecting on that, I altered my view of validity as a result and changed the research process to be more inviting and inclusive. The chapter then goes on to discuss the questions of power and responsibility that arose from a second cycle of inquiry before finally drawing what has been learnt into some guidance for conducting research of this kind with responsibility.

Keeping Honest: Starting Stance

With an organisationally situated learning history several insiders are interviewed and the researcher produces an account where these diverse and sometimes contradictory voices are interwoven. There are difficult choices for the researcher who wants to stay true to the data and, at the same time, wants to create an engaging account. Though wider learning might best be served by honing in on a few key events that have dramatic content this might be at the expense of staying true to other events that are less dramatic but nonetheless significant. Roth and Kleiner caution the researcher against setting out what they call the road to demagoguery by cultivating a practice of staying loyal to the data. This requires a regular move from the 'mythic' to the 'research' orientation so the researcher can check she is not mythologizing as she writes.

> We realize that taking the mythic perspective may lead us to exaggerate the facts in service of the deeper truth. This can be a road to demagoguery. What, then, keeps us honest? The knowledge that sooner or later we must cycle back to the research orientation and check our 'mythic' assumptions against the data.

(Roth and Kleiner 1998 p.56)

In the organisationally situated learning history the researcher keeps herself honest by checking back to the data. And because that data represents multiple voices and perspectives it keeps itself honest. Usually many people will have been interviewed, so no one voice can run away with the story and get it to serve an individualist strategy for power or any other agenda. There are many voices and when the researcher returns the history to the organisation, this can sometimes, but not always, be a challenging moment and a source of learning when these different perspectives are reflected together.

With learning history in an open system I was judiciously spreading my resources across several organisations and conducting only one or two interviews in each. With this I expected that I would actually be evading some of the challenges previous researchers have reported with reflecting diverse voices at organisational level where debate over the facts or what is important can be a feature. With my single learning histories, as I

explained in Chapter 4, the challenge would be taking just one or two narratives that in themselves were coherent and engendering a mythic spirit with them. I would not have to arbitrate several narratives. In short I would need to make fewer 'mythic' assumptions across a set of varying perspectives. I would pre-empt the inevitable criticism that '*this was just one or two people's stories*' by arguing that in spite of this these stories, though unverified, had value in their own right. So by staying close to the data I would stay honest. But I would make no pretence that the data itself was checked for its honesty.

So my stance was that by *'naming'* the lightness of the single learning history I was avoiding the question of whether or not it was setting me on the road to demagoguery. I was arguing that it didn't matter. The story still would have the ability to inspire in a meaningful way. It was when I started to test this stance in the field that I had cause to think again.

Early warnings from the field

Once it was written I took the Merton history out to different audiences in the system as soon as I could. I was keen to start working in practice with those aspirations of 'inspiration and amplification' I described in Chapter 4. In May 2007 I presented it in a seminar at the Science and Policy Research Unit (SPRU) at the University of Sussex; in October 2007 I presented the story of it to a broader audience of sustainability practitioners at a conference entitled 'The Next Great Transformation' at the Eden project in Cornwall; and in December 2007 I narrated a multimedia version of it to MSc students in Responsibility and Business Practice at the University of Bath. What had been devised as a third-person intervention – as I saw it I was putting stories into the system - proved to be invaluable on other levels. The varied audience responses helped me to see the different things people valued or found challenging about the history. For example I started to detect quite early on enjoyment of the Merton story seemed more possible to those who were further away from it. The communicative power of the cat story that inspired distant audiences made others closer to home more sceptical. And it was by working early with Merton in the system that I was able to deepen the questions connected with my starting stance on staying honest. I show two examples below of how these questions started to deepen.

Feedback from SPRU

In May 2006 when I presented my work with Merton to researchers in SPRU they thoughtfully started to probe the researcher's role in research of this kind. One researcher in particular gave me pause to think. He posed a long question using an example from medical research, but in essence he was asking how I managed my instrumental role in this kind of action research:

I responded as follows:

> **MG:** …There is an element here to the story being presented as a success story and I'm becoming a mouthpiece for that story. Merton is viewed very differently in different places. There is always danger of being co-opted – the only way to deal with it is to be very clear about what one's position is – in other words to be clear that this is one person's perspective and to say I'm treating this agnostically.

