

**An Investigation of Learning Processes and Contexts
of a Curriculum Program for the Formation of Spiritual Directors**

Submitted by

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Declaration

This thesis contains no material that has been accepted for the award of any other degree or diploma in any university or other institution and, to the best of my knowledge and belief, it contains no material previously published or written by another person, except where due reference is made.

The ethical principles and procedures specified by the Australian Catholic University's policy document on Human Research and Experimentation have been adhered to in the preparation of this thesis.

Signed

Date

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Abstract

In recent times Spiritual Direction has grown in popularity amongst lay people seeking to nurture their own spirituality. This trend has given rise to an increased enrolment of people seeking to train as Spiritual Directors. This study aims to identify key factors underpinning the learning processes in a spiritual direction curriculum program that is part of a graduate course offered by an Australian University. Having identified the factors, the researcher will assess its effectiveness in forming spiritual directors, from the perspective of participants involved in the program.

This qualitative study was based on the insights of adults who are already qualified spiritual directors trained in this particular spiritual direction formation program or are current participants in the same program. Their perceptions of the course were drawn upon to investigate the impact of their curriculum program on the formation of spiritual directors. Unstructured in depth interviews were utilized to gain the perspectives of participants. The original principles of grounded theory (Glaser & Strauss, 1967) were drawn upon to identify, conceptualize and analyze key insights into the learning processes associated with one spiritual direction curriculum with a view to identifying an emerging theory. Based on the emerging theory, this timely study aimed to ascertain the implications for improvement of both the design and delivery of learning processes within spiritual direction courses, and ongoing professional development offerings.

The findings indicated that the approach to formation was enhanced by the development of collegial, interactive learning spaces in which participants' relational qualities were influential in shaping these spaces. The qualities of trust, openness, vulnerability and integrity were identified as the core relational factors that contributed to the enhancement of the interactive learning spaces generated between the participants. Contemplative processing of learning was extended when participants adopted these relational qualities when reflectively and critically engaging with experiences. Used in combination with the principles and processes of *Lectio Divina* (Binz, 2008) and *Theory U* (Scharmer, 2009), participants' relational qualities promoted the broadening and deepening of the formational learning process. The influence of formators was significant in demonstrating the application of the relational qualities in the way they taught and participated in the learning process. The formators continued to maintain their authority and leadership of the learning process in conjunction their enactment of the relational qualities through collegial

engagement. The promotion of a range of approaches to safety resulted from participants' willingness to cooperatively apply the qualities of trust, openness, vulnerability and integrity with each other within the diverse learning community.

Based on these findings, the implications of the emerging theory were presented that offer ways in which these findings can be applied within a range of formation programs to enhance participants' learning opportunities. One recommendation for further research focused on the possibility of exploring spiritual direction formation programs associated with other traditions or which have a different emphasis. Another suggestion for further research would be to explore spiritual direction formation programs from the formators' perspective.

List of Key Terms

Adult Learning refers to the approaches to learning that account for the accumulated knowledge, experience and skills that mature aged students bring to the learning process (Jarvis, 2015). These approaches incorporate awareness of a range of elements of experience including cognitive, sensate, affective and spiritual aspects.

Collegial, interactive approaches to learning refer to cooperative group engagement in interchanges that involve mutual participation in the learning processes.

Contemplative Education is a term used to describe approaches to education that draw on the principles and practices related to deep reflective and reflexive processing of curriculum.

Directee describes a person who is the client or subject of a spiritual direction session.

Formation denotes the process of training and preparing a student or participant, using a range of means for vocational or personal engagement relating to a specific field of endeavour or interest.

Formator refers to the teacher or facilitator that guides and accompanies people in the process of formation.

Intensive course format describes the grouping of formal learning sessions into short, concentrated learning opportunities that occur over a couple of days at a time rather than on a weekly basis.

Intersubjective defines the interactive relationship between two or more persons as part of an exchange of ideas or experiences. *First person intersubjective* can be understood to be the interactions between persons who share common views or perspectives as the basis of their interchanges (Wilber, 2000). *Second person intersubjective* refers to exchanges between people who do not necessarily share the same views or perspectives in relation to their engagement with situations or experiences they are discussing (Gunnlaugson, 2009).

Objective refers to the observation or discussion of situations and experiences that are considered from a detached or distant perspective and is often expressed in third person terms.

Participants, in this study, refer to the students or trainee spiritual directors in the curriculum program.

Peer groups are the groups of participants that are intentionally grouped as part of the supervision process in the spiritual direction course to encourage dialogue and critical feedback in the learning process.

Subjective relates to the observation or discussion of situations and experiences from the perspective of the person recounting their experiences and tends to focus on the non-observable aspects such as feelings, emotions, sensations and beliefs. This perspective is often expressed in first person terminology.

Supervision refers to the oversight of participants' learning as they reflect on experiential and written accounts of practical sessions both in the formal aspects of the course and beyond.

Spiritual direction is the vocation of accompanying directees in their reflection on their life experiences and supporting them in becoming aware of the implications of these experiences on perceptions of the spiritual aspects of their lives. The vocation has also been described as spiritual companionship, soul friendship and spiritual guidance.

Spiritual director is a practitioner in the vocation of spiritual direction who accompanies or guides directees in reflection on their life experiences.

Triads or quads refer to groups of three or four participants engaged in practical spiritual direction experiences within the course. These groups consist of two participants who take on the role of spiritual director and directee and the rest of the group, including a supervisor, acting in the role of observers.

Verbatim describes a written report of a conversation or spiritual direction session that recalls a detailed account of a segment of the dialogue that occurred within the session.

List of Abbreviations 1

AECS	Australian Ecumenical Council for Spiritual Direction
CGT	Classic Grounded Theory (Glaser, 1998)
CRI	Cross-racial interactions
PET	Participatory Engagement Theory
PRLM	Participatory Reflective Learning Model
KELT	Kolb Experiential Learning Theory (Kolb, 1984)
UD	University of Divinity, Melbourne.

Chapter 1 Introduction

1.1 Background

The practice of spiritual direction has been part of the Christian Churches' history since about the fourth century. Throughout the centuries since its emergence, spiritual direction became increasingly associated with the role of male clergy and religious leaders up until the Second Vatican Council (1962-1965) (Ruffing, 2011). The changes that resulted from this Council contributed to a gradual shift in the perception of who could be a spiritual director within the Catholic Church (Smith, 2014). This led to an opening up of the practice of spiritual direction to non-ordained practitioners of both genders. This shift has brought about a growth in the number of spiritual direction formation programs available for training lay and religious participants in a range of academic and community based settings (Graham, 2011). This development has led to the need for the cultivation of programs that train potential spiritual directors in the essential nature of spiritual direction and the provision of effective approaches to forming future spiritual directors. Given the limited research in this field of enquiry, this study examines, from the participants' perspective, a spiritual direction formation program within an academic context.

The study proposes a theory that could inform the development of current and future formation programs. Based on this theory, the study also outlines a set of implications for the design and development of future curriculum programs. The following sections provide an overview of the background pertaining to this area.

1.1.1 Historical perspectives of spiritual direction formation.

With a history that goes back to the early centuries of the Christian Church, spiritual direction has developed as a means of supporting people in awareness of spiritual aspects that impact their lives (Meeko, 2002). The practice of spiritual direction grew within the early monastic movement of the Eastern and Western branches of the Christian Church as a means of training and forming novices (Ruffing, 2011). In the Middle Ages, the concept and practice of spiritual direction broadened to include the guidance of lay members of the church and some women became recognized as spiritual directors (2011).

Over the centuries, distinct streams of spiritual direction evolved including Benedictine, Franciscan, Ignatian and Carmelite approaches (Vest, 2003). After the Council of Trent (1545-63), there was a shift away from the focus on the breadth of experience to a more narrow preoccupation with confession and penitence (Houston, 2011). This resulted in spiritual direction being identified predominantly with the role of the ordained clergy within the Church. This meant that spiritual directors were in large part male clergy or members of religious congregations within the Catholic or Orthodox churches. There has been a shift since the Second Vatican Council back to earlier perspectives of spiritual direction (Ruffing, 2011). This shift in perspective has led to women and lay members of the church becoming involved in the practice of spiritual direction as spiritual directors (Smith, 2014). The result has been the development of training courses, known as formation programs, specifically established to train spiritual directors apart from the recognized pastoral and religious formation programs (Houston, 2011).

In the last few decades, women and men from the breadth of Christian Churches and other faith traditions have trained and now practice as spiritual directors around the world (Ruffing, 2011). This has led to the proliferation of courses set up to train or form spiritual directors in a range of contexts and geographic locations (Holgate, 2014). Within the Australian context, there are approximately seventeen registered spiritual direction formation programs across the country through the Australian Ecumenical Council for Spiritual Direction (AECSD, 2015). These include programs supported by Catholic religious orders, Anglican Church groups, ecumenical centres and some universities. In the United States, as well as those traditionally involved in formation within Christian Churches, programs have also been developed by Jewish, inter faith networks and non-aligned spirituality centres (Ruffing, 2002).

As a result of the rapid expansion of this practice beyond its traditional roots, numerous books and articles have been written on the understanding of the practice of spiritual direction (Barry & Connelly, 2009; Buckley, 2005; Frager, 2007; Bumpus & Langer, 2005; Nouwen, Christensen, & Laird, 2006; Ruffing, 2011). These have focused on specific aspects of the practical and theoretical elements of the practice in various contexts. They reflect a variety of historical perspectives and traditional understandings of the vocation (Ruffing, 2002). A peer reviewed international journal, *Presence: An International Journal of Spiritual Direction*, has been set up by *Spiritual Directors International* to provide an outlet for those engaged in writing about and researching the practice.

Various religious traditions have developed spiritual direction practice in line with their visions and missions. However, there are some core philosophies and scholarly principles that distinguish spiritual direction and its approaches to formation from other human services and helping professions.

1.1.2 Philosophies of spiritual direction formation.

The term spiritual direction formation has been used to describe the process of training participants in the practice and vocation of spiritual direction. Formation is referred to as a process of assisting participants in deepening their awareness of the various aspects of their lived experience including the intellectual, sensate, emotional and spiritual elements of life (Brown, 2013). As part of a structured training program, spiritual direction formation involves the integration of these elements into an understanding and practice of accompanying people as they deepen awareness of their experiences of life (Brown, 2013; Palmer, 2007). One of the key distinctive aspects of formation was that it was considered to be a long term process in which learning occurred over time (Brown 2013). The emphasis on the awareness of the range of aspects of experience highlighted the need for a range of approaches to enable integration.

The diversity of spiritual direction formation programs emerging in various contexts and traditions has raised questions about what constitutes an appropriate approach to the formation of spiritual directors. Spiritual direction practitioners and formators, who train those studying to be spiritual directors, have explored a range of curricula and adult learning approaches to identify what they believe are the most effective means to train spiritual directors. *Adult Learning* refers to the approaches to learning that account for the accumulated knowledge, experience and skills that mature aged students bring to the learning process (Jarvis, 2015). These approaches incorporate awareness of a range of elements of experience including cognitive, sensate, affective and spiritual aspects.

Four main perspectives have emerged from these ongoing discussions that conceived formation as: a discernment process, an apprenticeship process, training within particular traditions or helping professions, and an academic program. In the following sections, these perspectives will be briefly explored.

1.1.2.1 Formation as a discernment process.

In religious communities, spiritual directors are often identified as people with a charism or gift in the ministry of accompanying others in their spiritual journey (Holgate, 2014). Based on this assumption, Holgate (2014) argues that the role of spiritual direction formation programs is to assist participants to discern their gifts for the ministry. In the process of this discernment, participants would be practically engaged in doing spiritual direction to develop skills appropriate to the application of their gifts in spiritual direction.

Another focus of discernment related to the participant's faith and lived experience of God (Marsh, 2014). For participants to guide others in their experiences of God in everyday life, Marsh (2014) argues that they are required to have experience God in their life circumstances. By this he means that participants need to have related their experiences to their awareness of God to be able to accompany others in similar circumstances. These assumptions are based on the understanding that spiritual direction focuses on the experiential awareness of religious aspects of a person's spiritual journey (Barry & Connolly, 2009).

The focus on charisms and faith perspectives of the participants suggests that spiritual direction formation is a process of refining and developing preexisting skills and experiences. From this perspective, prior experiences and knowledge take on more profound significance in assessing applicants' suitability to enter spiritual direction formation programs (Holgate, 2014; Marsh, 2014). While this perspective reflects elements of spiritual direction practice, there are other approaches that speak to the process of training and formation such as the apprenticeship process.

1.1.2.2 Spiritual direction formation as an apprenticeship process.

Apprenticeship refers to the process of skill training where an experienced practitioner accompanies an inexperienced trainee, an apprentice, in modeling and teaching the skills of a trade or profession. In advocating this approach to spiritual direction formation, Nicholson (2014) suggests that this best described the model of traditional formation that has existed through the centuries. He contends that formation takes time and requires trainees to gain extensive and varied experience under the supervision of an experienced spiritual director.

The experienced practitioner regularly oversees the participant's practice and critically guides and teaches them in the process. As Nicholson (2014) observes in relation to his own

experience of this model of formation, it requires both “a long and slow process” (2014, p. 83) of training and considerable human resources to enable ongoing supervision to be maintained. The latter point has led some to argue that this model of formation is “elitist” (2014, p. 85). This is based on the understanding that only a certain group of people would have access to such intense and intentional personal supervision by experienced spiritual directors for long periods of time.

The advantages of this approach are that it provides trainees with more than just knowledge and skills. This approach also enables participants to receive direct feedback on some of the more subtle aspects and the nuances of spiritual direction practice that can only be learnt with time and practical experience. These aspects are more accessible through supervision with an experienced practitioner. The focus of this approach is on the practical development of the vocation of spiritual direction. The term vocation refers to the personal commitment to the philosophy and practices of a particular profession or occupation. However, spiritual direction is also a vocation that relates in theory and practice to other helping professions as outlined below.

1.1.2.3 Formation as a dialogue between spiritual direction and other helping professions.

Prior to the emergence of human sciences such as psychology, pastoral counseling, and other therapies, spiritual direction was considered one of the avenues in religious communities to address personal issues relating to experiences of everyday life. The development of other helping professions has, in recent times, influenced spiritual direction formation (Bidwell, 2009; Harborne, 2012). This is particularly the case in contexts where communities have experienced significant trauma such as in South Africa (Paulin-Campbell, 2014). There are also situations in which those seeking spiritual direction are struggling with specific mental health issues that may require a level of professional assistance than spiritual direction can provide. These situations highlight the need for spiritual directors to be conversant with how spiritual direction fits within the broader suite of helping professions or human sciences (Paulin-Campbell, 2014).

Looking at spiritual direction formation from this perspective, Paulin-Campbell (2014) proposed that training of spiritual directors required a basic understanding of psychological concepts such as “transference and counter-transference, and also (keeping) clear boundaries in the relationship” (2014, p. 36). Engaging in a dialogue with other helping professions does

not suggest an assimilation of these professions into spiritual direction practice. The perspective that Paulin-Campbell (2014) offers is an awareness of the wisdom of other professions while maintaining the distinctive focus of spiritual direction and its place within the broader helping profession field.

In line with trends in other helping professions, the formation programs for spiritual directors have moved towards being incorporated into academic programs.

1.1.2.4 Formation as an academic program.

Traditionally spiritual direction formation has been taught apart from the purely academic environment (Marsh, 2014; Nicholson, 2014). The emergence of more formation programs outside the religious communities and clerical formation programs has led to the development of formation programs within regulated contexts such as academic theological institutions and universities (Bentley & Buchanan, 2013; Smith, 2014). This development has raised concerns within the spiritual direction community about the professionalization of what has been seen in the past to be an exclusive vocation within the Church (Lescher, 1997). The place of spiritual direction formation within academic frameworks has led to a suggestion that the traditional adult learning approaches and curriculum structures of academia are antithetical to the principles of spiritual direction formation (Leech, 1994).

In contrast to these perspectives, it has been argued that the benefits of academia to those participating in spiritual direction formation include gaining a qualification that is recognized beyond the spiritual direction community in which formation is provided (Smith, 2014). Among other benefits of an academic approach, Smith (2014) also lists the provision of assured systems of quality control governing curriculum and approaches to adult learning. He goes on to note that academic institutions provide opportunities for research, dialogue with other related fields and the option to develop courses that contribute to extending the understanding and application of spiritual direction (Smith, 2014).

The diversity of perspectives on the formation of spiritual directors has been based on formators' or educators' personal reflections on their experience of being formed and forming others in the practice of spiritual direction. There is limited published research in the area of spiritual direction formation particularly from the participants' perspective (Truscott, 2007). This study addresses this gap in research and draws on the insights of participants in a spiritual direction formation program to inform an understanding of what constitutes effective

spiritual direction formation. In the next section, a background of the research project is outlined to provide a context for the study in relation to the researcher and the participants generating the data.

1.1.3 The background of this research project.

This section outlines the key factors that form the background of this research project. An outline of the researcher's involvement in the program that is the subject of this research and the history of the program provide a context for the establishing the relationships that pre-exist the project.

1.1.3.1 The researcher's background

The researcher has been involved in this particular spiritual direction formation program initially as a student in 1995-1996, then as the Director of the Centre which provides the spiritual direction program under investigation. He stood down as Centre Director prior to embarking on this research project but continued as the coordinator of the Spiritual Direction Formation Program. As the current coordinator of the Formation Program, the researcher was required to clearly state to all participants and current students the process and intention of the research and outline how confidentiality and role relationships would be managed in the approach to research. To ensure the research remained ethical, the researcher committed to follow the protocols and guidelines for ethical research as proposed by the Australian Catholic University.

The researcher is a qualified tertiary educator and has completed a Master of Arts specialising in spiritual direction. He was one of the first graduates from this particular program after it was first established in the mid 1990's under a previous Centre Director. After five years of practice in the field, he became a member of the spiritual direction formation team at the Centre and taught and supervised participants in the program before taking on coordination of the program. Since then the researcher has been appointed to a national coordinating council, the Australian Ecumenical Council for Spiritual Direction (AECSD), which oversees the setting of guidelines for the recognition of spiritual direction formation programs in Australia. He was President of the AECSD and Chair of the Formation Guidelines Committee of the AECSD from 2013 to 2016.

1.1.3.2 The history of the program.

The background of this research project relates to a spiritual direction formation program that has been operating since 1994. The program was designed to provide an integrated approach to the teaching and formation of spiritual directors. Instead of breaking the course up into specific subject units, the program was constructed as a continuous formation process integrating the core elements of prayer, listening, discernment, theology and psychological aspects with practical and experiential group work. The psychological aspects include elements of therapeutic engagement that are shared across many of the helping professions such as counselling, psychology, chaplaincy and pastoral care (Cozolino, 2004). These enable participants to more directly relate the theoretical content to the grounded practice of spiritual direction.

The program was originally built around a two-year cycle where participants met weekly in the first year to engage in group work and teaching and on a monthly basis in the second year. In 1998 the program was accredited as part of a graduate program under the auspice of the Melbourne College of Divinity (later reconstituted as the University of Divinity), in Melbourne, Australia. The course was recognized as a graduate program associated with Graduate Diploma and Master of Arts degrees. This required the course to be restructured to conform to the academic standards of the university with which it was accredited and involved bringing the timing, standards and assessment of the course in line with the academic guidelines (UD, 2015).

As spiritual direction formation programs were growing across Australia, the Australian Ecumenical Council for Spiritual Direction (AECSD) was formed in 2006 to regulate standards of formation (AECSD, 2015) and develop an ethical code for the field of spiritual direction. This national body was established from a coalition of spiritual direction formation programs across a range of Christian traditions. Those involved in the implementation of formation programs were asked to submit an outline of curriculum and methodologies relating to their formation training program to the AECSD to be assessed for recognition as a spiritual direction formation program.