> **Audience Participant:** And what happens when you are intervening in the social network and then it becomes perceptively more of a success as a result of your intervention and then you really are in there as a hero yourself….

> (we all laugh together)

<div align="right">Transcribed from a recording of my Presentation to SPRU, May 2007</div>

I reflected a lot on this exchange afterwards and gradually my starting stance began to crumble. Though I said I was treating the story of agnostically, in truth I was not. I thought that both the Merton story and Adrian were fantastic. I enjoyed amplifying and celebrating the story in the system. I felt a part of it. And in a way I needed to feel this way to take the story out and inspire others with it. But the SPRU exchange niggled. If I was enjoying Merton and feeling a part of it then surely I *was* becoming a mouthpiece for the story. In that case I was not agnostic however much I might claim to be. And in that case the possibility that I was promulgating one person's story at the expense of others' was starting to matter. The road to demagoguery could not be ignored – it needed to be considered and a second set of feedback helped me to do this. Coincidentally, as I

described at the end of Chapter 4, the evening of the SPRU presentation I met Thurstan, a sustainability officer from Brighton and Hove local council and agreed with him that he would be an early reader of the learning histories.

Coincidence?

I haven't linked the two before but writing it now I see a coincidence between getting feedback at SPRU and arranging that very evening to have Thurstan be my early reader of the histories. I think this is an example of working quickly and opportunistically to adjust the research strategy in the field (without coming out to reflection).

Feedback from the 1:1 work

Working with Thurstan further challenged my starting stance of just naming and framing the limitations of the histories. The first history I sent him – Merton – had several disclaimers at the front declaring it to be a partial, and incomplete story and that *it was to be read in that spirit.* I soon found however that Thurstan quite naturally read Merton in his *own* spirit! On the marked-up copy he returned to me, the tussles he experienced with elements in the story are plain to see. He already knew all about Merton, his local authority had already had a presentation on it that had not been that well received. In our debrief call he described how he had struggled while reading the history with his preformed views of Merton and of the personalities involved. True, this was one man's story, but he found the tenor of that story irritating in places. He went on to say however that the read had helped him to revise and round out his view of the story and of what had been achieved there. The strength of the personality in it was easier for him to accept in a form where a third party mediates it. Reflections in the text like:

> Did the story make the man, or the man make the story?

were, he felt, insightful and added distance. He felt that the history overall helped him to be more appreciative of Merton in one way whilst still being annoyed with it in another. This was a theme that would be repeated at the workshops and in workbooks I later gathered and one that will be explored more fully in the next chapter. The histories seemed to help readers into a place of relaxed paradox where opposing feelings could

more happily reside.

This early work I see now as an important validity step of checking the '*mythic assumptions'* of the single history just as Roth and Kleiner urge with the organisationally situated learning history. However here, it was not only my 'mythic assumptions' that were being checked but those of the protagonist. Though others read the history at this time, Thurstan's unique position in relation to the case and his existing knowledge about it, placed him perfectly to push against it. His mark-ups questioned the 'jointly told tale' from both sides. He pointed out several places where, in the text I had 'asserted' something I could not know for sure. And on the story itself he added several comments from his own experience of it. And his willingness to name his feelings in relation to the history yielded a first insight for me into the fact that the history will be read with the reader's frame of reference and not that of the writer's however much she might protesteth or proclaim. I had written a writerly text then, before ever I'd heard of Barthes. And Thurstan's responses helped me to see it as such.

Outlyers – institutional insiders play a vital role in assuring quality

Well placed "outlyers" (neither insider nor outsider) play an important role in checking the assumptions and quality of the individual history. Outlyers will be familiar with the case as it is perceived in the field and the stories that already circulate about it. Their vital perspectives help point out hot buttons and will help curtail a tendency for the researcher to get lost in the story of the history.

What I had not fully appreciated beforehand was the fact that the system into which the history was being offered was itself not uninformed and pristine. It contained actors near and far who each held a perspective on the Merton Rule and how it had come into being. To have validity the 'jointly told tale' that is reflected into that system needs to resonate to some extent with the understandings that already exist there.