The spiritual direction formation program associated with this study was recognized in 2006 through the newly formed AECSD. Since this time the program has continued to run as a formation program based primarily on the same content and methodology initiated at its commencement except for some minor changes to sequencing and time frames.

In 2009, the timeframe of the program was modified to run over three years on a monthly format of practical engagement, teaching and supervision. The formal group sessions were moved from midweek to weekend sessions. This was to accommodate the growing number of people who had work commitments during the week and wanted to participate in the program. This format continued for three years. In 2012 a further change to timing formats was made to help relieve pressure on the formation team members by reducing the number of weekends the team were required to be available. This meant that the formation sessions were modified to a bimonthly format with small group work interspersed between two day intensive sessions. The content and methodologies have remained substantially the same.

To ensure the program remains up to date there is a need to review and reassess the effectiveness and relevance of the formation program. This review is necessary in view of the ongoing changes within spiritual direction formation programs and the wider spiritual direction community. This study contributes to the identification of key theoretical principles and practical implications relating to the learning processes associated with a curriculum program for the formation of spiritual directors that has the potential to benefit the wider spiritual direction formation community.

1.1.4 Previous research in the area.

In spite of the rapid growth of interest in spiritual direction, there has been little research carried out specifically related to the learning processes and training methods applied within spiritual direction formation programs. Some research was carried out comparing the developmental needs of beginner and advanced spiritual directors (Truscott, 2007). However, the study avoided focusing on the processes of spiritual direction formation in relation to methods or approaches to adult learning. Another study examined the impact of spiritual direction formation programs on graduates, particularly investigating their involvement in spiritual direction practice after graduation (Loretta, 2003). There have been two unpublished works on related areas of research in education focusing on specific aspects of spiritual direction programs (Berger, 1990; Galindo, 1987).

1.1.5 Justification for research.

There is a gap in the literature relating to research into the impact of a curriculum program on the learning processes related to the formation of spiritual directors. In spite of the long history of spiritual direction practice, the examination of the basic tenets of spiritual

direction formation principles appear to be absent from recent systematic research, particularly from the participants' perspective. This has resulted in a lack of tested theoretical frameworks against which the curriculum and design of formation programs can be compared, measured and developed.

The rapid, unregulated growth of spiritual direction formation programs around the world suggests the need for research on factors relating to learning approaches involved in forming spiritual directors. There is a range of philosophical, theological and spiritual contexts in which many of spiritual direction programs are set, particularly as they relate to modern and post-modern debates (Ruffing, 2012). This research contributes to the emergence of theoretical and practical frameworks that assist program development in designing effective approaches to learning within a formation context. Implications of these theoretical and practical frameworks are also proposed for improvement in the quality and standard of learning processes associated with the formation of spiritual directors.

Many of the newly established formation programs have been developed by practitioners relying on past experiences of particular approaches to learning and methodological principles. This highlights the need for a systematic review of these approaches so that theoretical and practical guidelines can be identified that assist in the design of programs suited to the formation of spiritual directors in the future. This study addresses two main gaps in the existing body of research: theoretical and practical gaps.

1.1.5.1 Theoretical gaps.

Several theoretical models have been formulated to describe approaches to education and learning that apply experiential and reflective practices. Some of these are related to relational aspects of learning (Edwards 2005; Gunnlaugson, 2009; Wilber 2000) and several describe experiential learning approaches (Eriksen, 2012; Hall, 1988; Kolb, 1984; Mezirow, 1991; Scharmer 2009). An investigation of the literature has resulted in no direct linking of these approaches to their application within programs for the formation of spiritual directors. However, these approaches have provided principles relevant to some aspects of the formation program.

The contemplative processes of learning which are particularly relevant to spiritual direction formation require further investigation in line with the growing body of literature emerging in this area (Archibald & Hall, 2008; Gunnlaugson, 2009; Hart, 2004; Roth, 2006;

Sanders, 2013; Zajonc, 2013). This study addresses the need for contemplative approaches that can be applied in guiding formation teams in their analysis and development of spiritual direction formation curriculum programs.

1.1.5.2 Practical gaps.

Many articles have been written on a wide range of topics related to aspects of spiritual direction programs in journals such as *Presence: An International Journal of Spiritual Direction*. The majority of these articles or books are not research publications and only partially examine spiritual direction formation programs (Birmingham & Connolly, 1994; Buckley, 2005). They have tended to concentrate on certain aspects of programs with limited reference to how these aspects relate to a program as a whole.

This study explores experiential aspects of a particular spiritual direction course to identify core elements of that program that relate to the role of formators and peers in the learning process. Relational issues are also explored with a view to understanding how the interactions between participants in the course impact the learning process. The Australian Ecumenical Council for Spiritual Direction (AECSD) formation guidelines that govern the design of spiritual direction formation programs in Australia require contemplative processes of learning and practice (AECSD, 2015). There is a growing body of literature and research related to the practices and disciplines associated with contemplative approaches to learning (Gunnlaugson, 2011; Huston, 2010; Repetti, 2010; Hart, 2004). The practical application of contemplative approaches in a spiritual direction course requires investigation to identify their role in promoting learning among and within participants.

The theoretical and practical gaps briefly outlined here highlight the need to identify a focus for this study. The next section outlines the intended focus of the study and provides a list of questions to guide the research.

1.1.6 Focus of this thesis.

This study explores a particular spiritual direction formation program from the participants' perspective with a view to identifying theoretical principles that can inform the understanding of learning in formation programs. The study also aims at ascertaining the implications of these theoretical principles on the future development of spiritual direction formation programs. To achieve these outcomes, aspects of learning within the program are explored to investigate what approaches to formation most effectively shape participants as

spiritual directors. The overarching questions that guide this research relate to what constitutes spiritual direction formation and how it can be effectively applied within a curriculum program to enhance learning.

As stated earlier, there has been little published research relating specifically to the learning approaches associated with spiritual direction formation. With the rapid expansion of spiritual direction formation programs, there remains a need to clearly enunciate the factors that contribute to effective formation of spiritual directors. “Effective” relates to extending the learning processes beyond the exchange of knowledge to engage participants in the practices that result in the desired outcomes relevant to spiritual direction. The research project explores the following questions.

- What factors contribute to the enhancement of participants’ learning in a spiritual direction formation program?
- What effect do these factors have on the processes of learning within the formation program?
- How does the formators’ role in the formation process contribute to the promotion of these factors?
- What influence does the whole learning community have on creating a context in which these factors are relevant to a diverse range of participants in formal and informal contexts?

These questions are explored subject to certain limitations and delimiting factors which are outlined in the following section.

1.1.7 Research limitations.

The scope of this study is based on a spiritual direction formation program which was designed as an ecumenical program open to religious practitioners and lay members of faith communities. Other spiritual direction programs are not included in the collection of data as the study is not designed to be comparative. The research identifies core learning principles and approaches that are relevant to the particular formation program that is the focus of this study.

One of the delimiting factors that defines the scope of this study relates to the exclusion of details of the curriculum content of the program and the traditions from which the

practices are sourced. The details of the curriculum program are not examined because the focus of the study is on the participants' learning.

Selection of participants for the study has also been restricted to final year participants and graduates from the previous six years of the spiritual direction formation program. This resulted in twenty one participants being interviewed from a possible field of thirty candidates. By limiting the participation to recent graduates and current students, emphasis is given to the factors that guide the implementation of the formation program in its most recent formats. With these limits in mind, the study adopted a research design that provided a systematic approach to gathering and processing data as outlined in the following section.

1.2 Research Design

The study draws on the first hand experiences of participants in a formation program to provide data that is analyzed to identify key factors pertaining to the approaches, processes, and contextual factors that enhanced the participants' learning as spiritual directors. The research design for this study has been developed around a set of theoretical frameworks and a methodology that is briefly outlined in the following sections and will be discussed in depth in the research design chapter.

1.2.1 Theoretical framework.

This research project applied several epistemological frameworks that describe the approach taken to process the data from participants and to define the researcher's role in interpreting the data. A constructivist approach informed the understanding of participants' contribution to the generation of meaning in relation to their experience of the formation program. The researcher's involvement in making sense of the data, provided by participants, was seen through the constructivist lens to understand what the participants were saying in relation to the subject of the study. The next phase of the investigative process involved a constructionist approach in which the researcher and participants identified shared meaning in relation to the data emerging from the interviews. Having completed the interviews, the researcher categorized the data before reviewing literature relating to the themes that emerged from the data. Informed by the literature review and broader societal, religious and cultural frameworks, the researcher examined the data and findings through a social constructionist framework. This provided a lens through which to view how broader social

factors and previous research informed the interpretation of the data relevant to what has been generated within related fields of research and enquiry.

The input from various participants provided data that do not necessarily come from commonly agreed presuppositions. As a result, data needed to be interpreted through a process that consistently weighed the significance of various elements being considered. Interpretivism provided a theoretical perspective through which the researcher could view the data and construct meaning that was relevant to the focus of the research questions. In conjunction with the interpretivist perspective, the researcher applied a symbolic interactionist perspective that suggested that all interactions were built on an agreed set of symbols whether in language, roles or images (Aldiabat and Navenec, 2011). By drawing of commonly understood concepts and terminology, the researcher in dialogue with the participants was able to identify shared meaning constructs that informed the data emerging from the interviews.

Using these theoretical frameworks, the researcher adopted a methodology that matched the research intent and context. This methodology is briefly outlined here and will be discussed in depth in the research design chapter.

1.2.2 Methodology.

The research for this project was developed around the principles of grounded theory as originally developed by Glaser and Strauss (1967) and is sometimes referred to as the classic grounded theory approach (Glaser, 2012; Aldiabat & Navenec, 2011; Roderick, 2009). Building on the foundations of symbolic interactionism, grounded theory draws on symbolic concepts familiar to both participant and researcher. Through interactions between the researcher and participants, data are gathered to be analysed and processed to formulate recommendations and theoretical frameworks.

1.2.2.1 Grounded theory.

According to the principles of classic grounded theory, data are collected and analysed in a continuous process with a view to identifying categories. The categories were then coded to enable their classification into related sub categories (Glaser, 1998). This is distinct from alternative approaches put forward by Strauss and Corbin (1998) and Charmaz (2004). In seeking to streamline the analytical process, Strauss and Corbin (1998) proposed that a coding system be generally predetermined to expedite the process of establishing categories

during data collection. This approach tends to “force” the data instead of allowing the categories to emerge through the regular reviewing of the data (Glaser, 2008). Emphasizing the participant’s central role in the data collection, Charmaz (2004) argued for a purely constructivist approach to analysing the data. However this approach is limited to one epistemological perspective which could exclude insights provided by other perspectives (Glaser, 2012).

The range of epistemological and theoretical assumptions, as outlined above, provided a context for understanding the data collected. Any one epistemological perspective did not govern the process of analysing and codifying the material. This was to avoid compromising the process by weighting one epistemological perspective over another and thus distorting the analytical process (Glaser, 2012). Constant comparison of data gathered and processed through a range of perspectives provided the means to reshape previously held views and develop the emerging concepts and theories (2012).

One of the key tenets of classic grounded theory is that it is a generalized approach to theory development (Glaser 2012). This means the research process is designed to avoid fragmenting research samples into sub populations, places or events. The focus of grounded theory is to identify consistencies and shared patterns across a variety of participants and events to construct concepts and theories that are less bound by specific circumstances (O’Reilly, Paper, & Marx, 2012). This dictated that the participants in the research project were not selected for particular traits or associations apart from their active involvement in the formation program whether currently or previously.

1.2.2.2 Method.

To enable the development of a theory from the ground up, grounded theory approaches (Glaser & Strauss, 1967) rely on the collection of data from participants directly associated with a project. The unstructured interview is a method applied in grounded theory to gather the primary data from which categories can be established and theories constructed (Minichiello, Aroni & Hays, 2008).

Unstructured in-depth interviews. The researcher used unstructured in-depth interviews with recent graduates and current participants in the formation program. Unstructured interviews enabled the interviewees to respond to the focus of the research in a way that minimized the influence of the researcher to shape the data in line with the researcher’s

desired agenda (Glaser, 2012; Mikecz, 2012; Simmons, 2010). This approach enabled participants to express their observations freely as they related to the specific aspects of the study and research variables. The researcher guided the process to ensure the interview contributed to the intent of the study to provide focused, reliable and unbiased data from which to identify categories and a theory relevant to the research focus.

An interview protocol was used by the researcher to ensure the effective application of the interview for data collection (Cresswell, 2009). The protocol also assisted in standardising the approach and referencing across all interviews (See Appendix D). An initial statement about the process and intent of the interview was prepared to ensure the same information was conveyed to each interviewee. A list of open-ended questions was formulated for the sole purpose of providing the researcher with prompts for participants if the interview was moving away from the core focus of the interview (Glaser & Strauss, 1967). A final statement of appreciation was designed to thank the interviewees for their time and contributions to the research project. The protocol (see Appendix D) was intended to provide the researcher with a consistent approach to interviewing and as a framework for developing clear and congruent field notes (Cresswell, 2009).

1.2.2.3 Processing the data.

The collected data were categorized applying classic grounded theory principles (Glaser & Strauss, 1967). Categories were examined to ascertain how the approaches and contextual elements impacted on participants in the program. The categories provided the framework of findings which were evaluated to isolate those elements deemed to be most influential in contributing to a theory relating to the formation of spiritual directors.

Consistent with classic grounded theory principles (Glaser & Strauss, 1967), the intention of the researcher was to embark on investigating the project with no preconceived hypotheses or categories to guide the gathering of data. This approach was taken to provide maximum opportunity for participants to identify the issues and aspects of the formation program that they deemed were most significant to their formation. Subsequently their insights could form the basis for program design pertaining to spiritual direction programs.

When processing the data, the researcher's focus was on elements of the program that the participants isolated as most influential to their formation as spiritual directors. The issues and propositions that arose relate to intra-, inter- and trans-personal elements of the learning

process that participants perceived to have the greatest impact on their learning (Gunnlaugson, 2011). The researcher's purpose was to become aware of factors that influenced participants' processes of reflection and meaning making, their interactions with others and how the learning community influenced their learning and formation as spiritual directors. The distinction between spiritual direction formation and other forms of education and learning guided the analysis of the data related to the research subject.

After data collection and categorization, the existing body of literature was drawn upon to analyse and articulate the findings arising from this research. In the final writing up phase of the research, the literature was also drawn upon to place the emerging categories in the broader context of previous studies and research (Glaser, 1998).

The study offered theoretical principles and their implications for the development of learning processes that enhance the formation of participants as spiritual directors. The intention was to identify the basis for a theory that described the principal aspects of a contemplative process of learning that was relevant to spiritual direction formation programs. To enable the accurate expression of the data, some definitions and assumptions are clarified in the following section.

1.3 Definitions and Assumptions

As well as identifying key definitions, the following section describes how pivotal terms are applied within the script of the study.

1.3.1 Descriptive terms applied within the research project.

Several terms are used in this study to distinguish key subjects and roles within the research project. There are a range of terms that relate to the specific roles that are part of the spiritual direction vocational vocabulary. These terms include *spiritual direction*, *spiritual director*, *directee*, *spiritual direction formation and traditions*.

In this study, *spiritual direction* describes the vocational tradition in which practitioners accompany people who desire to make sense of spiritual aspects of their lived experience (Ault, 2013).

Spiritual director is the term used as the vocational descriptor for those practitioners engaged in offering spiritual direction. Their role is to attend to their own spiritual life

experience as well as listening to and guiding those that come to them for spiritual direction (Lunn, 2009).

The term *directee* describes a person who comes to a spiritual director for spiritual direction.

Spiritual direction formation refers to the process of training spiritual directors. This can take the form of formal academic curriculum based training programs (Smith, 2014) or informal and unstructured mentoring or apprentice type programs (Nicholson, 2014).

Spiritual direction traditions describe distinctive historical, cultural and religious contexts in which this vocation has been applied and the associated philosophies of spiritual direction which developed from these traditions and subsequently contributed to their identity (Vest, 2003).

Formator is a term traditionally applied to someone who guides the process of learning within spiritual direction formation programs. They are referred to as *formators* based on the Latin term *formator* which means “a former, fashioner, maker” (retrieved on 19 January 2016, from University of Notre Dame Archives. <http://archives.nd.edu/fff.htm>). This term is used throughout the thesis to denote the guiding role of teaching staff identified within spiritual direction formation programs. When reference is made to *teachers* in general, the term *teacher or educator* is applied, particularly in the literature review, to distinguish other teaching roles from those adopted in spiritual direction formation. In some cases, participants in the research interviews refer to the *formators* in the spiritual direction formation program as *teachers*. The terms *formator* and *teacher* are used interchangeably in this thesis.

Student and participant. People undertaking studies in the spiritual direction formation program are predominantly referred to as participants although references in literature may also use the term *student* interchangeably with *participant*. The researcher chose to differentiate between *student* and *participant*. The term *participant* is used to emphasize the active and interactive nature of the spiritual direction formation program that requires those involved to actively participate in a breadth of elements within the course.

1.3.2 Other terms used within the thesis specific to this research field.

There are several terms used in the study that related to aspects of spiritual direction that are particular to this field of enquiry. They include the terms *peer supervision groups*, and *verbatim reports*.

Peer supervision groups describes groups of participants who meet together under the supervision of a formator to engage in dialogue relevant to particular assigned activities. In these sessions, participants are guided in contributing to the supervision of each other based on written accounts of spiritual direction encounters they have engaged in outside the curriculum program.

Verbatim reports in this study refers to written accounts that record a short segment of a longer spiritual direction encounter. As well as a word for word account of a section of a spiritual direction conversation, the directors in formation record reflections on what they noticed in the encounter. These reflections include what directors noticed within themselves and the directee as well as the practical elements of the encounter. These reflections provide the basis for supervision within the *peer supervision group* discussion.

Having defined key terms, the overall structure of the study is outlined in the next section of this chapter.

1.4 Structure of Thesis

The thesis consists of six chapters which progressively outline the background, related literature, research design, findings and discussion of data and the theory and implications for future design of programs.

Chapter one describes the historical background and context of thesis. It systematically develops a rationale for the study highlighting gaps in research relating to curriculum and adult learning processes in formation programs. The chapter also identifies what limits governed the scope of the study and how the researcher also delimits the study to focus on those aspects relevant to the research problem. An overview of the approach taken to address the research problem is provided to explain the strategy applied within this study. Key terms are defined and core concepts explained.

Chapter two reviews the literature associated with the issues that emerge within the findings. This provides a context in which the findings emerging from the data are examined. A review of the existing body of literature is outlined in relation to the categories identified within the research findings. The literature review includes the various approaches to learning, contemplative aspects of learning, and the impact of various contextual issues. Several theoretical models that describe experiential and contemplative processes of learning

are examined. Literature relating to contextual issues focuses on what is being said about the role of teachers and the community of peers in the learning process.

The *third chapter* presents an outline of the research design applied within this study. The frameworks and procedures are outlined as applied to the empirical research component. Various aspects of the research design are described in an overview of the epistemological foundations, theoretical perspectives, methodology and techniques used to collect data. The trustworthiness of the approach to this research is also discussed. The chapter explains how the research was carried out and the reasons behind this approach. Strategies for the collection and analysis of the data are also discussed.

The *fourth and fifth chapters* present the findings that emerged from the data generated by participants in the spiritual direction course. The themes, identified within the findings, are discussed under four categories and their related sub-categories. The four categories explored in these chapters are: the formational approaches to learning; contemplative processes of learning; the role of formators in learning; and the learning community as teaching context. Direct references to interview transcripts support the categories being presented in relation to the data gathered. Quotations from the interview transcripts enable the views and insights of participants to be presented to support the findings. The findings are discussed in relation to the impact of the various approaches on learning and the contextual issues related to participant's formation as spiritual directors. The discussion of the findings is related to literature relevant to the themes emerging from the data and the researcher's experience in the field.

The *sixth chapter* provides an overview of the study. It also proposes the theoretical principles that have emerged from the findings and their implications for further development of spiritual direction formation programs. The themes that have emerged in the study are also presented as possible areas for further research.

1.5 Conclusion

This chapter has outlined the background and foundations for this study. The study is justified on the basis of the lack of published research relating to learning processes and contexts that influence participants' formation as spiritual directors. An outline of the research design has been introduced and justified on the basis of its relevance to the study being undertaken. The limits of the research have been briefly presented including the

delimitations imposed by the researcher. Key terms used within the study have been defined and their application within the study delineated in relation to associated terms. The overall structure of the thesis provides an overview of the research project. Based on the foundations outlined in this chapter, the details of the research components are presented in detail in the subsequent chapters commencing with a review of the existing body of literature.

Chapter 2 Review of Literature

This chapter outlines the literature that was reviewed as part of the response to the categories that emerged from the data. The staging of a substantial review of literature after the identification of categories is in line with the principles of classic grounded theory (Glaser, 2012; Aldiabat & Navenec, 2011; Roderick, 2009). Glaser (2009) advocates researchers avoid reading literature relevant to the emerging categories and theory until the categories have been established. Only then does he propose that the researcher draw on the literature as part of the social constructionist phase of seeing how the categories and theories relate to other studies and research. In view of this approach, the literature reviewed in this chapter relates to the categories that emerged in the findings. The themes that are explored as part of this review include: approaches to learning; contemplative processes of learning; the role of formators in the learning process; and the role of community in learning. Figure 2.1 presents a conceptual overview of the literature review.



Figure 2.1. Overview of literature review – a conceptual diagram.

The insights drawn from the literature situate the categories emerging from this study in the broader context of previous research. This assists in identifying how the literature provides a resonant and contrasting perspective to the theory evolving from the data.

2.1 Approaches to Learning

In literature, various approaches to how learning occurs have been developed to provide an overview of the interrelationship that exists between them. As a vocational discipline, spiritual direction is primarily learnt through relationally-based contemplative approaches to processing shared experience (AECSD, 2015). More than seventy years ago Dewey (1938) asserted, in a more general educational context, that experience is critical to the learning process for the development of relevant and practical engagement with curriculum content. As Dewey (1938) stated:

I have taken for granted the soundness of the principle that education in order to accomplish its ends must be based upon experience— which is always the actual life-experience of some individual. There is no discipline in the world so severe as the discipline of experience subjected to the tests of intelligent development and direction. (1938, pp. 89-90)

A spiritual direction formation program consists of multi-disciplinary and multi-dimensional elements that contribute to preparing spiritual directors to respond and relate to a wide variety of experiences that directees may bring to spiritual direction sessions (Barry & Connelly, 2009). Spiritual directors are required to engage with and respond to personal encounters that are complex, unpredictable and in most cases spontaneous (Pickering, 2008). This requires an ability to process experiences and respond as they are presented. This ability cannot solely be taught didactically. The core attributes of a spiritual director need to be developed, or in spiritual direction terminology *formed*, within a spiritual director over time. The process of forming occurs through learning to engage with and reflect on a wide range of experiences over an extended period of time (McCall, 2010). The process requires participants to acquire objective information as well as engage with subjective reflection on affective, sensate and intuitive aspects of their personal life experience (Cozolino, 2004; Pickering, 2008).

The influence of various formative and relational approaches has been identified as emerging themes in the literature (Buber, 2002; Holgate, 2014; Marsh, 2014; Muto, 2011; Nicholson, 2014; Smith, 2014; van Kaam, 2007). These relate to approaches to learning that participants engage in to assist them in making sense of their lived experiences. The impact of different approaches on shared learning indicates the need to examine the relationship

between various approaches to establish how they intersect to contribute to the overall learning process. The insights that flow from examining the intersection of these approaches inform the overall design of the learning process in spiritual direction courses. Two main approaches to learning within the spiritual direction course under investigation were identified: formational; and relational approaches. These approaches are addressed in the following sections to outline what previous literature and research has noted about them.

2.1.1 Formational approaches to learning.

This section reflects on literature related to the concept of formation and its relationship to learning particularly as it relates to spiritual direction formation. The understanding of the concept of formation is discussed in association with the learning processes in spiritual direction courses.

The broader concept of formation was explored and written extensively on by Adrian van Kaam (2007) and his associate Susan Muto (2011). They outline some general principles that identified formational approaches to learning as distinct from the other approaches. In reflecting on self-emergence and formation, van Kaam (2007) argues that formation is not about imposing learning or practice on others but incorporates an “evocation” (2007, p. 18) or calling forth of feelings and memories and experiences that inform the process of learning. He relates the process of formation with the emergence of self-awareness which results in personal growth and the formation of self-identity. Spiritual formation relates to the developing openness to awareness of that which is “the mystery of the “more-than”” (2007, p. 24).

In building on van Kaam’s (2007) work, Muto (2011) notes that formation involves a range of elements that include experiences, observable data and more subjective theoretical accounts. She distinguishes formational approaches to informational oriented approaches by noting that the former are more focused on “giving proximate personal form to this essence in one’s everyday existence” (2011, p. 95). The formation, Muto (2011) proposes, is not just about a person’s interior existence but also the relationships that impact and affect them. As such it is seen to impact the full range of a person’s lived experience including their intra-, inter- and transpersonal interactions (Gunnlaugson, 2011).

Formational models of learning associated with spiritual direction training have been discussed in relation to a broad range of programs that have operated in various traditions and contexts (Marsh, 2014; Nicholson, 2014; Ruffing, 2014; Smith, 2014). Generally, the

accounts of these models have been presented by formators in the field who have sought to advocate for particular approaches to formation in a growing field of spiritual direction formation programs.

In seeking to make sense of his own formation as a spiritual director, Nicholson (2014) describes his formation as like an apprenticeship. In describing the learning process this way, he is attempting to convey the essential aspects of the process that he found most beneficial. They include the mutual relationship he had with his mentor and supervisor in his formation in spiritual direction. He also notes that spiritual direction involves practical elements and skills that need to be honed, and the apprenticeship model reflects that in its approach. The other aspect of the apprenticeship model that resonates with Nicholson (2014) is the fact that the formation or learning occurs over a few years. He contrasts this model with didactic models of information acquisition and theoretical engagement that are more time driven.

Another understanding of the spiritual direction formation process is proposed by Marsh (2014) who focuses on the need to develop an awareness of God or the transcendent as the core aspect of formation. He contends that the skills and practices related to spiritual direction need to be seen through the lens of a person's belief in the Divine influence in their lives in the process of formation.

Taking a more pragmatic approach to formation, Holgate (2014) offers some practical resources that are based on observable outcomes within a formation program. This is in the form of an observation sheet that invites participants to go through a checklist that relates to a range of aspects of a learning experience in a spiritual direction practical session. She emphasizes some of the more objective aspects of formation that relate to the development of awareness and skills associated with spiritual direction practice.

Academic accreditation of the spiritual direction course within the Melbourne College of Divinity in 1998 resulted in more rigorous academic standards. Smith (2014) acknowledges that academic recognition means that participants' qualifications will be more widely recognized. However, he goes on to emphasize that the formation of participants spiritually, the development of their skills and abilities, and their knowledge of the spiritual direction traditions and related beliefs remain the essential elements of the formational learning process. Smith also notes that the association with an academic institution also has associated benefits of financial support, academic standards, and opportunities for research and administrative support that enabled programs to be maintained.

The question that the partnership between formation and academic programs raises is whether the latter limits the agenda of the formation programs. In response to this question, Bentley and Buchanan (2013) propose that courses such as a spiritual direction formation program can operate within both academic and vocational contexts. This occurs when complimentary approaches to self-awareness and skill development are applied in conjunction with the assessment mechanisms that challenge participants to maintain their academic rigor.

The formation program which is the basis of this study operates in an academic context yet employs formational approaches to learning. Responses from the participants as to which elements they regard as core to their learning led to the need to review the literature about the relational approaches and the learning space.

2.1.2 Relational approaches and the concept of the learning space.

According to some scholars, too much emphasis has been placed on third person objective approaches to learning in academic higher education contexts (Archibald & Hall, 2009; Sarath, 2006). However there has also been a focus on engaging the first person subjective and third person objective approaches in partnership to promote a more holistic approach to learning (Roth, 2006). In addition, the role of second person intersubjective approaches to learning has been raised as a new frontier in the development of approaches to learning (De Quincey, 2000; Edwards, 2005).

The role of second person intersubjective approaches has been particularly associated with contemplative processes of learning which relates to the approach recommended for spiritual direction courses in Australia (AECSD, 2015). A focus on the second person intersubjective approaches (Gunnlaugson, 2009) within broader learning contexts is intended to assist in contributing to awareness of the qualities, meaning and significance of second person inter-subjectivity in the contemplative approaches adopted in courses such as spiritual direction courses.

Third person objective perspectives referred to the observation of experiences with a view to analysing and conceptualizing understanding that which is external to the observer to assist in defining key elements of the experience (Wilber, 2006). First person subjective perspectives relate to participants' noticing interior aspects of their personal responses and reactions to experiences processed by self-reflexive engagement with the experience (Cunliffe, 2004). The third person inter-objective perspective referred to group exchanges

that analysed and conceptualized the facts in an objective dialogue. Second person intersubjective approaches focus on participants' shared experiences processed through group interactions whether one on one or in group situations (Gunlaugson, 2009).

In surveying the work of C.S. Lewis (1980) in relation to objectivism and subjectivism in learning, McKinney (2014) noted that Lewis argued against the use of subjective approaches to learning as a damaging influence in knowledge generation. Lewis saw it as a challenge to objectivism and objective perceptions of truth. However, McKinney (2014) concludes that such comparisons imply an overly fixed view of the two perspectives and does not allow for the relationships that shape our interactions and learning.

Another approach to understanding the relational dimension of interactions is proposed by Buber (2002) who focuses on what occurs between participants. Nominating this concept as the "sphere of "between"" (2002, p. 241) or the "realm of "between"" (2002, p. 243), Buber describes the space that evolves out of exchanges between participants as separate from them and distinct from the social or world environment. He notes that it is a temporal space that is created between participants in situations where they engage verbally or non-verbally in interactions around shared experiences or encounters. This space exists counter to the realm of the individual which constitutes the basis for individualism. It is also distinguished from the social setting of the group which is identified with collectivism.

The "between" that Buber is referring to relates to the place of exchange that exists beyond the individual and the collective and defines the interaction as neither subjective nor objective between these two perspectives. As Buber (2002) states "'Between' is not an auxiliary construction, but the real place and bearer of what happens between men (sic)" (2002, p. 241). Buber's (2002) concept of learning involves the need for empathy in the participants to enable them to engage fully with each other in the process of dialogue and debate (Stern, 2013a).

The association of surprise with the outcomes of learning is another aspect of the learning process that Buber (2002) sees as a distinctive element in a "real lesson" (2002, p. 241). The surprise element suggests a level of unpredictability in terms of the teachers' approach to engaging students in learning that promotes creativity in students' interactions (Stern, 2013b).

In the learning context of the spiritual direction course, the "between" is identified as the space created when participants engage with each other in group or one-on-one

exchanges. In this study, the *sphere of between* (Buber, 2002) is referred to as the *learning space* and is explored to determine its influence on the way participants engage with each other in the process of learning.

The concept of the “between” relates closely to the understanding of the second person intersubjective approach to learning where the focus is on the interactions between two or more parties (Gunnlaugson, 2009). The subject and content of the exchange do not necessarily govern the definition of the space but the encounter itself distinguishes its existence as a real space (Buber, 2002). This understanding of the shared space created by interactions between participants has some similarity in focus to aspects of Palmer’s (2007) understanding of the “subject-centered” (2007, p. 119) approach to learning.

Palmer (2007) identifies the between space with his *subject-centred* approach to learning and defines it by distinguishing it from the “teacher-centered” and “student-centered” (2007, p. 119) approaches to learning. In drawing the distinctions between these more readily identified approaches to learning in traditional education settings, Palmer (2007) seeks to highlight that there is an alternative to focusing on the individual parties involved in the learning process. His intention is similar to Buber’s (2002) approach in seeking to focus on what is occurring between participants rather than on the individual parties involved.

In giving attention to the subject of the desired learning, Palmer (2007) understands *subject* to be more than just the curriculum content. His concept of *subject* embraces a wider understanding including the breadth of all that relates to the interconnectedness of our existence and experience. In this sense, Buber’s (2002) “sphere of “between”” (2002, p. 241) and Palmer’s (2007) “subject-centered” learning (2007, p. 119) approximate each other. Both seek to convey the sense that the *learning space* between participants is distinct from the parties that generate the space by their interactions. By understanding the space/approach in these ways, both scholars shift the focus for learning away from the individual or collective and draw attention to what happens between the participants (Buber, 2002). Palmer (2007) focuses on what happens within the space with the focus on the subject, and Buber (2002) on the definition of the space as a phenomenon. Both Palmer (2007) and Buber (2002) support the notion that this opens the way for the breadth of both subjective and objective aspects of learning to be considered alongside each other within the learning space rather than in opposition to each other (Roth, 2006).

These various perspectives indicate the multidimensional lens through which shared and personal experiences relevant to spiritual direction practice and its associated learning processes can be categorized. The relevance of each of these general educational approaches is in their intersection with contemplative processes of learning in the development of spiritual directors. Having focussed on the relational factors relevant to this study, attention now turns to some of the contemplative processes of learning that enable participants to systematically engage with the experiences they encounter in the learning space.

2.2 Contemplative Processes of Learning

In reflecting on learning approaches within curriculum design, this section explores key factors that define and contribute to the design and implementation of contemplative processes of learning.

Relevant literature explores contemplative approaches in relation to models and methods of reflection that are associated with contemplative practices and experiential processes. The term “contemplation” originates from the Latin term *contemplari* and the Greek term *contemplatio* (Hall, 1988). The first part of the terms *con* means *with* and the second element in these terms *templatio* refers to measured out places which came to be associated with places of worship or divine access such as temples. Together the original terms referred to being in places marked out for access to the divine realm or the realm beyond the immediate known world. As such, contemplation came to be understood particularly in the Christian tradition as a stance of being open to that which is beyond our human capacity to know or comprehend (Binz, 2008).

Contemplative processes of learning include processes such as meditation, contemplation, journaling, experiential engagement and the development of reflective and reflexive awareness of lived experiences (Cunliffe, 2004; Eriksen, 2012; Gunnlaugson, 2009; Hart, 2009; Kolb, 1984; Zajonc, 2013).

The shaping of the curriculum in courses based in the contemplative and reflective approaches to learning has required a practical, experientially-oriented design focus (Dencev & Collister, 2010). The application of practical learning methodologies such as contemplative disciplines, reflective processing, and collaborative interactions are oriented towards addressing a wide spectrum of participants’ learning requirements within an adult context (Dencev & Collister, 2010; Seidel, 2006). These include the engagement with self-reflexive

processing, the exploration of intuitive insights, the contextualization of learning within historical frameworks, and the accounting for situational variables (Seidel, 2006).

Contemplative design elements in spiritual formation curricula are intended to address developmental needs within participants in line with learning outcomes (Hart, 2004). They also promote effective traits which assist the process of learning including improved concentration, heightened empathy with other participants in learning, reduced anxiety and improved performance overall (Hart 2004). This has been attributed to a process-focused approach to curriculum design which is built on an understanding of course content that allows room for a considerable amount of inner work by participants and pays attention to relationships within the learning environment (Gunnlaugson, 2009; O'Hara, 2006). Learning focused on process engages participants in gathering and deciphering information using the abilities and perceptions applicable for discerning its importance when critically appraising knowledge (O'Hara, 2006). This approach to learning is intended to assist participants in becoming aware of the broader aspects of learning relevant to the universal nature of lived experience, including how people relate to the natural world and self-awareness (Tisdell, 2008). Experientially focused contemplative curriculum models promote engagement with affective, sensate, intuitive and spiritual aspects of experience as well as cognitive elements (Cranton, 2006; de Souza, 2010; Dirkx, 2012; Hart, 2004)). They contribute to the identification of obscure features of the subconscious to provide an enhanced comprehension of the themes arising within academic courses (Gunnlaugson, 2011).

While these approaches to adult learning show potential, there have been cautious responses to aspects of contemplative processes of learning. For some, these approaches are "too inward, too private and simply a personal journey not connected to others." (Seidel, 2006, p. 1903). However, by taking this position, the inter-subjective or interactive elements of this approach are overlooked where intentional incorporation of group work and conversation are considered part of the learning process (Gunnlaugson, 2009). In this study the group interactive aspects of the contemplative process of learning are explored to establish the basis on which the intersubjective approach works in association with the contemplative approach to enhance the participants' engagement with the course.

Contemplative processes of learning have recently attracted a resurgence of interest in the area of research in higher education contexts (Archibald & Hall, 2008; Sanders, 2013; Seidel, 2006). The origins of contemplative processes of learning have been traced back to

early Greek philosophy where it was associated with developing self-awareness or knowledge through reflection based on the interchange between students and a master or teacher (Stock, 2006).

Contemplative processes of learning continued to play a central role in education up until the 12th and 13th centuries. In this period, Stock (2006) contends, university education moved away from the monasteries and church schools to embrace the natural sciences and theologies based on Aristotelian logic and approaches to learning. The emergence of books in printed form shifted the focus of study from the traditions of communally meditating and reflecting corporately on read texts as practiced in *Lectio Divina* (Badley & Badley, 2011; Binz, 2008; Hall, 1988) to individual approaches concerned with personal reading and study more prominent in higher education in recent centuries (Stock, 2006).

Others have given expression to what they understand contemplative processes of learning involved. Zajonc (2013) describes contemplative processes of learning in broad terms when he states, “contemplative pedagogy is one that strives for complete attentiveness; it seeks to achieve penetrative insight and the full comprehension that dispels ignorance” (2013, p. 91). The Naropa University, in Boulder, Colorado, has been at the forefront of exploring contemplative approaches to education. On its website, contemplative processes of learning are expressed in terms of outcomes as presented in the following description. “Engaging the whole person in the learning journey, contemplative education fuels curiosity, creativity, self-awareness, and critical thinking; unleashes innovation; and fosters a desire to serve” (Naropa, 2015).

The next section explores what has been written about contemplative processes of learning to ascertain their significance to the learning process. The sections focus on three main aspects of contemplative processing of learning: time to reflect (Hart, 2004); the role of experience in learning (Kolb & Kolb, 2009); and critical feedback approaches (Hattie & Timperley, 2007). These aspects of the literature review are illustrated in Figure 2.2.

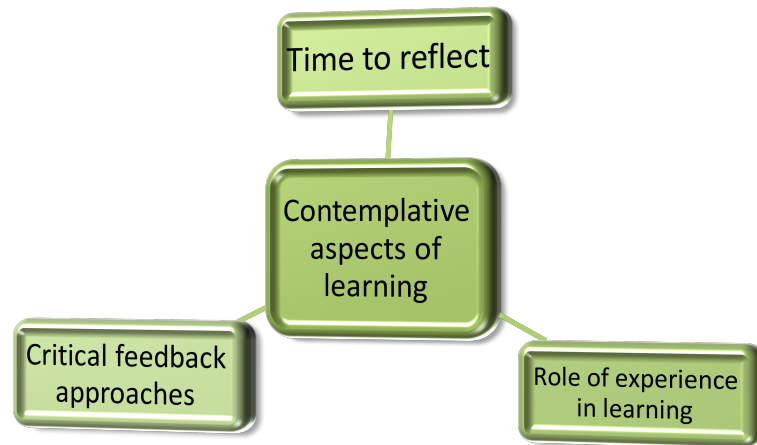


Figure 2.2. The role of experience in the learning process.