Naming and framing the learning history for what it was had been a good stance from which to experiment. By inviting readers to comment on Merton I got useful feedback that helped me adjust my writing style so I could stay closer to the data and so produce a more valid piece of work. But this first cycle also showed me that my instrumental role in propagating the histories needed to be acknowledged rather than denied. I needed to

adjust my starting stance.

Keeping Honest: Adjusted Stance

My adjusted stance was that the learning history needed to have validity as a story _and_ as a representation of an occurrence involving other people. I realised that with an institutionally situated learning history there are actually two stages of validation. The first is a cycling back to those who have been originally interviewed. This can be quite straightforward: it is their story after all. The second stage is more challenging and provocative. It is a cycling back to the field of which the story is a part. This validation step is un-contracted and improvised and rich with ethical dilemmas, as care of the protagonist, the story and other stakeholders must be considered. The way I wanted to address that was by continuing to 'name' and 'frame' the lightness of the histories but to change the nature of the invitation that went with them and to work toward being more inclusive. The next section describes the changing nature of that invitation from what I had been previously offering: 'here is a story, what do you think?', to a new more participative and inclusive invitation of 'here is a story, what is your story?'

Changing the invitation

So my invitation became more pro-active over time. Just 'saying' in the introductory paragraphs that the history was open to comment was not enough without some process to support that claimed openness. As I met further 'outlyers' in the field I heard more stories about the histories I was charting. In response I sometimes added a quote into the history to deepen it. But this was still serving the story rather than telling a new story. And the question of those people named in the history continued to gnaw at me. Clinging to the ideas of celebration and participation I started to question how I set about inviting them in more pro-actively. "_What'd it be like?_", I wondered if we ran Merton by the people who are mentioned in it and asked them to comment. This felt important, obvious in one way, but edgy in another. I suggested the idea to Peter over coffee and I remember the thoughtful, quiet pause that followed. In that moment I remember mentally scrolling through the implications of doing something unsolicited and uncontracted at this point: for Adrian, for me, for the participants. Soon after, in a call to Adrian on a Friday

afternoon, I floated the idea by him. As I spoke I heard myself unintentionally reflect back to him his own words about the mood of a late Friday phonecall: "*Look I know it's Friday, and maybe this is a wacky idea…..but what'd be like if…we sent the histories out to the people mentioned in it and asked to use their names and gather their comment?*" Again a pause as Adrian mulled this over followed by a quiet – '*that'd be interesting*' or words to that effect. And so it started. I will now narrate an abridged story of gathering perspectives for some of the histories. I will then reflect on the implications of this. This story has been abridged to respect the privacy of some of the correspondence that took place.

Story of a key happening: gathering perspectives, June 2007 to Feb 2008

The idea of gathering perspectives now needed to be actioned and it was immediately a prickly area that I sometimes found myself reluctant to enter. Names and e-mail addresses were gathered from Adrian but I procrastinated on stepping into it all. As it happened I was completing the Nottingham history at about the same time as I was sitting on this idea of getting more perspectives on Merton. I had delayed completion of Nottingham, so that I could flesh out the early history with a second perspective from key innovator Steve Waller. During my sign-off with Steve we discussed the use of names and the need to seek permission particularly from one person who had been significant in the story. This person had come out well in the history and so our request, together with the learning history was merrily sent to him with an expectation of easy consent and, from my side at least, possible delight at the history. Consent was indeed quickly and supportively given; however delight was less forthcoming. The reply was cautious and questioning of how he was represented. This was a surprise to both Steve and I and one we discussed and handled. I cannot give more detail on this, but this first response was to set a pattern that would be repeated and an illustration of the simple human fact that people feel naturally sensitive about being described. And when politics and public life is involved, as they often are, that sensitivity is magnified. The experience with Nottingham had made it all the more important that I should gather perspectives with other histories, but it also made me more cautious. I drafted a letter very carefully, reviewed and revised it with colleagues (see Appendix C) and then, in mid-October 2007, with a deep breath I started to send it out to people close to the Merton history. One immediately replied denouncing the history and wanting no part in it. My stomach lurched as I read his mail. A series of e-mails then unfurled over a period of months. These culminated in a flurry of communication and re-negotiation in Feb 2008 in the final hours before I was to send the Merton history to print in preparation for the learning history workshop.