2.2.1 Time to reflect.

Two main themes emerge from the literature that relates to the process of reflection in contemplative learning contexts: the timing of educational processes; and the nature of reflective and reflexive responses to what is being taught and experienced. This section discusses literature about the influence of time in relation to both the pacing of the learning process and the distinctive contributions of reflective and reflexive approaches to learning are also investigated in relation to their impact on students' engagement with the curriculum program.

The time factor in the learning process within education has been the subject of much debate in recent times. The call for the provision of time for students to reflect on and engage with the learning processes has been raised in a variety of contexts (Ball, 2012; Barker, 2012; Hartman & Darab, 2012; Payne & Wattachow, 2009). Kolb & Kolb (2009) observed "A key to learning success is the establishment of the appropriate time frame expectation for its achievement. The most common time framing error is the expectation of a "quick fix" and instant mastery" (Kolb & Kolb, 2009, p. 314). With a focus on the need to reduce time and increase content within academic contexts, taking time to slow down and reflect appears countercultural to traditional approaches to higher education (Swirski & Simpson, 2012).

The focus on streamlining higher education processes to make them more efficient has contributed to attempts to speed up the learning process (Payne & Wattachow, 2009). Some scholars contend that this has been a result of wider governmental and cultural shifts which

have influenced universities to embrace more expedient approaches to information transfer without accounting for the significance of time to engage with experiences in the learning process (Honoré, 2004, Lynch, 2006). The resultant “speedy pedagogy” (Hartman & Darab, 2012, p. 58) provides students and participants with limited opportunity to reflect on and analyse what is being presented to them in the learning context. However there have been voices within academia that have challenged the culture of efficiency and *speedy pedagogy* that have dominated academia in recent times. One such voice is that of Harvard Dean, Harry Lewis (2004), who wrote a letter to new students titled, “Slow Down”. In the letter he urged students to take their time with their studies in processing the content and engaging with the context both within and beyond the university.

The term “slow pedagogy” (Payne & Wattchow, 2009, p. 30) describes an approach to learning that allows time for students to become aware of a broader range of elements within their educational practice. Payne & Wattchow (2009) suggest that it “encourages meaning-makers to experientially and reflectively access and address their corporeality, inter-corporeality, sensations, and perceptions of time, space, and place” (Payne & Wattchow, 2009, p. 30). As well as accessing these experiential and reflective elements of the learning experience, the provision of time has come to be seen as a key factor in engaging deep cognitive aspects of learning related to creativity and innovation (Hartman & Darab, 2012). This approach allows time for students to consider other aspects of the learning experience and the repercussions of what they are learning on how it relates to the social, ethical or moral impacts of these experiences (Swirski & Simpson, 2012). The opportunity for reflection and critical analysis that slower approaches to learning afford contribute to deeper learning related to the various dimensions of experience (Hart, 2004). This approach is seen to empower students and participants to engage more personally and fully in the learning process (Hartman & Darab, 2012).

In a study of participants in a Retreat Leadership Training Program (RLTP), participants perceived that there was not enough time given to relax and get to know each other (Hackett & Lavery, 2012). In response to the observations, Hackett & Lavery (2012) note that there is little reference in the participants’ responses that related to the need for time for deep personal reflection that is core to their training as retreat leaders. They propose that consideration needs to be given to incorporating time for guided reflection by individuals on what they are experiencing and learning.

The inclusion of time to reflect does not mean that the role of setting deadlines and applying principles of speed are excluded within work or learning contexts (Honoré, 2004). Deadlines are seen to contribute to focussing the mind and encouraging people to achieve great things. However, people can get caught in deadline thinking and not take time to rejuvenate themselves. As a result, things like creativity, innovation, relationships and planning can get overlooked in an attempt to meet the deadline (Honoré, 2004).

In the academic context, this tension between taking time to reflect and engage with the curriculum and associated experiences on the one hand and meeting deadlines on the other has led to many academic institutions opting for more economic and expedient approaches that involve setting clear deadlines (Payne & Wattchow, 2009).

The current spiritual direction formation program has also been faced with the challenges of economic and practical considerations in relation to the use of time within the curriculum. It has sought to adopt a balanced approach to the provision of time for students to prepare for learning in critically and contemplatively reflecting on what they are learning while also setting tasks and practical deadlines for students to complete work. This present study explores the extent to which this issue impacts upon the phenomenon under investigation. In the following section, the role of experience is explored in the literature with a view to identifying its contribution to the learning process.

2.2.2 Role of experience in learning.

A distinguishing feature of adult learners is their ability to more readily draw from their own experiences (Forrest III & Peterson, 2006). Skills and knowledge acquired over a lifetime contribute to the approach associated with adult learning (Biggs & Tang, 2011; Kear, 2013). Adult learners interact with new learning by relating it to their past and present personal experiences and expertise (Mezirow, 1991; Ramsden, 2003). The following section reviews literature about the role of experience in teaching and learning.

Definitions of key elements of what is perceived to be “experience” have been difficult to establish (Fox, 2008; Paley, 2014). Fox (2008) challenges the basis on which experience is used as a learning and teaching concept within experiential learning. While recognising experience as a core aspect of the learning process, she notes that “human perception is complex and does not simply record what is “out there”” (2008, p. 43). The complexity of understanding experiences and developing shared meaning is further highlighted by Fox (2008) in the following comments.

We do not know what we know, given the role of unconscious physiological systems and the influence of people and systems outside of conscious awareness. We all learn things without knowing what and when we are learning. This passive learning can be quite substantial and significant. (2008, p. 45)

Understanding the complexity of experiences and their role in the process of learning within an experiential academic context requires more than just describing them as isolated entities. Processing of experiences within academic contexts requires clear structures that enable comparisons to account for the breadth of factors (Fox, 2008). This highlights the need to consider other aspects of experience rather than just cognitive dimensions in examining and critically reflecting on their impact on the learning process. While “experience” can be considered an ambiguous term it continues to be useful to work with on the basis of understanding the relationships inherent in various dimensions of experience (Fox 2008).

One of the central tenets of spiritual direction practice and formation is the development of a holistic approach to the processing of experience both in the director and the directee (Barry & Connelly, 2009; Ruffing 2011). To enable this approach to be incorporated into a formation program, a range of dimensions need to be acknowledged including the dimensions of cognitive, affective, embodied or sensate, intuitive, and spiritual aspects of experience. Each of these dimensions has been investigated in the literature to ascertain their impact on learning processes in educational contexts.

Awareness of the dynamic influences impacting experience constitutes the dimensions of experience (Priestley, 1985). The dimensions of experience in this context are variously defined as consisting of cognitive (Grossman, 2009), affective (Morgan, 2013), intuitive (Schon & DeSanctis, 1986), sensate (Knapp, 2010) and spiritual (de Souza, 2012) dimensions. The cognitive dimension describes the intellectual and conceptual elements of experiences that are generally processed through logical and systematic engagement (Claxton, 2012). The affective dimension refers to a range of emotional responses to lived experiences (Eriksen, 2012). This includes feelings and deeper motivations that are spontaneously evoked in a person in relation to a particular set of circumstances. The intuitive dimension relates to inherent knowledge of situations based on personal developmental factors (Kahneman & Klein, 2009). Intuitive responses are often associated with instinctual patterns of behaviour formed over a life time (Dreyfus, 1997). The sensate

components of experience are associated with aspects of experience relating to the bodily senses such as touch, smell, taste, hearing, sight and physical movement (Fleming, 2001).

Having examined the literature in relation to the various dimensions of experience, how these experiences are analyzed and processed critically is now examined. The role of critical feedback in the learning process is considered in relation to its application within a range of learning contexts.

2.2.3 Approaches to critical feedback.

The influence of critical feedback on the learning process has been recognized as a significant and powerful element in engaging with participants as they develop awareness of what they are experiencing (Hattie & Timperley, 2007). Whether positive or negative, critical feedback has been observed to affect participants in the way they process what they already understand in relation to what is being presented to them through the experiences and interactions they are encountering. According to Hattie and Timperley (2007), the participants can accept feedback offered to them, intentionally seek it out or reflect critically on themselves. Chan, Konrad, Gonzalez, Peters, and Ressa (2014) conceive feedback as being intended to assist participants to move onto the next stage of understanding in relation to what they are learning or encountering.

A distinction between the types of feedback given and the forms they are expressed in leads to a definition of two main types of assessment and feedback associated with learning: *summative* and *formative* approaches (Black & Wiliams, 2009; Chan, Konrad, Gonzalez, Peters, & Ressa, 2014).

The term *summative* approach to assessment and feedback is closely associated with performance measures of learning and tends to relate to quantitative methods of feedback (Black & Wiliams, 1998). This includes the application of grading to the feedback process as a way of conveying the level of a participant's learning against a standard measure or as a comparative measure of their performance against that of their peers.

Formative feedback relates more to the mastery of skills or knowledge as distinct from the performance of the skills and acquisition of knowledge. This approach is generally expressed in qualitative forms of feedback which conveys to participants where interpretations of knowledge are faulty or what aspects of the content of a learning situation have been apprehended or overlooked (Chan, Konrad, Gonzalez, Peters, & Ressa, 2014; Hattie & Timperley, 2007). The application of formative approaches to feedback has been

advocated by Black and Wiliams (2009) as the more effective approach to the promotion of learning in that *formative* feedback identifies more directly with the course content related to the learning goals and outcomes.

For Hattie and Timperley (2007), the effectiveness of feedback relates to three main areas associated with: the goals of the program; the progress towards those goals; and guidance on what comes next. They sum this up in the terms: “feed up” (Hattie and Timperley, 2007, p. 86) in relation to goals, “feed back” (p. 86) when talking about progress and “feed forward” (p. 86) as a reference to the next stage in the learning.

The issue of the nature of feedback in the formative approach to assessment has become the subject of debate (Black & Wiliam, 2009; Hattie & Timperley, 2007). The impact of critical feedback or judgement and positive feedback or praise in the context of different learning situations has been discussed and the effects of each of these approaches related to where the focus of the feedback is targeted. Hattie & Timperley (2007) proposes that positive feedback and praise are not effective forms of feedback if they are related to the person rather than the performance of the person. Referring to situations where participants were being praised without reference to what they have achieved was observed to be ineffective in contributing to the development of skills and knowledge (2007). Giving cues to participants and reinforcing the connection between what they were doing and the learning goals of the program were seen to be effective whether the feedback was framed positively or negatively. The motivation of participants in a learning context was also identified as a factor relating to the effectiveness of positive feedback on learning. When participants are motivated to do a task, it is observed that positive feedback contributes to further motivating them (2007). However, if participants feel obliged to perform a task, positive feedback can act as a demotivating factor in their learning or a sign of manipulating their involvement.

In addressing the issue of feedback in a leadership development context, DeRue and Wellman (2009) note that being able to access feedback improved the chances of gaining positive outcomes. They observed that feedback provided participants with improved self-esteem, lessened the likelihood of personal uncertainty and contributed to the reduction in stress levels. In highly charged learning situations, the role of challenging feedback in promoting learning within a leadership development context was seen to be advantageous until the level of challenge became a distraction to the learning process. They also concluded that where the situation consisted of tasks that were less challenging, the effectiveness of feedback was reduced.

Another factor is the influence of the learning environment on the effectiveness of feedback. The levels of trust and respect generated within a learning environment are identified by Chan, Konrad, Gonzalez, Peters, and Ressa (2014) as being a significant influence on the effectiveness of feedback. They note that when trust was experienced among participants and teachers it resulted in participants coming to see their peers and teachers as sources of learning rather than as threats to their learning. This led to a reduction in the levels of anxiety within all parties involved in the learning process.

The role of critical feedback in the spiritual direction program requires exploration to establish its impact on the learning processes of participants. Flowing out of the processes of feedback are the various approaches taken to integrating what participants are experiencing. Such integration is nurtured by applying the principles associated with the contemplative approach to education. The following section looks at how experiential approaches to contemplative learning are understood in various learning contexts as part of the process of integrating the various aspects of learning.

2.2.4 Experiential approaches to contemplative learning.

The various models of integration explored in this section highlight the diversity of elements involved in processing any experientially-based learning situation. In considering the range of experiential dimensions, the challenge confronting educators has been how to integrate these dimensions into a holistic learning experience (Baumgartner, 2012; English, Fenwick & Parsons, 2005; Tisdell, 2012). The dominant influence of scientific methodologies, focused on objective approaches to learning, has been evident in higher education contexts over several centuries as a result of the enlightenment and industrial revolution (Hart, 2004). Traditional subjective approaches that appear more compatible with studies in the humanities and arts-related academic disciplines have struggled to gain equal credibility within higher academic contexts (Gunnlaugson, 2009; Priestley, 2005). English, Fenwick and Parsons (2005) argue for the thoughtful engagement of the range of subjective elements related to spirituality into the vocational education process. In so doing they propose that a more holistic and integrated approach to learning in higher education contexts can result.

Contributions of subjective approaches to the fields of experiential and transformative education, particularly in relation to adult learning, have gained attention in recent times (Castelli, 2011; Mezirow, 1978, 1991; Erikson, 2012; Gunnlaugson, 2009, 2011; Kolb,

1984). In some adult learning environments a focus on outcome-based learning (Bresciani, Gardner, & Hickmott, 2009) has been contextualized within a more holistic approach to learning that incorporates cognitive, affective and spiritual learning dimensions (Buchanan & Hyde, 2008). These approaches have shifted the attention from the content-driven approaches to curriculum design to a more student-focused (Biggs, 2012) and/or process-focused (O'Hara, 2006) perspective when shaping course material.

These approaches have been further developed to specify core elements of adult learning that are built around reflective learning methodologies (Castelli, 2011; Herbers, Antelo, Ettling, & Buck, 2011). Contemplative education and practice has been one such approach that has been applied within academic contexts and beyond to promote learning based in the lived experience of the participants (Dencev & Collister, 2010; Gunnlaugson, 2011; Repetti, 2010) and inter-subjective approaches built around group reflection and conversation (Gunnlaugson, 2009; Palmer, 2004). These approaches have promoted the broader goals of higher education which have been identified as independent thinking, experiential learning, the ability to solve problems and the translation of theory into practice (Castelli, 2011).

When faculty engage with students' experiences they become aware of what students bring to the learning context (Kear, 2013). The literature relating to engaging students' experiences within the learning context has generally focussed on adult learning styles and learning theory related to processing experiences. A cyclic model of processing experience was developed by Kolb (1984) where experience is critically reflected on with a view to establishing a theoretical understanding of what has been happening to enable the development of new responses to such experiences. This model has subsequently been reworked and further adapted to produce a more holistic approach to the examination of experiences from a range of perspectives (Eriksen, 2012). Other models that are identified as being relevant to the experiential learning process particularly applied within contemplative processes of learning include *Lectio Divina* (Binz, 2008; Hall, 1988) and *Theory U* (Scharmer 2009; Senge, Scharmer, Jaworski, & Flowers, 2004). All these approaches to experiential

learning are now explored to ascertain their suitability as frameworks to guide the development of an educational model of spiritual direction formation.

2.2.4.1 Kolb's cyclic model of experiential learning.

A framework that focused on the processing of concrete experiences became known as the Kolb experiential learning theory (KELT) (Kolb, 1984). This model was built around four aspects of learning; “experiencing, reflecting, thinking and acting” (Joy & Kolb, 2009, p. 71) (See Figure 2.3).

Starting with “concrete experiences” (Kolb & Kolb, 2009, p. 298), students are invited to critically reflect on what they experience with a view to developing “abstract conceptualizations” (p. 298) of what the experience means to them. Based on these *abstract conceptualizations*, students engage in “active experimentation” (p.298) by applying what they have conceptualized to new experiences. The processes outlined in KELT are intended to address the crossover between the different types of knowledge identified by Cooper & Harris (2013) as “experiential knowledge” and “codified knowledge” (2013, p. 449) in the academic context.

Kolb's experiential learning theory provides a framework to assist curriculum designers to develop adult learning methods and approaches that take seriously the role of experience within the academic learning context. Kolb's (1984) model took a strongly constructivist approach to engagement with experience which focuses on the individual's processing of experience and the establishment of relevance and meaning for participants in the learning process (Baker, Robinson & Kolb, 2012).

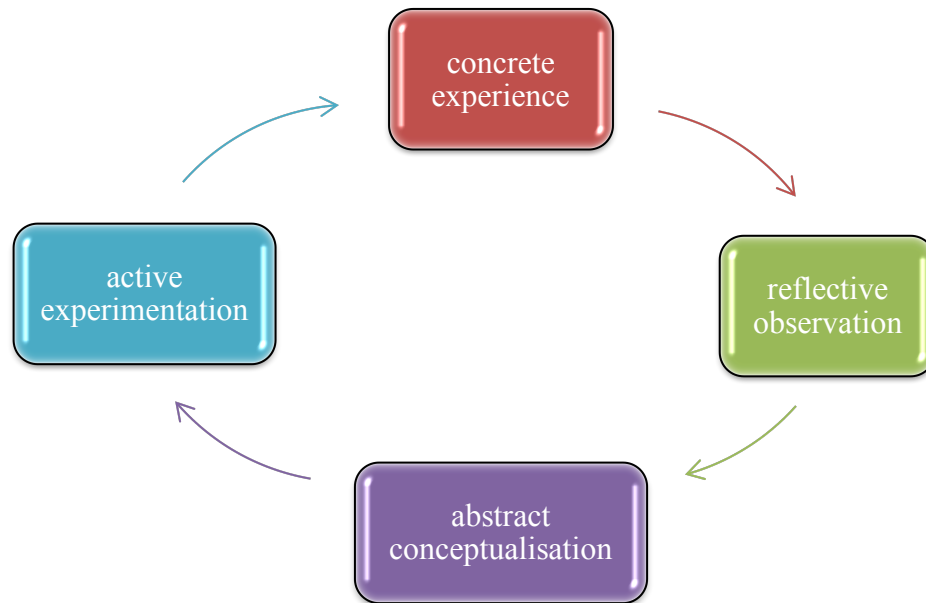


Figure 2.3. Kolb's Experiential Learning Cycle (Kolb, 1984).

In response to the KELT model, Miettinen (2000) argues that the experiential approaches advocated by Kolb (1984) are inadequately supported by research and methodological understandings of learning. He argues that the Kolb model has been limited by its constructivist presumptions which appeared to be too focussed on individual change and the lack of clear sociological awareness of relational factors in the process (Bell, 1993). The key consideration in any approach is that its epistemological foundations are acknowledged to clarify the perspective from which the model has been framed.

Another criticism of the KELT model relates to the “mechanistic” (Quay, 2003, p. 108) ordering of the process that contributes to a failure to embrace the more holistic basis often presumed to be the foundation on which experiential learning practice was formed. The point being made by Quay (2003) has some merit in that Kolb's 1984 model limits the concept of experience to the more objective, concrete aspects of events being considered. There was little acknowledgement of the more subjective aspects of affective, intuitive and sensate elements of experience. The epistemological assumptions underlying Kolb's 1984 model differ from the concept of “immediate personal experience” (Miettinen, 2000, p.61). Direct experience depends on theoretical constructions and symbolic interpretations to define meaning and relationship to others' experiences and interpretations (Miettinen, 2000;

Seaman, 2008). Such aspects of experience as physicality, socially defined relationships and informal elements of experience require more broadly-based models of experiential engagement than that offered by Kolb's model (Brown, 2004; Seaman, 2007). These aspects of experience need to be considered to ensure that any experiential model of learning adequately engages the breadth of lived experience being considered in any learning context, including the spiritual direction formation program.