I cannot share the details of this exchange but can describe my feelings in relation to it. As e-mails with a bundle of feelings, facts and recrimination were shared, I felt I had lurched off-piste with the research. Each time I responded to an e-mail I thought hard and carefully. I needed to learn quickly how to make good decisions. In my journal I wrote some of the principles that seemed to be emerging from that thought and experience. The key realisation was the need to hold a position that was transparent and non-judgemental that somehow stayed true to all the stories however incompatible these might seem to be. To achieve that I needed to be vigilant as to the motivations for my decisions and to box up any views of the personalities I might be inevitably forming through the e-mail exchanges.

 Journal entry, Feb 13th, 2007: emerging learnings

When I put the researcher hat on, the views I've formed of the people involved and their way of working fade away. When I'm clinging on to the form of the research and what I'm trying to do it makes decisions much easier. Here are some of the emergent principles and learnings.

1. Check for bias (positive or negative – usually indicated by having a view of the personality in my head)

2. Check am I drawing on pop-images of a person rather than on what they're saying

3. Check am I 'entering in' to things as some kind of judicial magistrate– thinking who's right or who's wrong – this is a sign of using power (and am I enjoying that?)

4. No-one's wrong. Never change the story at the expense of someone else's

5. Check for perspectives motivated from feelings. If feelings are there represent the feelings alongside what they say (e.g. an "appalling misrepresentation" becomes "x felt this aspect of the history didn't do justice to….").

The line I adopted of not changing one story at the expense of the other, of putting feelings in where appropriate, of adding details but not so many as would blur the story held me steady. Like a broken record I repeated it over and again and finally at the end of this exchange there was a moment of capitulation from all involved. The history was agreed.

Journal Entry, Feb 14th, 2008: Catharsis?

In the morning (after the night before) it feels like things have settled. I am feeling wobbly – really tired with all the preparations for the workshop and not sure I can handle another wave. I come in and there is an e-mail from one of the participants who's been quietly watching the storm. I wonder wildly is he now going to retract his history and sigh with trepidation as I open his mail. But he is simply confirming that he agrees to the final copy. And signing off he writes:

> I wish we could have met. Judging by your emails, and the story, it sounds like very interesting academic work that also leaves you well-skilled in managing hornets' nests! ☺

In my mind, on reading this, I put my head in my hands and sob. As I don't have time to really sob, I get on and give the kids their breakfast. Over breakfast a few more mails come in from the other participants – each agreeing to the history, sometimes apologising for their reactions or the use of strong terms here and there. The storm is over. Perhaps there has been a catharsis. Who knows? Maybe I'll ask them all about it in the years to come. Andy (my husband) calls from Croyde where he is surfing. I tell him what has happened – 'how are the conditions?' I ask – 'the sea is calm he says but there is some surf". I feel something important has happened.

Story's end.

The events above erupted in the lead-up to the workshop – an unwelcome distraction at the time from what I saw as the central piece of the research. However the perspective gathering in general, and the Merton eruption in particular was one of the richest events of the research that drew forth – necessarily – some rapid learning on my part. So my experiences in the field helped me to deepen my understanding of what I was doing, refine my practice and it raised some new and interesting questions. Drawing on this story I will reflect on these new questions that were centred on the twin issues of power and responsibility.

Reflecting on Perspective Gathering

Issues of power – practices

I had set out to gather perspectives so as to provide balance to the learning histories and to validate them back in the field from which they came. I hoped this would deepen the histories, make them more inclusive and that overall this would lead to the research being more participative in its approach. However reflecting on the story now I realise that my strategy for being inclusive was not even-handed. The manner of the late invitation naturally privileged the protagonist over the latecomer. The latecomer was invited to tell his or her story in relation to the protagonist's story and not on his or her own terms. There was then what I called a power-frame into which the recipient of my well-meant invitation might be led. This power-frame suggested that researcher and protagonists had a jointly told "history" that was already legitimated to have value and the latecomer was kindly invited, from a more diminished position, to add something to that.

I learnt from the Merton round of perspective gathering to be aware that the late invitation conveys an implicit message of whose story counts on quite a fundamental and emotional level. The practice I developed as a result was to attempt to redress that view by being understanding of hot emotions, making time to hear what was said and refusing to enter into arguments over whose story counts but to try instead to include perspectives. Later, when signing off another history – let's call it history X - I received a strong emotional reaction from a late invitee who was shocked not to have been included in the interviews and asked for the history to be rewritten. When this happened I was no longer as emotionally thrown as I had been with Merton. Now familiar with the reaction I knew I needed to acknowledge the feelings and stay steady. Having explained the nature of the research more broadly and pointed again to the framing section at the front, I went on to say:

> However all that being said, I understand your reaction and I'm sorry not to have explained properly the context of what I'm doing. I can imagine that no matter what the doc says about it being a partial account, if you open the document about a project that you have been heavily involved in and see other people featured and not yourself it is a shock and

on some level it might make you feel excluded.

Having named the possible feelings, I went on to invite and include his perspective. The cycle completed very well with his perspective added and the history is now being widely used in his organisation. In this case worries about power, position and importance were successfully re-framed through careful and caring explanation together with a repeated invitation to voice a perspective. This re-framing is the nub of addressing the power issues implicit in the piece. Comments about power and importance are drawn from a frame that learning history is trying to transcend. If the researcher steadily refuses to enter into that frame, participants can, I think, be coaxed out of it and into a safer space where, celebration of diverse perspectives might at last be possible.

Coaxing out of the power frame: a second-person practice

The historian needs to cultivate a second-person practice that coaxes the co-participants out of frames of ownership and power that naturally arise with learning history. This practice involves a steady re-iteration of the story's value, its openness to being enriched/deepened and the repeated invitation for new perspectives.

The researcher's 'steady refusal' to enter into the power frame is, as the Merton story shows, not as clear-cut a practice as it might sound and as the last bit of that story shows it took its toll on me (e.g. "I feel wobbly"). The vigilance I mentioned in the story was not about preventing me stepping into the power frame, but getting me out of it fast enough so I could respond with equity and unencumbered by my own issues. For example when the participant in history X above first responded he wrote:

I don't have time to rewrite it in the time scale you have given below, so suggest that we delay the issue

I remember my mental response went something like: "Oh no! – I'll have to rewrite" followed swiftly by a teenagery shrugging: "wait a minute….you can't make me!". Not

exactly a mature response. It was from a place where I felt diminished and wanted to fight back. So I was in the power frame myself. When I did respond it was from a very different place where we were all participating on an equal footing, sharing our voices and concerns.

 Resisting the Power Frame: A first-person practice for the learning historian
Resisting the power frame is a micro-practice too for the learning historian who needs to be watchful of her emotions and feelings of diminishment which can be a sign she is now unhelpfully in the power frame and would do better if she was out of it.

Two years earlier I had wondered how I might achieve "dispassionate passion" in the research. It was in this phase that it started to dawn on me that this was possible – I could simultaneously hold both passion and dispassion in the same moment. It did not feel duplicitous. It felt ok.

 Dispassionate Passion: A lived experience
Holding onto one clear decision-making framework helped guide me even though there were moments I held strong and passionate emotions, reactions and attachments.

This then is a reflection on the practice I developed to support the round of perspective gathering with Merton in order to '*keep me honest'* and to help me and participants away from frames of power that will undermine a process intended to be open, inclusive and participative.

Not all latecomers took the invitation badly or perceived it as a statement of power. Some were very pleased to be asked. But the voices that were added afterwards were muted and shaped by the frame of the narrative that was already set. One participant in Merton had written after his first read: 'I do not recognise myself fully'. I needed to then reshape the narrative sufficiently so he did. Generally the quality of input from these participating readers differed from that of the protagonists. Later perspectives were added often by e-mail and were more akin to wary reportage than to the stories I had requested. In the Merton history, Joanna Collins' enumerated description of her role (see p.38) in building the campaign is typical. I reflect now that this is not surprising. My

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request for stories *had simply not made sense.* Participants quite simply translated the request into something that did. Their responses were often accompanied with a question '*is this ok*?'. So a 'joining in' did take place, and though many participating readers were pleased to be approached, the way in which it took place was not adequate to draw out the virtual storytelling and celebration for which I'd hoped. So the quality and level of participation was mitigated by the way I conducted the research and the power issues implicit in that. I had learnt that I could not impose the frame in which a history would be read. Nor could I always coax a reader away from an interpretation they chose to make. Practices to avoid live power issues had been learnt, but because the levels of inclusivity varied for participants there were wider issues of responsibility I needed to consider.