The teaching methods adopted by Kolb and others to justify their models of learning are also subject to scrutiny. Some of the early experiential models took a narrow understanding of experience to comply with predetermined categories and methods (Seaman, 2008). The learning styles that Kolb (1984) develops in association with his cyclic model are also challenged as lacking in a demonstrable relationship between the various styles (Miettinen, 2000) limiting them to being a "training tool" (Seaman, 2008, p.10). The limits of Kolb's (1984) model in terms of the language used to describe the core elements of the model are challenged particularly in relation to the scope of experiences being considered (Bergsteiner, Avery & Neuman, 2010). The dichotomy between concrete and abstract aspects of experience are critiqued as inadequately distinguished in both the Kolb (1984) and subsequent Svinicki and Dixons (1987) models of processing experiences. It has been argued that a more holistic model is needed based on science, logic and modelling principles (Bergsteiner, Avery & Neuman, 2010).

These observations highlight some of the limitations of the categories presented in Kolb's (1984) model of experiential learning which targeted *concrete experiences* as the prime source of experiential learning. The need to recognize that there is a broad spectrum of experiential elements and factors that include passive and active experiences, conscious and unconscious processing and intentional and unintentional learning highlights the complexity of understanding the role of experience in formal academic contexts (Bergsteiner, Avery & Neumann, 2010).

With a view to developing a more comprehensive model of learning, Kolb and Joy (2009) have translated KELT into styles of learning which are designated as: "diverging,

assimilating, converging and accommodating” (2009, p.71). These styles of learning are as follows:

Diverging learners prefer to make use of concrete experience and reflective observation. Assimilating types prefer to learn through reflective observation and abstract conceptualization. Converging types rely on abstract conceptualization and active experimentation. Accommodating types use active experimentation and concrete experience. (2009, p. 71)

The terms used in the Kolb’s approach resonate to some extent with the field of spirituality, in that students’ experiences become one of the key resources within the learning process (Ingman, 2011; Miller, 2011; Hodge & Derezotes, 2008). The Kolb model (1984) provides a helpful matrix for identifying the means of processing students’ experiences within an academic learning context.

Another model that has developed out of the KELT model is Eriksen’s (2012) experiential learning model which endeavours to address some of the perceived shortcomings limiting Kolb’s focus to concrete experiences. This model is outlined in the next section.

2.2.4.2 Eriksen’s model of authentic becoming.

The formation of spiritual directors encompasses approaches to learning that involve a range of practices as part of the processing of experiences. Recognizing the limitations of Kolb’s 1984 model, Eriksen (2012) built on Kolb’s (1984) cyclic structure offering an alternative approach to processing experiences within the learning context.

Starting with the concept of “lived experience” (2012, p. 704) as distinct from “concrete experience” (Kolb & Kolb, 2009, p. 298), Eriksen (2012) developed the *Model of Authentic Becoming* (See Figure 2.4) which situated the processing of experience in a social constructionist epistemological framework. By starting with *lived experience*, Eriksen (2012) describes a broader awareness of what is encountered in experiences of life particularly related to events that appear unacceptable to the observer. In processing these experiences, he suggests that other factors beyond purely cognitive aspects need to be considered.

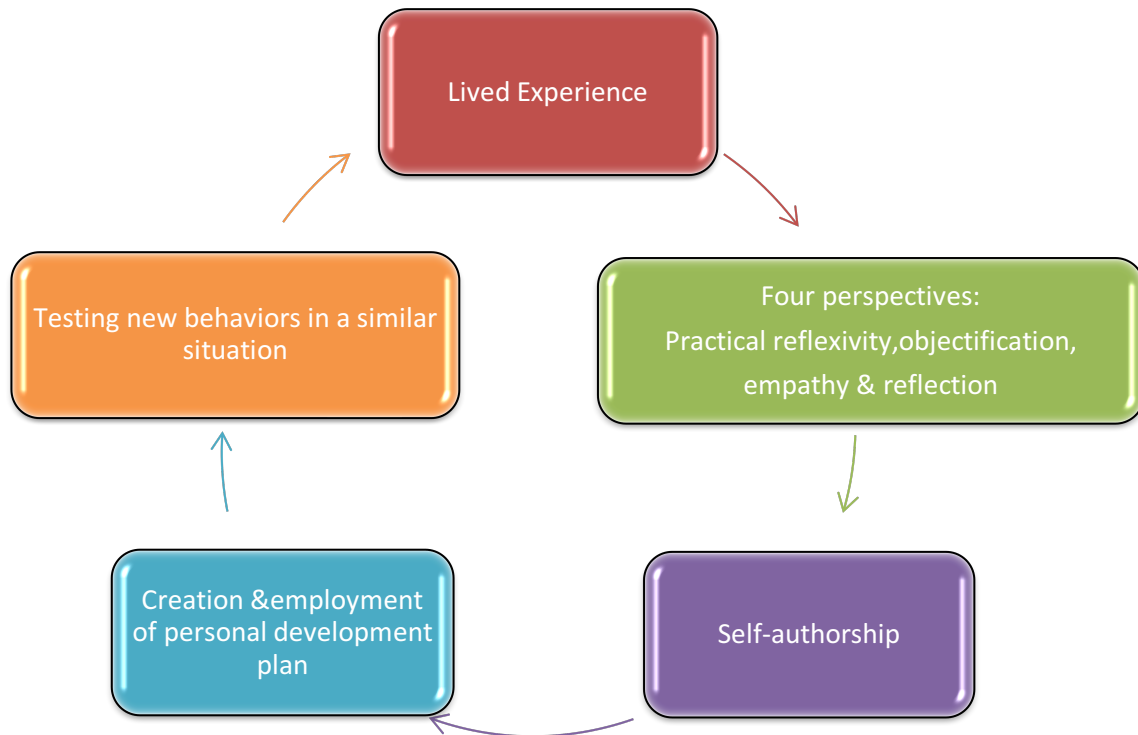


Figure 2.4. Erikson's model of authentic becoming (Erikson, 2012, p. 703).

The model is based on the assumption that meaning is formed out of experiences that are processed in relationship with others (Cunliffe, 2004; Freire, 1972; Kear, 2013). Erikson (2012) proposes that examination of *lived experience* requires other modes of engagement including *practical reflexivity* (2012; p. 704). In this model, *practical reflexivity* refers to the process of considering the implications for others of one's own frames of reference with a view to being aware of "what it is like to live in the experience" (2012, p. 704). Defining practical reflexivity, Erikson (2012) describes it as focusing on "the lived, embodied, and relational nature of organizational life" (2012, p. 716). He collapses Cunliffe and Jun's (2005) terms *self-reflexivity* (2005, p. 229) and *critical reflexivity* (p. 230) into one category of *practical reflexivity*. Cunliffe and Jun (2005) define self-reflexivity as "the conscious act of an existential self, wherein we examine our values and ourselves by exercising critical consciousness" (2005, p. 229). In defining *critical-reflexivity*, they propose that it is "a way of critiquing ideologies, normalized practices, and their consequences. It offers a way of reformulating and expanding the bounds of social and organizational practice by highlighting systemic control structures that reproduce themselves in our discourse and practice" (Cunliffe & Jun, 2005, p. 232).

The assumption, espoused by Cunliffe and Jun (2005), is that self-awareness of personal assumptions and relational and corporate issues are critically engaged together in the processing of experiences. With these assumptions in mind, Eriksen (2012) proposes that processing lived experiences requires four perspectives to be taken into account. As well as *practical reflexivity*, experiences need to be approached considering their *objective and empathetic perspectives* and the process of *reflection* applied to the experiences. *Objective perspectives* relate to the concept of concrete experiences in Kolb's (1984) model where elements of experience are able to be measured, categorized or explained rationally. The more subjective aspects of experience require the application of what Eriksen (2012) refers to as the *empathetic perspective* which accounts for some of the more relational aspects of experience. This perspective involves becoming aware of the impact of experiences on others. *Reflection* in this model echoes similar understandings to its application within Kolb's (1984) original cyclic model.

Flowing from the four perspectives outlined by Eriksen (2012), participants in the process internalize what has been gleaned from examination of the lived experiences and then engage in "self-authorship" (2012, p. 705). *Self-authorship* refers to self-selection of views and relationships in light of what is discerned from the various perspectives in the previous stage of the model. On the basis of the newly revised personal perspectives, participants are invited to embark on the "creation and employment of personal development plan(s)" (p. 705) which would guide them in preparing to test "new behaviors in a similar situation" (p. 705).

The final stage of Eriksen's model includes the testing of what has emerged from the personal development plans to observe how they relate to situations that are similar to the initiating experience. The latter two elements of Eriksen's (2012) model approximate the last two stages in Kolb's (1984) model. The *Model of Authentic Becoming* (Eriksen, 2012) addresses a broad set of assumptions relevant to the practice of spiritual direction. It intentionally accounts for empirical, intersubjective and intra-subjective perspectives (Gunnlaugson, 2009, 2011) in examining experiences. The model also accommodates other dimensions of experience including affective, cognitive, intuitive and spiritual dimensions of lived experiences which are core elements in the learning processes related to contemplative processes of learning (Morgan, 2013).

Eriksen's (2012) model provides a more comprehensive framework for designing experiential learning processes than that offered by Kolb (1984). The inclusion of Cunliffe

and Jun's (2005) distinction between *self-reflexivity* (2005, p. 229) and *critical reflexivity* (2005, p. 230) further refines Eriksen's (2012) model. The acknowledgement of these two distinctive perspectives of self and critical reflexivity (Cunliffe and Jun's, 2005) in the processing of lived experience contributes to further distinguishing the personal and relational aspects of the lived experience. This distinction provides a significant additional level of awareness when examining the findings of this research project in assessing the impact of the curriculum program on the formation of spiritual directors.

While Kolb (1984) and Eriksen's (2012) models tend to be oriented to individual processing of experiences, other experiential learning models reflect a more corporate or collective approach to processing shared experiences. Among them is the *Lectio Divina* model of collectively listening to sacred reading and more recently applied to a range of learning contexts (Binz, 2008).

2.2.4.3 The Lectio Divina model.

The *Lectio Divina* approach (Binz, 2008; Hall, 1988) describes an approach to learning and reflection that was developed in the early centuries of the Christian monastic movement. The approach was introduced to encourage the processing of experiences in relation to Christian scriptures and writings (Hall, 1988). In the 12th century, a Carthusian monk, Guigo II, systemised the practice into a four-stage group approach that included reading a text (*Lectio*), meditating on it (*meditatio*), praying (*oratio*) in response to what was noticed and contemplating (*contemplatio*) the invitation to learning or action that emerged from the process (Badley & Badley, 2011). At a later stage, additional stages were introduced (Binz, 2008). These are the stages of *operatio* (Binz, 2008, p. 95) or action flowing from contemplation and *collatio* (2008, p. 109) or integration of insights into future actions (See Figure 2.5).

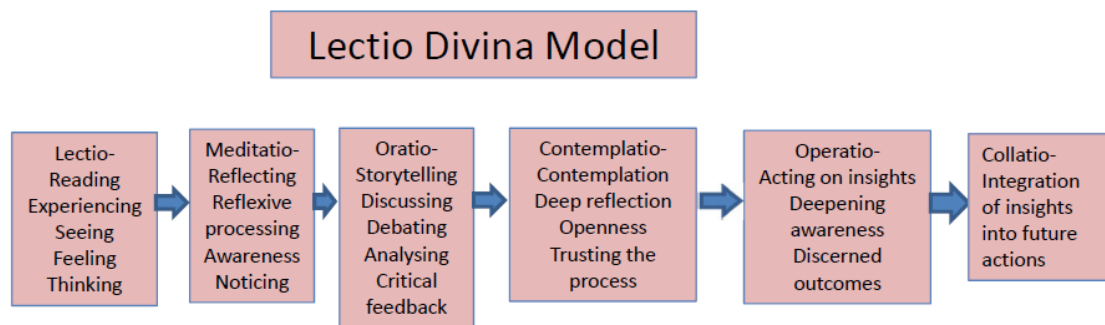


Figure 2.5. The Lectio Divina process (Binz, 2008).

The concept of experiential approaches to learning based on the understanding of the principles reflected in the Lectio Divina approach suggests six distinct phases in the processing of experiences and interactions (Binz, 2008). The first relates to having an open agenda that result from taking time to listen and notice what is being experienced or expressed. A second phase involves participants meditating on what has been experienced to notice the deeper and broader nuances of the experience. Having meditated on the experience, the third phase involves participants giving expression to what emerges from the meditation in the form of a prayer or response that relates directly to the insights gleaned from the experience. The fourth phase involves participants in letting go of their own agendas and taking time to become aware of what they were being invited to notice in light of what was emerging from their contemplation (Badley & Badley, 2011).

In the *Lectio Divina* tradition, *meditation* was distinguished from *contemplation*. Meditation and contemplation were both considered core elements of *Lectio Divina*. However, meditation was understood to refer to the focused reflection on the subject of the read text with a view to noticing the breadth of its expression. In contrast and yet very much related to it, contemplation was considered the process of letting go personal agendas and particular aspects of the experience or content under examination and becoming open to what may emerge as an invitation to new understanding or action (Hall, 1988).

The addition of terms *operatio* (Binz, 2008, p. 95) and *collatio* (2008, p. 109) to the *Lectio Divina* model further extended and clarified the intended outcomes of the process. *Operatio* refers to the active response that flows from the *contemplatio* phase of the *Lectio Divina* process. This phase has resonance with the experimentation phase in Kolb's model (1984) and the creation of a personal development plan and testing it in Eriksen's Model (2012). The term *collatio* describes the integrative nature of *Lectio Divina* in encouraging participants to share and compare reflections within a communal context and apply the

insights and practical outcomes that emerge during the processing of a text or experience with a view to integrating them into their future practices and understandings (Binz, 2008).

The principles associated with the *Lectio Divina* approach to reading and reflecting on experiences suggest a way of engaging with a group contemplative process of learning. Another model, referred to as *Theory U* (Scharmer, 2009), adopts some similar principles to aspects of *Lectio Divina* as outlined in the following section.

2.2.4.4 Sharmer's Theory U model.

The *Theory U* model emerged out of the business development field and applies the principles of contemplative approaches to processing experiences and related decision-making (Scharmer, 2009). This model was developed by Scharmer (2009) in collaboration with his colleagues including Peter Senge, Joseph Jaworski and Betty Sue Flowers (Senge, Scharmer, Jaworski & Flowers, 2004). As the title of the model suggests, the diagrammatic representation of the model resembles a U shape (See Figure 2.6).

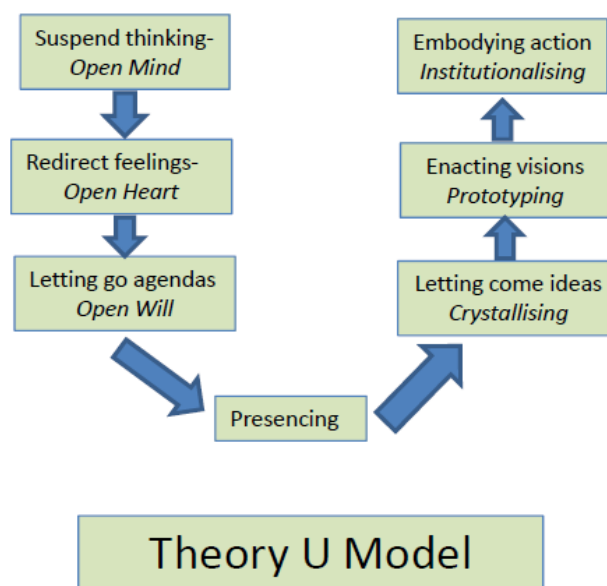


Figure 2.6. The Theory U diagram (Scharmer, 2009).

The *Theory U* approach is developed around seven stages or capacities. The seven stages are *suspending*, *redirecting*, *letting go*, *presencing*, *crystallizing*, *prototyping*, and *institutionalizing* (Senge, Scharmer, Jaworski, & Flowers, 2004). The basic theory behind this approach is that participants, in processing experiences with a view to learning from them, need to pay attention to what they are being invited to discover in the experience. They

are encouraged to start the process by *suspending* previous agendas and perceptions temporarily by making space to observe what is actually happening with an open mind, heart and will (Scharmer, 2009). By *redirecting* the attention away from the conscious analytical processes, participants are urged to notice the affective aspects that also require *letting go* to enable them to enter into, what Scharmer (2007) came to refer to as, *presencing* (p. 10). The term *presencing* refers to the “pre-sensing and bringing into presence – into the present – your highest future potential” (Senge, Scharmer, Jaworski, Flowers, 2004, p. 220).

Having entered into this space of complete openness, participants are encouraged to notice what is emerging in this space by *letting come* (2007, p. 12). *Letting come* refers to the openly passive stance of waiting for insights to emerge from beyond the individual’s ability to generate them through cognitive or rational processing. By paying attention to what is emerging in this process, participants are invited to *crystallize* their discoveries in line with the intentions of the process into ideas, concepts or actions that could be applied to future experiences. In a sense, this phase in the Theory U model has parallels with creating a development plan in Eriksen’s model (2012). The possible distinction between the two stages relates to where the ideas or plans emerge from. Eriksen’s (2012) development plan appears to be created out of the conscious processing of the range of dimensions of experience. In contrast, the *Theory U* step of *crystallizing* appears to emerge out of a less conscious *letting come* process which allows for insights beyond the scope of those consciously processed as a result of the experience. By applying the ideas, concepts and actions that are exposed in the *crystallizing* phase to a particular situation, participants are invited to engage in *prototyping* a possible alternative approach or understanding of the experience that is the subject of their reflection. This phase is similar to Kolb’s (1984) *active experimentation* and Eriksen’s (2012) *testing new behaviours* stages of processing experiences.

There are parallels between aspects of the *Lectio Divina* process and *Theory U* that relate to the underlying principles that are inherent in both approaches and these models are compared in the next section.

2.2.4.5 Comparing Theory U with Lectio Divina.

Conceptually the *Theory U* approach (Scharmer, 2007) to processing experiences relates closely with the latter three stages of the *Lectio Divina* process (Binz, 2008). Like the *contemplatio*, *operatio* and *collatio* stages of *Lectio Divina*, the *Theory U* approach to processing experiences requires participants to suspend their agendas and perceptions and

redirect their attention to noticing the whole. This involves becoming aware of the *presence* of that which in the *Lectio Divina* tradition referred to God or the Divine which expressed the all-encompassing and interconnecting presence in which everything exists (Binz, 2008). In *Theory U*, *presence* denotes that which is “beyond human comprehension” (Senge, Scharmer, Jaworski, Flowers, 2004, p. 219) or “the deepest source of your self and will” (Scharmer, 2007, p. 10).

Both *Lectio Divina* and *Theory U* focus on the corporate engagement in the processing of experiences. The *Lectio Divina* approach incorporates the phases of *operatio* and *collatio* (Binz, 2008) which expresses engagement in collegial sharing, acting and integrating of insights within the context of communal learning. In *Theory U*, terms such as “co-initiating”, “co-sensing”, “co-creating” and “co-evolving” (2007, pp. 6-8) express the intention that the process is based on the collective involvement of participants in the process.

The distinctions between these two contemplative approaches to experiential learning can be analyzed according to where they appear to start and finish. In principle, *Lectio Divina* starts with the processing of the raw experience at the *Lectio* stage which focuses on paying attention without agenda to what is being read or experienced (Badley & Badley, 2011). This prepares the way for participants to enter into the *meditatio* stage where they are invited to specifically pay attention to various aspects of the experience and ponder their relevance to their lived and concrete experiences (Binz, 2008).

In an educational context where *Lectio Divina* has been applied, the third phase of *oratio* suggests giving expression to what was noticed in the previous two phases. As Flanagan (2014) suggests, this could relate to the initial findings of a research project. The identification of these initial phases of processing experiences are not directly articulated within the *Theory U* model. This implies that there is an assumption by Scharmer (2007) that these first stages of the *Lectio Divina* approach pre-exist the stages outlined in the *Theory U* model. The stages of the *Theory U* model appear to commence at the *contemplatio* stage of the *Lectio Divina* model. Scharmer (2009) prefaces the *Theory U* model with the need to start the process with observation. His explanation of the preparatory stages of observation in the *Theory U* model is not as explicitly outlined as in the *Lectio Divina* model.