Issues of inclusivity and responsibility

My approach to being inclusive raised questions of how I might be responsible to participants. During the Merton perspective gathering I addressed the power issues that arose by improvising and learning as I went along. And in the end it seems to me that something important did happen. The Merton perspective gathering did bring us to a point where painful events were surfaced and I felt safely voiced.

> The learning historian tries to do the same thing the mythic dramatist did –
> relegate deeply painful events to a form where people can safely undergo
> catharsis

(Roth and Kleiner 1998 p.56)

However this might easily *not* have happened and the history might have simply supported a deep-seated pattern of hurt and suppressed voice. I did not deliberately orchestrate catharsis like a mythic dramatist creating safety for people to go to difficult places. Rather I tried to limit damage and retain integrity when painful events started to surface. Had it been a responsible thing to do? Or how might it be made safer?

As a researcher I felt a responsibility both to participants and to the research. But there was a tension in how I was working. On the one hand I wanted to celebrate the learning history stories so that they might inspire others and affirm those who had been involved;

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on the other, I wanted to break them down – say there was nothing special about them - offer them out for comment and accept other stories alongside them.

With this institutionally situated learning history, I became aware that just as there are two levels of validation required, there are also two different levels of responsibility. I was responsible to those protagonists who had shared their stories in good faith to treat those stories with respect and care. But I also had a responsibility to those back in the organisation and in the wider field to treat those stories with just enough respect, and no more respect, than anything these other participants might have to tell.

My adjusted stance of being more inclusive seemed to work well at the institutional level. At the learning history workshop participants from across the institutional field were encouraged to voice their often contradictory feelings in response to the histories.

Figure 31 Geoff invites participants to voice their feelings in response to the 'iconic' learning history stories

They were then invited to share their own stories of innovation and these were included alongside the histories as part of the joint learning history. In this way the power of the iconic story was broken down and in a way democratised. And the surfacing and voicing of tensions, struggles and dissent – so important for learning – was occurring just where

it should – at the institutional level. Subsequently I added the comments, questions, stories and reflections of these institutional players to the website. These went alongside the histories and so lent them validity as well as demonstrating the openness of the process. This inclusivity of institutional actors worked well then on multiple levels.

But what then of the protagonist and those involved in the story that is being broken down and equalised? Where were they in this process? Returning to Merton, I e-mailed Adrian shortly after the perspective gathering eruption unsure of what value there had been in this process for him:

> I don't know what to say about the feelings this has dredged up. There clearly are power issues over who owns a history - in any family even. But I really have to think, as a researcher, of the validity of gathering perspectives in this way i.e. after the fact. The research is meant to 'have value for participants' - is there value in this I wonder?
>
> <div align="right">E-mail to Adrian, Feb 2008</div>

Adrian did not reply and at the workshop I asked him this question again. He replied with a laugh and words to the effect:

> There was no value in it whatsoever! It was a mess!
>
> <div align="right">Adrian, at the learning history workshop, Feb 2008</div>

However of the workshop, where he had witnessed others working with the Merton learning history – and often challenging it - he had said how great it was to see people really engaging with the story:

> They're intrigued by it; they want to know more about it.
>
> <div align="right">Adrian, at the learning history workshop, Feb 2008</div>

So though the gathering of perspectives closer to home was seen to have no value for Adrian, the inclusivity at an institutional level was rewarding for him and in a way that spoke exactly to the mood of 'joining-in' and 'celebrating' that I had been seeking to create.

Careful contracting and re-contracting I think, ultimately fulfilled my responsibilities to protagonists as the research unfolded. With Merton, I had needed to step back from my

relational position with Adrian and put my admiration of him to one side when I then needed to contract belatedly with latecoming participants who had originally not contracted with me. To these latecomers I also had responsibilities.

Responsibilities to institutional actors were also fulfilled by inviting them to voice and share their thoughts and emotions and stories. By valuing these voices as much as the iconic stories the research was more inclusive. These participants can still get value from the story irrespective of its closeness to the 'full truth' and were unconcerned if there were limits in its scope or if aspects of it had been omitted.

Responsibilities to those who had a stake in the histories, those who had played some role, were I think only partly fulfilled. For them the history mattered. Not all perspectives were gathered and those that were included were muted in relation to the central history.

Overall learning histories are kept honest by being open and inclusive and there are responsibilities to be considered as to how this is done. Norms will tend to guide participants to translate unfamiliar aspects of the approach into a familiar frame. Acknowledging and working with the different frames in which the learning history might be understood is vital to guide the learning historian to a responsible practice.

Guidance for a Responsible Learning Historian

My reflections of the previous section help me now to articulate some guidance as to how to conduct this kind of learning history research - that is participative and multiply voiced - in a responsible way. Were I to do it again my main recommendation to myself would be to step more clearly into the role of learning historian with the individual histories. Like it or not, by interviewing and then writing a history about a project, I had temporarily elected myself, unasked as the learning historian of that project. How I might don that mantle and later take it off was a question to be considered, and you can see me considering such questions in the earlier Merton story when I found myself mediating between different actors. But the error I had made initially was thinking I might shirk that role altogether on the basis that this was just one story. With Merton, and two other histories, as soon as I started asking for perspectives, I found myself in the role of historian whether I liked it or not. There was barter over the 'facts', there was contention over the 'history' and this was channelled through me. Ultimately reflecting this unspoken role, I found myself invited to events about the Merton Rule and celebrations of Southampton District Energy Scheme. Had I stepped into the learning historian role from the outset, the contracting might have been clearer. I would have felt a clearer responsibility to collaboratively create a storyline and timeline of key events. This would have, at a minimum, been a frame into which participants could feel comfortable to speak their various perspectives. But there is a trade-off. The beauty of the approach I adopted is its light touch and its insistence that the story will and never can be complete. I am torn, even writing this now, between two conclusions. One suggests it would be best to revert to the standard learning history approach of a collaborative and participative pre-planning step to negotiate the timeline and key events. The other conclusion suggests that the attention instead should be diverted to further improving the practice of constantly opening up the history. A meeting to identify and negotiate key events might still suppress voices and support a prevailing single narrative. Whereas a more careful, well-judged and timely practice of opening up the history could put participants on an equal footing whilst at the same time resisting any sense that there is only one story on which we must agree.

For example had I been more watchful of Merton I would have noticed that part of the early history was described second-hand. I then might have invited actors into the story earlier or else confined the span of the history to the events described first hand. Or I might have sketched out the key participants earlier and devised an approach to invite them to contribute to the narrative frame of key events. With my experience now I would be aware at least of the dangers implicit in what I came to call "red-button" phrases (e.g. 'cobbled together') that might add to the colour of one person's story but implicitly detract from the story of another. Some of this practice I started to develop as the research unfolded. In later histories I was more careful with the storyline and in the case of Nottingham and Southampton went back to conduct further interviews to fill out gaps in the history. With Kirklees, my contact approached all the key actors and invited them to participate in the history. When only two replied, I scoped the storyline to fit what I had. Incompleteness was obvious with the history but the invitation had at least been issued. And finally I learnt to be careful with participants. Perspective gathering was re-contracted and carried out in accordance with a feeling for what it was we had agreed. This sometimes required a judgement on my part as to the different purposes it served. With Merton the exercise was understood to be edgy and of mutual interest. Adrian was 'up for the experiment'. With Barnsley the exercise was more about rounding out the story. I deliberately chose not to pursue multiple perspectives too much in this case. I judged then each case individually as to how far to push the breaking down and equalising of the iconic story.

Guidance for the responsible learning historian

Accept the role of historian and the responsibilities it implies

Collaboratively create a storyline and chronology of key events

Name, invite and include paying attention to the following:

- The history may be read in a spirit different to your intention.

- The timing of the invitation is important.

- Everyone's story is important.

- Constantly be watchful of the notion that this is not the case.

I have proposed in this chapter that responsibility is not addressed, but rather it is approached by cultivating practices within the role of historian that include watchfulness and judgement. I have reflected on some of the practices that might have led to the cathartic effects of the Merton history occurring in a safer way and I have pointed at some of the judgement calls that working in this way necessitates. I have caught myself almost falling back on wide-netted participation as a salve to responsibility but realised that this alone does not address issues of power; indeed it might play into them. Rather it is the manner and timing of the invitation to participate and the quality of that contract that requires attention so that the learning history reaches its potential for aspirations of celebration, participation and diversity.