On examination of the next phase of engagement with these models, the *Theory U* model provides a more specific set of stages related to the application of contemplative principles rather than those articulated in the *Lectio Divina* model. While the *Lectio Divina*

model describes the approach to the *contemplatio* phase in broad terms, the *Theory U* model delineates three stages of preparation in entering the *presence* phase of the model which closely relates to the *contemplatio* phase (Scharmer, 2007).

According to the *Theory U* model, participants are required to *suspend* their intellectual processing of the experience related to having an *open mind*. The second stage asks them to *redirect* their attention to affective and sensate dimensions of their experience by approaching the reflective process with an *open heart*. To enable entry to the state of presence, the third step was to *let go* of their desire to work things out and come with an *open will* to the place of noticing what is emerging in the learning space of presence (Scharmer, 2009). By identifying the three stages of preparation for engaging with the phase of contemplative presence, Scharmer (2009) has spelt out the principles that underlie the *Lectio Divina* phase of *contemplatio* in a way that more directly guides participants in noticing the various elements of preparing to contemplate.

In distinguishing the various stages, Scharmer (2009) highlights the need within the contemplative process to be consciously open to the influence of thinking, feeling and motivational factors on the processing of experiences. While these factors were assumed in the *Lectio Divina* model, the Theory U model articulates the stages involved in ensuring that they are accounted for in processing experiences. Again there appears to be resonance between the three stages of preparation and Eriksen's (2012) second stage where he included the practical reflexive, reflective, empathetic and objective elements into the processing of the lived experience.

The other aspect of these models that differ in detail concerns what occurs as a result of what emerges from the contemplative process or presencing stages of both models. In more recent times, the addition of the *operatio and collatio* stages to the traditional *Lectio Divina* model (Binz, 2008) has enhanced the model and brought it more into line with the *Theory U* later stages. These terms embrace a range of elements that generally suggest the need to find active or intentional expression for what emerges from the contemplation. The *Theory U* model provides more specific guidance to participants by proposing the three stages of *crystallizing, prototyping and institutionalizing* that to some extent mirror the processes of *operatio and collatio* in the *Lectio Divina* model.

The stage of *Theory U* that is identified as emerging from the presence stage is described as *letting come* which mirrors the final stage of enter into *presence* of *letting go*

(Scharmer, 2009). By using the term *letting come*, Scharmer is describing the intentional process of passively noticing what is emerging without the need to intellectually try and work it out. This minimizes the influence of personal agendas in arriving at an outcome based on the contemplative process. The *Theory U* model describes the second stage emerging from the *presencing* stage as *prototyping* which describes the process of integrating the insights that emerge from the contemplative stage. Scharmer (2007) specifically refers to the need to incorporate the intellect or *head*, the affective or *heart* and the senses or “*hand*” (Scharmer, 2007, p. 11) in integrating the outcomes that emerge from the process of *letting come*. This stage provides opportunity for the participants to relate what has emerged from the contemplative stage of *presencing* to possible actions, strategies or understandings that inform their future responses to similar experiences or situations.

The third stage after the *presencing* stage is described by Scharmer (2009) as the *institutionalizing* stage where participants in the process are encouraged to embody or apply what has emerged in relevant situations. The equivalent of these stages is not spelt out in the same detail in the *Lectio Divina* model. The traditional assumption is that participants in the *Lectio Divina* process would openly engage with what emerges from the contemplative process and actively respond to what they are being invited to learn or do broadly described in the terms *operatio and collatio* (Binz, 2008).

The *collatio* phase of *Lectio Divina* reflects the communal or collective nature of this approach to reading and processing experiences (Binz, 2008). The Latin term *collatio* describes the process of gathering together or comparing ideas. In the process of listening to and reflecting on what has been shared within the gathered community, participants are encouraged to share and engage in the critical reflective processes of comparing their emerging insights with each other to come up with a collective response to experiences. This aspect of the *Lectio Divina* approach has some resonance with the *Theory U* concepts of “co-initiating”, “co-sensing”, “co-creating” and “co-evolving” (Scharmer, 2007, p. 6). In identifying these movements within the *Theory U* model, Scharmer (2007) notes that *co-initiating* relates to a shared collective intention that involves being open to each other and to the world around them.

The term designated by Scharmer (2007) as *co-sensing* describes the movement of openness to observe and explore a situation together that motivates and deepens the ability of groups to sense what is emerging among them. These movements prepare the way for participants as a group to enter into the *presencing* movement described previously as

involving the *letting go* of “the non-essential aspects of the self” (2007, p. 7) and being open to the emerging future possibilities for the group.

Flowing on from this stage in the Theory U model, Scharmer (2007) identifies the *co-creating* movement as referring to the process of jointly contributing insights. The intent is to create prototypes that are based on an open minded and active experimentation by the group rather than individual analytical processing of insights. The *co-evolving* movement followed the *co-creating* movement to develop prototypes and assess their effectiveness in terms of their impact in a broader context. By engaging stakeholders and others impacted by the decisions about the situations, the collective group critically determines which prototypes or aspects of prototypes have the greatest impact on the situation being addressed.

While both *Lectio Divina* and *Theory U* models are based on collective approaches to processing situations, the *Theory U* model (Scharmer, 2009) provides a more comprehensive application of the principles of group processing of experiences and situations. The “co-initiating”, “co-sensing”, “co-creating” and “co-evolving” (Scharmer, 2007, p. 6) movements described above convey a more developed strategy of group engagement than the *Lectio Divina* terms *operatio* and *collatio* express when describing the post contemplative stage (Binz, 2008). The shared interest in the role of the collective or groups of participants in the community in both models is a factor that needs to be considered in discerning the implications of this study. This is to establish which aspects of the *Lectio Divina* and *Theory U* models contribute key insights to the manner in which participants learn in the spiritual direction course.

The various models of experiential and contemplative processes of learning outlined above require further exploration to ascertain whether they reflect the approaches to learning identified in the findings of this study. They offer a variety of frameworks against which the approaches taken in the spiritual direction formation program can be compared and contrasted. These frameworks assist the researcher to distinguish between the various elements in the learning context that influence students’ processing of experience. Establishing clear frameworks for the design of spiritual direction models of learning and processing experiences assist program formators in guiding participants to learn more effectively.

The relational and contemplative processes of learning provide some guidelines for the development of curriculum and adult learning frameworks that can be applied to the design

of spiritual direction formation programs. However there are also contextual factors that impact the learning processes for participants in a spiritual direction formation program which are explored in the following sections. One of these is the role of formators in the learning process.

2.3 Role of Formators in the Learning Process

The role of formators has been described as a hidden curriculum factor, not written into the formal curriculum, that can impact the learning process both positively and detrimentally (Phillips & Clarke, 2012). The role of teachers in the learning process has been explored in research to identify factors that contribute to engagement with learning (Cecero & Prout, 2011, 2014; Sorenson, Derflinger, Bufford, & McMinn, 2004; Zajonc, 2006). These factors include: the personal attributes of formators, approaches to teaching, the influence of power on formator/participant relationships and the impact of modelling and mentoring on learning process.

2.3.1. Personal attributes of formators.

The following section explores some of the attributes and factors that have been identified as contributing to and detracting from the learning process. In terms of relational factors, attachment theory has been explored to determine how participants' interactions with their teachers and mentors impacted upon their learning. Sorenson (1997) defines attachment theory as "a quest for a particular kind of affective contact with an other" (p. 532). He argues that students come to see their professors or mentors as substitute carers and, as such, relate to them in a manner that suggests affective forms of attachment.

Subsequently, Sorenson joined by others in a study that endeavoured to identify the attributes that students recognize as qualities which signify their relational attachment to teaching staff within the learning context (Sorenson, Derflinger, Bufford, & McMinn, 2004). Their findings indicate that participants or students responded best to mentors or teachers who were able to be fully present to them both personally and affectively. Students were looking for teachers and mentors who modelled how they process curriculum material and interact with students and peers.

Two studies by Cecero and Prout (2011, 2014), looking at the role of teachers, explore the effect of the spirituality of faculty members on the style they adopt within the learning context. In surveying students to determine which factors influenced them most, Cecero and

Prout (2011) identify the traits of *altruism*, *curiosity* and *temperance* as having a significant impact on students. *Altruism* refers to manifestation of interest in student welfare that goes beyond the requirements of their institutions or the information they were expected to transmit. The term *curiosity* describes the openness of faculty members to go beyond the limits of information transfer to creatively engage in new and challenging concepts and approaches to learning. *Temperance* encapsulates personal characteristics of being self-controlled and humble in considering the needs and concerns of others (Peterson & Seligman, 2004). These traits, identified by Cecero and Prout (2011), contribute to the prediction of teaching styles adopted by the faculty members based on their spirituality. They reflect an attractiveness and sensitivity of the faculty in the perception of students.

An additional factor was identified in a second study by Cecero and Prout (2014) where *shared suffering* was a trait that students recognized in faculty members. An item in their survey that stated “The professor joins the students in their suffering and demonstrates that they have suffered as well” (2014, p. 109) rated highly in the transcendence scale of the survey. In explaining the significance of this response, Cecero and Prout (2014) propose that it relates to the ability of faculty members to acknowledge the suffering of others and to respond meaningfully to them.

Zajonc (2006) identifies a list of traits that relate to what he termed the “epistemology of love” (2006, p. 1745) in contemplative approaches to inquiry. These traits include *respect*, *gentleness*, *intimacy*, *participation*, *vulnerability*, *transformation* and *insight* as key elements of the contemplative engagement. Relating these traits to those in previously mentioned studies, suggests some overlap of attributes but identified in different terms.

Respect, *gentleness* and *participation* have some resonance with Cecero and Prout’s (2011) attributes of *altruism* and *temperance*. The *affective* elements in Sorenson, Derflinger, Bufford and McMinn (2004) could parallel the term *intimacy* in Zajonc’s (2006) list. The concept of suffering with and sharing one’s own suffering in Cecero and Prout’s (2014) study may relate at some levels with vulnerability as expressed by Zajonc (2006). As Zajonc (2006) describes vulnerability, it is being “secure enough to resign ourselves to the course of things...to be comfortable with not knowing, with ambiguity and uncertainty” (p. 1747). The ability of formators and teachers to place themselves in situations that may result in suffering or challenge, as Cecero and Prout (2014) suggest, enabled them to be aware of the vulnerability or suffering of others including their students.

In a study of medical students, the impact of conflicting views and beliefs of teachers on students indicates reluctance on the part of students to challenge their teachers for fear of jeopardizing their future career prospects (Phillips & Clarke, 2012). Awareness of hierarchy within the medical fraternity discourages students from speaking up and contesting what is being presented. While participants in the study were reluctant to acknowledge the influence of teachers' roles on their learning, Phillips and Clarke (2012) conclude that hidden curriculum factors such as the effect of teachers' dissonant views impacts students learning. This study (2012) highlights the need to be aware of the way in which teachers and formators engage with students and participants in sharing their views particularly in adult learning situations. Consideration in this study is given to exploring the culture of learning as it may be a factor in the way teachers and students respond to conflicting views and beliefs.

A spiritual direction formation program is a learning situation where the qualities of personal integrity and openness are core to vocational practice (Pickering, 2008). A focus of this research is to discover whether the personal attributes of formators are a relevant factor in the manner in which they approach teaching. The role of the formators in the process of training spiritual directors is explored in chapter 5 of this thesis to identify which factors relating to their roles contribute to participants' learning in a spiritual direction course. The elements that relate to formators approaches to teaching are considered the next section.

2.3.2 Approaches to teaching.

Traditionally the role of tertiary teachers as experts has been generated out of higher education approaches based on lectures and academic research (Borredon, Deffayet, Baker, & Kolb, 2011). More recently, these approaches have been challenged and the role of teaching staff has been reviewed particularly in adult learning contexts.

Several studies suggest that when teachers model what they teach, they promote significant levels of achievement in learning outcomes amongst their students (Foster, 2007; Garzon & Lewis Hall, 2012; Hall, Ripley, Garzon, & Mangis, 2009). When teachers shared their own experiences with students, it contributes to promoting the engagement and personal sharing of those students (Ball, 2012; Naidoo, 2011). The open sharing of experience between the teaching staff and students in adult learning programs has been found to influence the integration of learning for students (Garzon, & Lewis Hall, 2012; Sorenson, Derflinger, Bufford, & McMinn, 2004; Steibel, 2010). In a ten-year study, Sorenson,

Derflinger, Bufford and McMinn (2004) discovered that students integrate their learning through relational factors in educational contexts.

Key to relationships between teachers and students is “modelling before the students’ eyes in ways to which students feel they have real access personally, perhaps even as collaborators in the project together” (Sorenson, Derflinger, Bufford, & McMinn, 2004, p. 364). The ability of teachers to engage fully with students both intellectually and relationally through modelling what they are teaching is seen by students as a major influence in enhancing their learning.

The role of teachers in experiential learning environments challenges some of the traditional roles teachers have assumed in the past. In many cases, previous roles focused on more authoritarian and hierarchical understandings of the teacher (Castelli, 2011). New paradigms for teacher and student relationships have focused more on teachers as colleagues, confidants, and companions (Giles & Anderson, 2008). Teachers’ ability to maintain a focus on relationships between themselves, students, wider society and the curriculum content is also seen to be a significant part of their role in the promotion of their own and the students’ inner transformation and learning (Ball, 2012). The modelling of integrity by the teaching staff in the context of shared life experience has been noted as a key factor in promoting the engagement and personal disclosure of participants in the learning process (Naidoo, 2011; Steibel, 2010).

The concept of integrity has been further extended to suggest that teachers are actually co-learners (Groen, 2010). Teachers and students can both make equally valuable contributions to the learning process (Giles & Anderson, 2008). The relationship between them needs to be reciprocal and interdependent (Gunnlaugson, 2009; Giles & Anderson, 2008). This is understood to be due to the respect teachers have for learners, conveyed by their tone and how they handle conflict (English, Fenwick & Parsons, 2005; Vella, 2000).

As Palmer (2007) has noted, the *teacher-centred* approach to learning assumes the teachers’ role to be prominent in the learning process. This approach tends to give weight to academic rigor while limiting the recognition of students’ contributions. A *student-centred* approach appears to be a reaction to the excesses of the *teacher-centred* model. This latter approach shifts the focus to what the students bring to the learning context and results in what Palmer (2007) describes as a “tendency toward mindless relativism” (2007, p. 122). This

suggests the need for a third way which Palmer (2007) described as a *subject-centred* approach to learning.

In the *subject-centred* approach, the focus is on what is being studied and ideally recognizes the equal contributions of teachers and students in the process of learning. For Palmer (2007) this approach represents true community in which all parties are made accountable for their learning. Palmer (2007) rightly warns against the dominance of either party within the learning context and calls for accountability beyond the people involved in the learning process. This approach appears to assume a lot about the relational dynamics that exist within any learning context. In practical terms, egalitarian structures can facilitate creative learning environments. However, they can also equally disintegrate into dysfunctional anarchy. In exploring the dynamics of a spiritual direction formation program, this study identifies how significant the role of formators is in facilitating the active involvement of participants in the learning process.

The self-awareness of teaching staff is vital to the effectiveness of the program in producing the desired outcomes of forming participants spiritually in a holistic and balanced manner (Groen, 2010). Teachers applying affective and spiritual dimensions of learning need to pay attention to their own self-awareness particularly in the area of spirituality (Buchanan, 2010a; de Souza, 2009). Teachers require a clear discernment of their own intentions and their employing organisation's intentions when considering their role in the learning environment (English, Fenwick & Parsons, 2005). This includes awareness of the importance of the teacher's own inner journey and its relationship to ethical practice which is crucial (Ettling, 2012). Palmer (2007) observes that effective teaching is influenced by the teachers own integrity and personal engagement with the material they are teaching (Foster, 2007). Various studies indicate that teachers model the process in their own lived experience by creating an environment that requires students to engage in the experiential aspects of learning (Buchanan & Hyde, 2008; Buchanan, 2009; Tisdell, 2008; Giles & Anderson, 2008). Focussing on self-awareness is also considered as a way for teachers to be aware of their own agendas and learning in relation to potential dualistic perspectives in their approaches to teaching and relating to students (Gunnlaugson, 2009)

The formators' personal attributes and approaches to teaching are explored in this study to establish whether these factors relate to a positive impact on participants' learning. Related to the role of formators is the influence of power differentials on relationships between

participants and formators' within the learning context. These power differentials are addressed in the following section.

2.3.3 The influence of power on formator/participant relationships.

Historically, spiritual direction has been associated with the role of priests or pastoral leaders within religious communities (Ruffing, 2011). This means that up until midway through the twentieth century, men predominated in the work of spiritual direction. As a result, control and power relating to decisions about who could participate in spiritual direction and how they were trained was controlled and regulated by male religious authorities.

Since the Second Vatican Council reforms came into effect, the involvement of a broader group including women and non-religious practitioners has raised issues of appropriate responses to control and power within spiritual direction formation and practice (Wirth, 1997). While reducing the impact of control by hierarchical structures, the new era in spiritual direction means that there are fewer accountability structures in place to cover the growing diversity of practitioners emerging from outside formal religious structures. Attention to the issues of the appropriate application of power and control within the spiritual direction vocation has led to the development of codes of ethics that guide spiritual directors in their practice and formation (AECSD, 2015). This attention focuses attention on formation programs not only teaching appropriate approaches to power and control in spiritual direction but also modelling it in the way formation occurs (Wirth, 1997). These factors are explored in the following sections as part of the investigation of the role of formators in the formation of spiritual directors.

Awareness of power issues in relationships between formators and students has been a central concern in teaching, supervision or mentoring contexts (Darwin, 2000; English, Fenwick & Parsons, 2005; Wirth, 1997). The influence of power on the relationship between formators and students has been scrutinized to ascertain its impact on the formation of spiritual directors (Wirth, 1997). Understanding spiritual direction formation as a very personal, sensitive and vulnerable process, Wirth (1997) identifies awareness of power relationships between participants and formators as a significant factor impacting the learning environment. Formators assert power in the form of control within a range of aspects of formation and learning processes. These include their role in selecting who comes into the program, who continues in the course and how assessment is managed (Wirth, 1997).

Choices related to course content and structure, evaluation methods and adult learning approaches in general are all controlled by formators. Even the choice to invite students to contribute to the decisions about any or all of these processes remains in the control of the formators to accept, reject, or modify the outcomes of these decisions.

The balance of power within learning contexts also raises issues relating to the influence of gender, culture and social status on the way power has been applied (Darwin, 2000). This has been historically relevant in the vocation of spiritual direction where gender has played a dominant role in dictating who could or could not be a spiritual director and what approaches were taken to spiritual direction. Without careful attention to power relationships within the twenty first century learning environment, formators can “contribute to oppression and silencing” (Butterwick & Lawrence, 2009, p. 44) of participants. With this in mind, this study considers how formators respond to these challenges particularly as they relate to the spiritual direction formation program where vulnerability and openness are key factors in the formation of spiritual directors.

In addition to power issues in the learning space, the issue of power in spiritual direction practice, which has been a relationship of vulnerability between spiritual directors and directees, need to be investigated. This is to establish how formators convey the principles of appropriate power in the way they teach (Brookfield, 2006). The issue of power in spiritual direction practice requires exploration of how formators teach appropriate power relationships and model it in the formation process (Ettling, 2012).

Formators also need to maintain a level of control to ensure a safe and optimum learning environment. This raises the issue of how formators balance the need for control of the learning process and their application of autonomy within the learning context (Weimer, 2013). The issue of appropriate control and safety also relates to how formators address power relationships between participants and their peers within the learning context (Ettling, 2012). Balancing power is observed to be part of a wider agenda that applies an ethic of justice, care and appropriate levels of critique within what are often diverse learning communities (English, Fenwick & Parsons, 2005).

As well as being aware of the power dynamics that exist in their relationship with students, the concept of empowering students has also been raised as another influential factor in the learning process (Cranton, 2010). This involves the responsible application of power by formators in establishing procedures that enable the sharing of control and power

with students within appropriate aspects of the learning context (Brookfield, 2006; Cranton, 2011). Enabling students to voice their thoughts and ideas has been a key element in empowering them in the learning context. To assist students in this process, it has been proposed that formators need to be proactive in promoting discussion and dialogue incorporating a diverse range of perspectives from participants in the learning context (Cranton, 2010). Promoting self-directed learning, formators also advance the empowerment of students through self-evaluation, reflection on experience and open and explicit decision-making processes within the learning context (Knowles, 1975).

As well as empowering students to participate in the learning context, Schwartz (2012) considers it important that formators set boundaries to distinguish their role as professionals from their personal interactions with participants. Role boundaries need to be intentional and transparent to enable students to “deepen their awareness of power and positionality, distance and connection” (Schwartz, 2012, p. 102). While this position presents an ideal view of the positive contribution of boundaries in the learning context, it can be argued that the establishment of boundaries can also be seen to reinforce the sense of power and act as a block to student engagement. In light of earlier discussion of the importance of personal and affective engagement of formators with participants (Sorenson, Derflinger, Bufford, & McMinn, 2004), the issue of how the formators balance the advantages of clear structures with personal engagement needs further investigation.

The appropriate application of power relationships and related boundaries appears crucial if formators are to be effective in positively contributing to participants’ learning and interactions within the spiritual direction learning context. This aspect of the formators’ roles and relationships with participants requires further attention when exploring the findings to establish how they position themselves to enhance the participants’ learning within the spiritual direction course. Another aspect of the formators’ role relates to the impact of mentoring and modelling on the learning process.

2.3.4 The impact of mentoring and modelling on the learning process.

In the spiritual direction formation program, mentoring takes place in individual and group contexts in the form of personal and peer group supervision. These sessions provide opportunity for students to reflect on their fieldwork experiences with their peers and an experienced practitioner. Daloz (2012) has concisely described the role of mentor in the following statement.

Mentors are guides. They lead us along the journey of our lives. We trust them because they have been there before. They embody our hopes, cast light on the way ahead, interpret arcane signs, warn us of lurking dangers, and point out unexpected delights along the way. (Daloz, 2012, p. 18)

This description sums up some of the key attributes that students look for in teachers to empower them and encourage their self-directed learning (English, Fenwick & Parsons, 2005; Zachary, 2000). Key to understanding the role of teachers as mentors has been the mutual and reciprocal relationship of mentors in adult learning situations (Daloz, 2012).

A critique of the mentor relationship as applied within workplace contexts notes that these relationships generally echoed hierarchical structures inherent in business management (Darwin, 2000). This occurs when the mentor becomes the influential senior partner in the one-on-one relationship. Darwin (2000) argues that mentoring in workplace contexts could be seen as a “recycling of power based on the assumption that mentoring is a power-dependent, hierarchical activity, which initiates the protégé and renews the mentor” (2000, p. 203). These observations highlight the need, as outlined previously, for self-awareness of those in one-to-one mentoring roles as to how their relationship with a mentored student is managed in terms of control and power. The case can be argued that positive mentoring relationships involve the integrity of the mentor and a collaborative approach in the way formators engage with those they are mentoring.

Group mentoring, referred to as “mentoring circles” by Darwin and Palmer (2009, p. 125), is considered to be conducive to shared learning. This conclusion is based on a study carried out among a university faculty who observed participants benefit when there is a collaborative atmosphere within the groups (Darwin & Palmer, 2009). The study also notes that the success of groups relies on the commitment of the participants in the group and whether there is a facilitator present. This suggests that the role of facilitator/mentor in the process is influential in providing guidance for the group in the learning process. The question is raised about the significance of the role of facilitator/mentor in the process of guiding groups in their learning based on their own approach to engaging with the members of the group.

In a study of group learning in a French university, the role of the mentor, referred to as the *learning manager*, was significant in the effectiveness of learning within facilitated groups (Borredon, Deffayet, Baker, & Kolb, 2010). In examining the introduction of learning

teams in a French higher education context, it was found that when the learning managers understood their role as facilitators of group interaction, the students engaged with the learning process. The role of facilitator/mentors involved *learning managers* in engaging participants in the groups by “ensuring respect for ground rules, listening, and questioning as appropriate” (2010, p. 345). The emphasis in this study was on the active role of learning managers to control the learning environment rather than to put the focus on their modelling appropriate approaches to engagement through listening and asking questions. The distinction between the controlling approach and the modelling approach suggests the need to be aware of the dynamics in the way formators in the spiritual direction course approach their mentoring roles.

Le Maistre, Boudreau & Pare (2006) in examining the role of teachers in the learning context developed the following check list of actions that need to be considered in guiding students through mentoring processes.

- clarify and refine evaluation rules so that they are understood by all stakeholders;
- operationalize intangibles as well as possible in a way that can be agreed on by all stakeholders;
- as far as possible, separate the role of mentor and evaluator;
- if this is not possible, train and support the supervisors as they mentor and evaluate students, especially in the skills of observation and communication;
- train and support beginners in self-evaluation and communication;
- encourage dialogue between supervisor and newcomer; and
- encourage on-going formative evaluation so that there are no surprises in summative evaluation. (Le Maistre, Boudreau & Pare, 2006, p. 353)

This approach supports the observation that mentoring is a complex and dynamic notion that requires further consideration before applying it within adult learning situations (Zachary, 2000). In examining mentoring as applied in the personal and peer supervision groups in the spiritual direction context, the power relationships and commitment of students to participate in the groups need to be assessed to ascertain their impact on the formation and learning processes within the program. The issue of power relationships also raises questions about the role of teachers in facilitating these mentoring contexts in terms of the extent to which they contribute to and determine the process of learning.

Slightly different from mentoring is modelling. Teachers may model openness and vulnerability by not requiring students to do anything they would not do themselves (Ettling, 2012). Their transparency and willingness to engage students in shared decision-making and evaluation is conceived as promoting the balancing of power (Weimer, 2013). Others have proposed the need to further investigate teachers' modelling of qualities like "trust, intimacy and empathy in the learning environment" (Taylor, 2007, p. 188) to establish their contribution to the students' integration of course content (Baumgartner, 2012). Another study explores the need for warm and clear structures to promote openness and sharing within the group setting (Colwell, Kiesling, Montgomery, & Sorell, 2006).

In each of these cases, the propositions being presented highlight the need for integrity in the way formators or teachers model what they teach. However, there needs to be a correlation between the manner in which teaching occurs and learning goals. These studies propose that it is the role of teachers to model personal integrity. By doing so, they promote the acquisition of knowledge, demonstrate the skills and methods associated with the focus of formation and express perspectives that reflect their intentions for student learning (Foster, 2007).

The relationship between how the spiritual direction formators model the curriculum content and the learning goals requires further exploration. Attention to the various aspects of how modelling impacts the learning process is a focus of the consideration of the findings of this study.

2.3.5 Summary of the role of teachers in learning.

The formators' personal attributes and approaches to teaching, including power relationships and modelling have been explored in the literature to ascertain what has been proposed as possible impacts of these aspects on participants' ability to engage with the learning process. An examination of the various mentoring or modelling roles enacted by formators has been explored to establish what researchers are saying about how effective they are in the facilitation of learning. Understanding the importance of mentoring and modelling has the potential to optimize the benefits to participants in how they engage with their learning.

Having explored the role of the formators in the learning process, the following section explores another contextual issue related to the way the learning community influences participants' learning.

2.4 The Role of Community in Learning

In this section of the review, literature about the impact of community on learning in its various forms and configurations within and beyond formal contexts is investigated to consider its contribution to participants' formation as spiritual directors. The community in this study refers to the structured and unstructured situations in which participants and formators in a curriculum program engage together to advance learning.

The understanding of adult approaches to learning has been identified for consideration in the approaches to learning that provide participants with the ability to interact with course content (Floyd, 2012). In addressing adult learning, Floyd (2012) isolates four core aspects relating to their approach to learning as “identity, community, responsibility and body of knowledge” (2012, p. 951). *Identity* refers to how participants develop their identity both at a personal and professional level through engaging with the learning process (Floyd, 2012). The term *community* expresses the concept that learning is not an isolated process. Colleagues, educators, institutions and the broader community are all contributors to the process. This highlights the role of *community* in the learning process as discussed in the previous section of this literature review. The acknowledgement of accountability structures associated with professional vocations highlights the need for *responsibility* particularly as the learning relates to relationships with clients or employees, or ethical standards and expectations of the community. The fourth aspect that Floyd (2012) identified is *body of knowledge*. This element shapes the manner in which the curriculum is designed and dictates the approaches applied to engage participants in the learning process. In the past, this aspect of adult learning has gained the greatest consideration when designing curriculum programs.

Floyd (2012), however, proposes that there is a need to consider equally all four elements with a view to optimizing the approaches to learning by broadening and promoting more concrete outcomes to form participants in their chosen professions or vocations. These key elements provide an outline and set of terms that can be applied in identifying the aspects of the formation program that are relevant to the adult learning context and what emphasis is applied to each of them.

This section focusses on aspects of the learning community that particularly relate to the effective group engagement of participants in the learning process. These include: group safety, identity issues in a diverse community, and the impact of cooperation and interconnectivity on learning.

2.4.1 Group safety.

The complex nature of community is defined by the unpredictable and dynamic nature of the relationships that constitute any collective engagement whether large or small. In educational and learning contexts which are generally based in collective or group contexts, the complexity of relationships has been raised as an issue related to the safety of all parties in the learning community. This has resulted in the exploration of aspects of safety particularly in academic and vocational training contexts. This section explores the literature related to: the focus on safety, responsibility for safety, and approaches to safety

2.4.1.1 The focus on safety

The focus on safety refers to the issues and actions that potentially negatively impinge on the safety of anyone involved in the learning process. These safety issues could relate to physical, emotional or psychological threats or distortions. The identification of the focus of safety in a learning community assists teachers and students to understand the responsibilities and mechanisms needed to address the issues generated (Boostrom, 1998).

In adult learning contexts, the issue of safety has tended to be focussed on psychological and emotional concerns (Kisfalvi & Oliver, 2015). This relates to the conscious and unconscious elements of interactions between participants in a learning situation that could lead to distorting or denying contributions from individual participants (2015). This has been particularly identified in experiential learning contexts in which subjective and intersubjective engagement involve participants sharing very personal insights in relation to their experiences. In contexts where the objectivist approach has been applied, the assumption has been that the knowledge and insights that participants share are separate from or external to them which Palmer and Zajonc (2010) refer to as the “objectivist myth” (p. 27). The fact that the mind, body and emotions are all interrelated suggests that what happens to one element of experience impacts on the other aspects of a person.

Issues of safety are not just focussed on the participants or students in a program but also relate to the teachers or formators (Garraan & Rasmussen, 2014; Kisfalvi & Oliver, 2015). The support and protection of students and participants is highlighted by Kisfalvi and Oliver (2015) when they note that the relationship between the teacher and the student are like the relationship between therapist and client as expressed by Winnicott (1965) using the term *holding environment*. This term refers to the context of providing for the needs of

someone in your care that goes beyond the physical aspects of caring. Using the concept of *holding* to describe the provision of safety in a learning context, Kisfalvi and Oliver (2015) propose that this metaphor is applicable to the creation of a *safe space*. This *safe space* provides frameworks and limits for students that reduce the likelihood of “chaotic disintegration in an emotionally charged but unmanaged situation” (2015, p. 12).

As part of the earlier literature relating to safe spaces, Boostrom (1998) has argued that an over emphasis on the need for safe spaces can run counter to the need for critical engagement. He argued that placing too many limits on challenging and confronting interactions within a learning environment could be counterproductive to academic endeavour to establish tested tenets of knowledge. The question of what students are being protected from is a central question in his argument. The concept of *safe spaces* in the learning environment are seen by Boostrom (1998) to be over protective and undermining of the central aspects of debate and conflict that elicit new knowledge and perspectives. He concludes that “if critical thinking, imagination and individuality are to flourish in classrooms, teachers need to manage conflict, not prohibit it” (1998, p.407). This position assumes that all students are equally confident to put forward their position in situations where challenge and conflict are present.

While there is some truth to the position put forward by Boostrom (1998), the concept of *safe spaces* has continued to develop as a term that denotes the priority on safety demanded by the broader community in learning contexts. Speaking about *learning spaces* in a similar way to *safe spaces*, Kolb and Kolb (2005) argue that they not only encourage their participants to express their differences but also provide safety to psychologically enable those participants to engage with challenging situations. To avoid the possibility of students disengaging or becoming bored within the learning process, there is a need for the provision of opportunities for students to be challenged and to critically reflect (Garraan and Rasmussen, 2014). The two polarities of response to having too much challenge or conflict and not having enough are seen by Garraan and Rasmussen (2014) as counterproductive to the learning process.

While the argument that Boostrom (1998) presents is relevant in the objective driven agendas of academia and to some extent in experiential learning, there needs to be a broader understanding of *safe spaces* as opportunities to free students to express themselves more openly. There is a need to create safe spaces that operate without the threat of censure or

misrepresentation that can occur when participants are prematurely challenged or critiqued without opportunity to fully express their views or insights.

Having reviewed the literature related to the focus on safety, there is clear agreement that participants and teachers/formators need avenues that enable them to freely express themselves without fear of censure and misrepresentation. This raises the issue of the responsibility of the various parties for maintaining a safe space or environment. The next section explores this issue of safety as addressed in the literature related to who is responsible for safety.

2.4.1.2 Responsibility for safety.

The understanding of responsibility for safety is reflected in the way safety is conceived as being applied within the learning community. There is also the issue of who ultimately holds responsibility for the maintenance of safety in an adult learning context.

By applying Winnicott's (1965) concept of *holding environment* to safe spaces in the learning environment, teachers take on a role similar to a therapist (Garra & Rasmussen, 2014). In assuming such a role, teaching staff are understood to be responsible for the care and protection of students as guardians to ensure that they are safe. This understanding of the responsibility of teaching staff, in an adult learning context, raises questions about how responsible they are for the care and protection of students. The parallels with the role of the therapist come with limited expectations in that the therapist assumes the client is vulnerable and needs support and protection. In an adult learning context such as a spiritual direction course, such assumptions may not necessarily apply.

In reacting to the caring and protective model associated with safe spaces, Boostrom (1998) suggests that the responsibility of the teaching staff is to manage conflict and challenges rather than protect students from them. He believes the responsibility of teachers is to act as managers of conflict in the situation which he likens to the "*congress*" or the "*agora*" (1998, p. 407) as places of debate and interchange. The premise of Boostrom's (1998) argument is that *safe spaces* in the learning community are not compatible with conflict and challenge. This assumption reflects a limited understanding of the concept of *safe spaces* particularly in adult learning contexts. The intention of creating *safe spaces* in learning communities is to provide participants with opportunities for critical reflection,

debate and challenge that result from open dialogue free of coercion, domination and censorship.

Another study by Holley & Steiner (2005) found that students in Social Work courses expected teachers to be responsible for the maintenance of safety in the classroom. In conjunction with this finding, the authors note that students have a reduced awareness of their own responsibilities for the creation of safety within the learning environment. Students are able to identify characteristics of teaching staff that they perceived contributed to safety including how they “shared about themselves; were informative or knowledgeable; challenged students; and were laid-back, flexible, or calm” (2005, p. 60). However, there is an absence of recognition of the role that participants as adult students play in contributing to a safe learning community. Instead, by noting what contributes to safe and unsafe learning environments, their focus is clearly on the teaching staff being responsible to determine what is safe and what is not safe. This raises the issue of what is the responsibility of students or participants in contributing to the maintenance of safety in the learning community.

The issue of the shared responsibility of students and teaching staff for creating safe spaces is raised in another study (Kisfalvi & Oliver, 2015). The proposition that Kisfalvi and Oliver (2015) suggest is that respect and trust in each other whether student or teaching staff contributes to the maintenance of a safe learning community. However, the responsibility for developing and generating the respect and trust is still seen to reside with the teaching staff.

This issue of where the responsibility lies for the creation and maintenance of safety is explored in the analysis of findings in this study. This is to ascertain how formators and participants experience and reflect on their various roles in contributing to the safety of the learning community. Various approaches to safety are examined in the following section to distinguish the range of possible approaches and identify their relevance to a spiritual direction program.

2.4.1.3 Approaches to safety.

The approaches to safety identified in current studies tend to revolve around two main themes. These are what Garran & Rasmussen (2014) term the normative and the prescriptive approaches to safety.

The *normative approach* refers to approaches that assume a common understanding of safety often associated with the protective role of the teaching staff. As Garran and

Rasmussen (2014) state, “what often happens is that instructors declare the classroom safe by stating that it is so, without a definition or discussion of what the concept really means” (2014, p. 402-403). The result is that teachers or formators assume responsibility for the learning environment by adopting a protective and/or controlling role. The protective role of the teacher is to provide an environment in which students are not subject to emotional, psychological or physical harm (Holley & Steiner, 2005). This suggests that students are generally free of responsibility for safety in their learning context and this could lead them to become passive participants in the maintenance of safety in the learning community.

To some extent, the protective role of teachers may be assumed, based on the issues of power differentials discussed in the previous section on the role of formators. One understanding of this approach to safety is reflected in Winnicott’s (1960) concept of the *holding environment* which as stated previously refers to the creation of a safe context similar to one generated by a parent in protecting their child. Winnicott (1965) applies this concept to the role of therapists in working with their clients and some have extended the application of the concept to relate to teachers relationships with their students in the learning environment (Garraan & Rasmussen, 2014). In relating the concept to the role of teachers, the assumption is that the teachers are assuming responsibility for the safety of students as a parent does for their children. While this may be appropriate to some degree in light of power relationships, the question remains whether adult students are required to take some responsibility for contributing to the safety of the learning community.

The place of the protective or normative approaches to safety in the learning environment require further examination to determine how the normative approach may work in conjunction with other approaches to enhance the impact of safety for participants in the spiritual direction course.

The *prescriptive approach* to safety is based on the generation and application of ground rules for safe interactions within the learning community (Holley & Steiner, 2005; Palmer 2007; Quiros, Kay & Montijo, 2012). Drawing on the practices within Quaker meetings, Palmer (2007) notes that one of the approaches to safety in these meetings is to establish a culture of “deep confidentiality” (2007, p. 160). *Deep confidentiality* is a term used to describe a set of ground rules that participants in closed dialogue sessions agree to abide by as a condition of being part of the group discussion.

The first aspect of *deep confidentiality*, described by Palmer (2007), involves participants not talking about what has been personally shared by others in the group with people beyond the group. This ensured that participants do not disclose information that could be misread or misrepresented from what is shared in the group. The second level of *deep confidentiality* relates to participants in the group agreeing to avoid raising aspects of the group discussion with other members of the dialogue group outside the immediate group context. This includes speaking with the person who makes a contribution. This condition of deep confidentiality is intended to protect participants from engaging in conversations about the group dialogue outside the confines of the safety of the group context and possibly in earshot of people who have not been part of the group discussion. These ground rules are an example of a prescriptive approach to safety in which the responsibility for safety is shared by all participants who agree to abide by the rules. However, some responsibility for maintaining the safety still rests with the leader or teacher in ensuring participants conform to the agreed rules of engagement.