Through the Quality Lens

Let me briefly check the quality criteria that were set out in the last chapter. The whole round of perspective gathering was an expression of **quality as watchfulness** over research choices that resulted in an ultimate rejection of the original choice to conduct single, less negotiated histories. The thread of watchfulness goes right through the descriptions above. The passages above describe how **watchfulness** as a practice is developed further on the hoof as feedback started to come in from the field. I became alert to the different kinds of reaction and alert too to my own differing reactions in the face of that. And as a result I became more careful with the writing of the history itself, watchful of hot-button phrases, mindful of emotions.
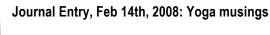
The invitation for feedback early and often from the field fits well to the description of '**quality as checkpoints and evaluation'** and I think the above shows a willingness to work with that feedback. My '**quality as achieved alignment**' is illustrated by how I worked with and tried to heed feedback that essentially was disconfirming my strategy. So I went back and tried to adjust my four territories of experience trying to get them to line up. At the workshop and with the perspective gathering of learning history X they did seem to line up. But I had learnt how to do this by noticing an initial misalignment. And what of '**quality as postheroic narrative'**? In the passages above I have presented a piece of research that was flawed but that had quality too. In the sensemaking of it I have tried to walk that line between deprecation and triumph – a challenge for me - in

order to reach some sensible guidance as to what might have been done differently to improve my practice. And finally there are many examples of **"quality as brave consequence"**. Consequence was faced with the gathering of perspectives and the use of real names in the research. This was not the easy thing to do. And in some ways it opposes ideas of ethics and identity protection. I have described above how the unexpected impact of what I was doing meant I did not contract properly with early protagonists and overall with the participating readers. So on account of being willing to bravely face the consequences the research did fall short on transparency and what I articulated to parts of the field was at times lacking. This was simply because I didn't know what was going to happen and a practice I started to develop was the sharing of my vulnerability in relation to that with participants (for example in my e-mail to Adrian questioning the validity of what I had done). On the other hand, driven by the **"nebulous idea of integrity"** I constantly tried to hold on to principles of treating each participant with respect and dignity. And so the consequences of the research – expected and unexpected - were being faced with some integrity albeit sometimes with a wince.

Concluding

In this chapter I have described how some early experiments with the validation of the institutional learning history blossomed into an inquiry into power and responsible practice. The idealistic notion that learning histories would be a site for celebration met with a realism in the field from which came challenge, insight and learning for research of this nature and for my own practice as a researcher. This chapter has described an opening up of the histories for participation. With its emphasis on digging into the implications of doing that, the writing has probably evoked that opening to sound more like the creak of a can-opener on the lid of a rusty can of worms than the clean pop of the cork on a celebratory bottle of champagne. However the clean pop of celebration was also there, as the earlier chapter on the workshop will have highlighted.

 The opening up of the histories in turn moved my own thinking on in terms of what working with these histories seemed to imply. I found myself moving further and further away from absolutes:

Journal Entry, Feb 14th, 2008: Yoga musings

During yoga I wonder is it unfair of me to be trying to impose this postmodern view on unsuspecting participants. Over and again I say to them…"trust the reader – he/she will see all those perspectives and draw his own conclusion", "it's ok to be ambiguous": but the participants still react. I reflect that I actually don't believe any more in 'lies' or 'truth' – that what I'm saying to these people is, "there's no such thing as the full truth or a full lie, there's only memories".

And a month later, in April 2008, when I met with a friend James and told him the story of what had happened with gathering perspectives in Merton, he commented:

> y'know when you describe that work to me I'm thinking of how useful this
> would be for diversity training at [the large multi-national where I work].
> It's so important to really get people to understand and accept different
> people's perspectives

<div align="right">1st April 2008 – Late night conversation with James</div>

His comments contributed to my deepening sense that the pluralist aspect of this learning history was as important as the stories themselves. The next chapter will carry on in the direction in which this is pointing by going into a discussion of diversity and postmodernism and the question of just what a learning history is.