As Quiros, Kay and Montijo (2012) note, the establishment of the expectations of both teachers and students from the first day is essential in developing an understanding of teacher/ student relationships. The involvement of students in the process of establishing ground rules is proposed by Holley and Steiner (2005) as a significant element in engaging the students in the adoption of the rules for their safety and the safety of their peers. Their discussion of the prescriptive approach to safety highlights the need to be aware of both the relevance of ground rules to particular learning contexts and the role of shared responsibility in developing these rules.

A third form of safety has been identified as the *participatory approach* to safety. The term has evolved within a range of workplace contexts and generally refers to workers adopting safety practices or identifying safety issues within their work contexts (Kongsvik, Haavik & Gjongsund, 2012; Williams Jr, Ochsner, Marshall, Kimmel, & Martino, 2010; Rocha, Mollo & Daniellou, 2015). In these contexts the workers are invited to take on some responsibility for the development and/or maintenance of safety in their working environment. Generally this approach to safety has been associated with workers identifying potential risks within the workplace and reporting them to the appropriate authorities who take responsibility for addressing them.

The factors associated with safety require consideration when processing the findings of this study to determine the role of teachers and participants in the establishment of safety

within learning communities. There is also a need to explore how ground rules impact learning and apply to the various approaches to safety relevant to the formation of spiritual directors. The issues of safety also impact how groups interact in the learning process and this appears particularly significant in a community that has diverse representation. The literature discussed in the following section identifies the issues that arise as a result of having a diverse learning community.

2.4.2 Identity issues in a diverse community.

The wide range of participants in the spiritual direction course raises the issue of the impact of diversity on a learning community. The involvement in the course of participants from different racial or cultural groups, religious affiliations and vocational backgrounds has contributed to a diverse composition within this particular learning community.

The impact of diversity in learning groups has been studied in a range of contexts and focuses on a variety of issues. In national studies of students on campuses throughout the United States, P. Gurin, Dey, Hurtado and Gurin (2002) identify three types of diversity which they subsequently compare in their study of the impact of diversity on academic outcomes. They are: *structural or numerical diversity*; *informal interaction diversity*; and *classroom diversity*. “Structural diversity” (2002, p. 332) refers to the number or concentration of particular racial groups within a specified learning community. The regularity and quality of intergroup exchanges beyond the classroom are described as providing a measure of “informal interaction diversity” (2002, p. 333), and the representation of different groups in the formal learning contexts is used as a measure of “classroom diversity” (2002, p. 333).

Drawing on Piaget’s (1971) *disequilibrium* theory, P.Gurin, Dey, Hurtado and Gurin (2002) note that diversity within learning groups contributes to *discontinuity*. This provides reason for diverse groups to work together. The impact of diversity within groups can intensify participants’ reactions to other perspectives and create tensions within the learning group (Kisfalvi & Oliver, 2015). This can be particularly influenced by differences in expectations or the dominance of a sector of the learning group based on culture or collective identity (Garran & Rasmussen, 2014). Gurin et al. (2002), however, note that *informal interaction diversity* is most influential in producing improved outcomes in relation to cognitive development, academic skills and social outcomes which are seen to strengthen democratic principles. Several years later Hurtado (2005) supported these findings and

further refined them to conclude that it was the quality, intentionality and informality of the interactions that contributes to preparing participants for engagement in a diversely, complex world.

A United States study in team and leadership training also explores the impact of ethnic diversity on the development of work teams (Watson, Johnson & Zgourides, 2002). The results of this study note that initially teams made up of ethnically diverse participants are slower to develop cohesion and produce the desired outcomes in the early stages of working together. However, as time progresses, these teams out-perform the homogenous teams. The authors suggest that the variance in performance between the teams could be accounted for on the basis of “the advantage of having ethnically different views for team problem-solving” (2002, p. 14). This highlights the point that diversity contributes to an enriching of the resource base from which participants can draw in relation to their learning and critical analysis.

Diversity in group dynamics led Menahem (2011) to study the influence of diversity in *bonding* and *bridging social capital*. Menahem describes “bonding social capital” (2011, p. 1103), as homogeneous groups where members of a group construct internal networks that hold the group together often times to the exclusion of others. Alternatively, “bridging social capital” (2011, p. 1104) describes heterogeneous groups where participants within the groups tend to develop links beyond their regular associates. This results in members of these groups being able to facilitate the engagement of a broader range of resources. When applied in a learning context, the study (2011) found that groups with high bridging social capital perform better than those without it in relation to educational outcomes. This suggests that the effect of bridging social capital in a learning context is to create a more significant pool of resources that members can take advantage of in their learning.

With the close association of religion to the practice of spiritual direction, the impact of religious identity on learning is another aspect of the relationship between bridging and bonding social capital. In another United States study, Park and Bowman (2015) use cross-racial interactions (CRI) as the variable for testing the impact of various combinations of religious associations within an academic context. Their findings focus on the effect of religiosity on the engagement with CRI in an academic community. They conclude that students from minority faith groups tend to engage more readily in CRI’s than students associated with the majority Protestant students on campus. This could be explained on the basis of motivation to integrate. However, Park and Bowman (2015) note that religious

identity is a positive contributor to the level of engagement with CRI's compared with those who have a lack of religious identification. Association with campus religious organisations has little effect on the involvement in CRI's and this is independent of the variations in racial identity within the religious affiliations.

These findings raise the question whether the religiosity of participants in the spiritual direction course influences their level of engagement with students of different racial or cultural backgrounds. Other issues which need further considerations include the influence of cooperation and interconnectivity on participants' engagement with each other both in formal and informal contexts.

2.4.3 The impact of cooperation and interconnectivity on learning.

Some of the key aims of higher education have been identified as teaching independent thinking, making sense of experience and building problem solving skills (Castelli, 2011). To promote these outcomes, it has been argued that adult learning operates more effectively as a relational dialogue (Lysaker & Furuness, 2011). This involves students' knowledge and experience being seen as significant in the learning process alongside that of the teacher. The relational dialogue approach contrasts with some traditional approaches to learning that appear to solely focus on the teacher's expertise and authority (Flanagan, 2011). As well as providing a relational context for dialogue, it is essential that a learning community provides space that is considered safe, inclusive and respectful in which adults feel free to share their experiences and knowledge (Castelli, 2011; Giles & Anderson, 2008). Furthermore it is advantageous to create an enjoyable and caring learning community that evokes trust and support among the students (Biggs, 2012).

In a survey of students in theological colleges throughout Australia, students perceived that their learning is enhanced by their informal interactions within and beyond the formal structures of the learning contexts (Ball, 2012). Research into the impact of various dialectics including "apprehension and comprehension; reflection and action; epistemological discourse and ontological recourse; individuality and relationality; status and solidarity" (Baker, Jensen, & Kolb, 2005, p. 411).has also found that the intentional development of informal learning groups within the formal academic programs contributes to deeper learning.

The establishment of effective learning communities in higher education contexts has been found to be influenced by a range of factors including the culture of the institutions in which they are formed (Borredon, Deffayet, Baker, & Kolb, 2011) and diversity and level of

commitment within the group (Wong et al., 2013). In Ball's (2012) Australian study, undergraduate students across a range of Christian higher education contexts described how the lack of recognition of community in the formal learning context led them to informally develop their own points of connection beyond the classroom. The report suggests that this limited the effectiveness of the learning process by not taking advantage of the shared resources inherent within the student community.

Assisting students in dealing with performance anxiety is one of the issues teachers face in promoting learning with students who were experiencing new and different learning contexts (Wirth, 1995). This requires teachers to take responsibility for the development of dedicated and safe group contexts in which students feel able to contribute, share their experiences and insights, and be challenged to move beyond their current levels of apprehension and comprehension (Heron, 1998; Tisdell, 2003). This is about creating collaborative learning communities that provide the context for exchange of insights and the development of relationships between students and the teaching staff (English, Fenwick & Parsons, 2005).

Describing the formal group learning contexts as *communities of practice*, Wenger (1996, 2000) identifies three elements that contribute to competency in these group learning environments. The first element relates to establishing a collective sense of shared accountability within the learning community of students and teachers (Wenger, 2000). While accountability covers a broad spectrum of relational dynamics, he contends that shared understanding of confidentiality relating to what is contributed of a personal nature within learning contexts can be particularly relevant in the spiritual direction formation program.

A second element refers to the way participants in *communities of practice* interact with each other embracing a level of trust and mutuality as partners in the process of learning. The commitment of participants and facilitators to support and have faith in each other to work together is identified as a key factor in how well the groups contribute to learning. As well as having shared relational aspects of mutuality, groups also require a third element of "a *shared repertoire* of communal resources – language, routines, sensibilities, artefacts, tools, stories, styles" (Wenger, 2000, p. 229). These ideals of community are difficult to facilitate within learning contexts where students come from very diverse backgrounds and hold a range of worldviews and associated language differences.

The difficulties in achieving Wenger's (2000) ideals of community relate directly to students in a spiritual direction formation program who come from a diverse range of religious traditions. This contributes to each person having their own terms and stories to describe their worldviews and belief systems. The impact of the involvement in communities of practice and learning within a spiritual direction program requires examination as part of this research project to ascertain how students experienced these group learning contexts.

Communities of learning and practice are contained by boundaries which both define the activities and also create opportunities to learn (Wenger, 2000). The boundaries referred to here are distinct from the relational boundaries mentioned earlier when discussing the relationship between teachers and students. In this context, boundaries are understood to be positional references to social or learning contexts that are defined by their function and activity. In the formal learning context of a spiritual direction formation program, there are several distinct learning and social contexts, including lecture sessions, group practice sessions, peer group supervision, fieldwork practice, and personal supervision.

Beyond the formal learning context there are informal gatherings such as shared social times over meals between formal sessions, interactions within the broader community and involvement with families and friends and colleagues in work situations. As Wenger (2000) observed "at the boundaries, competence and experience tend to diverge: a boundary interaction is usually an experience of being exposed to a foreign competence" (Wenger, 2000, p. 233). How students and teachers respond to crossing these boundaries into broader contexts can contribute significantly to their learning by encouraging them to apply their learning and practice beyond the confines of the structured community of learning and practice.

The role of learning communities in spiritual direction formation programs has been examined to consider the impact these groups may have on students' interaction within a spiritual direction formation program.

2.5 Conclusion

The literature reviewed in this chapter explored aspects of adult learning and examined key perspectives associated with four core categories emerging from the data: the role of different approaches to learning; contemplative models of learning; the role of formators in learning; and how the learning community contributes to learning. The review has raised

several questions related to adult learning in spiritual direction programs. Recent literature has been reviewed to ascertain what is said about the different approaches to learning relating to the subjective and objective aspects and the individual and group configurations of how adults learn. Experiential and contemplative models of learning have been explored and compared particularly relating to the models developed by Kolb (1984), Eriksen (2012), and the *Lectio Divina* approach (Binz, 2008) and *Theory U* model (Scharmer, 2009).

Contextual issues relating to adult learning have been investigated to identify what has been written about the impact they may have on the way adults learn in formal academic and vocational training programs. The role of formators in the learning process has been discussed relating to personal attributes, approaches to teaching, the influence of power and control by formators and the effect of mentoring and modelling on learning. The influence of the learning community has been explored in relation to the development of safety within learning groups, the impact of diversity on learning and the influence of interconnectivity on the learning process. All these aspects of the literature review require consideration when examining the findings in this research.

Having reviewed the literature relevant to this study, the next chapter outlines the various aspects of the research design employed to gather the data, analyze the findings and develop recommendations for application within spiritual direction and other higher education courses.

Chapter 3 Research Design

3.0 Introduction

This chapter provides an overview of the research design which informed this study. The chapter explains the rationale for the chosen approach and how the research was implemented. Strategies for the collection and analysis of the data are also discussed and a justification for the trustworthiness of the project is presented.

Using interviews with graduates and current students in a particular spiritual direction formation program, this research identifies aspects of the approaches to learning and contextual issues that contribute to the participants' effective formation as spiritual directors. The data generated from the interviews have enabled the researcher to construct theories that contribute to understanding the impact of participants' learning processes on their formation as spiritual directors.

The theoretical frameworks and methodological approaches employed to carry out the study were governed by the limited amount of research in this field of study and the nature of the program (Crotty, 1998). There is a significant relationship between the epistemological, theoretical, methodological and research methods underpinning this study. An outline of the research design is presented in Table 3.1 providing an overview of the various elements which are discussed in detail in this chapter.

Table 3.1

Overview of research design elements (Crotty, 1998)

Epistemological Understanding	Theoretical Perspective	Methodology	Method
<p>Constructivism– The understanding that individuals construct meaning in life based on their response to and processing of new experiences whether individually or in groups.</p> <p>Constructionism is premised on the understanding that people develop shared meaning within social contexts</p> <p>Social Constructionism presumes that in reality meaning is the product of group interaction and collective understanding.</p>	<p>Interpretivism – As the input from various individuals and the collective construct data, the meaning does not necessarily come from commonly agreed presuppositions. The data needs to be interpreted through a process that consistently weighs the import of the various elements being considered.</p> <p>Symbolic interactionism suggests that all interaction is built on an agreed set of symbols whether in language, roles or images.</p>	<p>Grounded theory – The collection of data comes from a variety of sources and over time is revisited to enable the theoretical construction of meaning to be reassessed and reformulated in relation to the continual contributions presented by the new data. Constant comparison provides the means to reshape previously held views as to where the research is evolving in terms of theoretical meanings and conclusions.</p>	<p>Unstructured in-depth Interviews – Built on the assumption that the researcher suspends his or her views on the outcome of the research, this approach enables participants to express freely their observations as they relate to the specific research subject and variables. The participants dictate the content offered and the researcher guides the interaction to ensure it remains focused on the research subject and does not deviate into unrelated observations.</p>

The basis of the research design outlined in this chapter is a combination of epistemological understanding, theoretical framework, methodology and methods applied to the collection and analysis of the data. An awareness of these design elements provides the criteria for choosing appropriate processes and techniques with which to approach the collection and analysis of data. The chapter consists of six major sections: epistemological foundations, theoretical frameworks, methodology, approaches to research and trustworthiness of the process.

3.1 Epistemological Foundations

Epistemological assumptions address the nature of the relationship between the knower and the known in the development of meaning (Lincoln & Guba, 1985). These assumptions

relate to the theory of knowledge as expressed in terms of its nature, methodology and philosophy (Gerber & Moyle, 2004).

This research project is focused on a context in which little previous research has been carried out – a spiritual direction formation program. Data are gathered from a diverse range of participants who have been involved in being formed through the program. With no established theories or hypotheses to test and the absence of empirical data to measure, the study is based on an inductive approach to research which starts with the data and develops propositions with a view to constructing concepts and theories (Gerber & Moyle, 2004). The epistemological understandings that the study draws on are constructivism and constructionism. Boynton (2011) proposes that;

Constructivism upholds the belief that human beings interpret and construct meaning and knowledge through interactive internal and external learning experiences that provide explanation and guidance. Constructionism refers to knowledge building within the reality of everyday life constructed and maintained through contextual social interactions and language that are shaped historically and culturally. (2011, p. 115)

In distinguishing between the epistemological terms, constructivism and constructionism, Crotty (1998) points out that “it would be useful, then, to reserve the term constructivism for epistemological considerations focusing exclusively on ‘the meaning-making activity of the individual mind’ and to use constructionism where the focus includes ‘the collective generation [and transmission] of meaning’” (Crotty, 1998, p. 58).

To further distinguish the relationship between these epistemological understandings, terminology adapted from Gunnlaugson (2011) assists in describing the three epistemologically related terms. The constructivist epistemology can be delineated as an *intrapersonal* understanding of meaning construction as it relates to the individual’s processing and creation of meaning within themselves. *Intrapersonal* describes “the dynamic tension between multiple qualities of awareness arising in one’s consciousness” (Gunnlaugson, 2011, p. 16). An *interpersonal* understanding of meaning-making equates to the constructionist understanding of meaning being generated through the interaction of individuals in social contexts. The *interpersonal* aspect relates to “the intersubjective field formed by the engaged subjectivities of two (or more) persons” (Gunnlaugson, 2011, p. 16).

Another perspective on constructionism that is relevant to this study is social constructionism. The social constructionist understanding of the corporate generation of meaning relates to the *transpersonal* dimensions of interactions referring to the “ongoing attention to deeper distributed presence” (Gunnlaugson, 2011, p. 16). The term *distributed presence* relates to that which is beyond the immediate contexts of interaction yet encompasses those involved in the interaction. This refers to any number of broader contexts that influence meaning-making including cultural, religious, philosophical, societal and political environments. The body of literature generated through research represents one such broader context with which the researcher engages to test and develop meaning.

This research project uses individual participant accounts of their experience of the impact of a spiritual direction formation program on their formation as spiritual directors. There was a need to account for constructivist principles in understanding the participants’ *intrapersonal* meaning making processes. Constructionist perspectives were identified in the *interpersonal* interactions between the researcher and participants in the interviews as they endeavoured to clarify the meaning of the personal accounts offered by participants. The *transpersonal* influence of literature and the personal insights of the researcher provided another perspective observed through the social constructionist lens. This perspective enabled the researcher to relate the participants’ accounts of their experiences to broader contexts in clarifying meaning that informed the data generated by participants.

The epistemological perspective of this research focuses on the intersections between the constructivist, constructionist and social constructionist perspectives where the interactions between the participants, the researcher and the literature become the arena in which analysis and new meaning are generated. These epistemologies provide a framework for understanding the way learning and meaning-making occurs through individual, intentional and interactive aspects of processing the data as it emerges in the findings. These perspectives are considered in the following sections to highlight their contribution to understanding the research process.

3.1.1 The constructivist phase.

Constructivism is based on the theory that individuals construct and reshape meaning as they are faced with new experiences (Breckenridge, Jones, Elliott, & Nicol, 2012). This approach recognizes each participant's unique frameworks of meaning-making developed through internal and external experiences to create a sense of understanding and direction in life (Boynton, 2011). In analyzing participants' constructed views of their experience in the formation program, constructivism provides a framework in which the accounts of their experience provide credible and valid expressions of their interpreted and constructed reality (Crotty, 1998). As an epistemological approach, constructivism does not seek to claim landmark discoveries. The research seeks to be realistic in what is concluded in view of the fact that the research project is dealing with real human situations (1998).

The participants construct meaning about the formation program based on their own self-reflection and interactions with others in the program including their formators and supervisors. They are also influenced by the views of others including members of their families and the broader community. Subsequently, the participants construct meaning out of their own reflective processes and personal analysis of what they have experienced. This equates to the constructivist phase of the epistemological understanding of the meaning generation in this context. In this sense the constructivist approach provides the participants' perspectives of the spiritual direction program and as such generates a rich and diverse expression of how learning occurs in the formation process.

The uniqueness of each individual's experience and subsequent understanding of that experience is respected and considered as valid as any other participants' interpretation or understanding of it (Crotty, 1998). This requires the researcher to become aware of his own meaning frameworks and assumptions in approaching the process of collecting, collating and interpreting the data provided by the participants (Glaser, 2012). The result is the limiting of what the researcher can claim as findings from the data, recognizing that he is only able to claim to have arrived at one interpretation among many. Caution is exercised using this approach in data collection so that neither the participants' nor researcher's perspectives unduly distort the concepts being constructed from them (Breckenridge, Jones, Elliott, & Nicol, 2012; Glaser, 2012).

While meaning generation emerged from interactions with others, the participants' formulation of meaning relates to their self-analysis of their worldviews and perceptions of

what they experienced (Joldersma, 2011). The dialogue between the researcher and participants, in the course of gathering data, extends the process of meaning making as the participants give expression to the meaning that they have formed in relation to the experience. The interaction between the participants and the researcher marked the crossover into the constructionist phase of the epistemological process while still acknowledging the constructivist phase. This is represented by the two way arrows located between the constructivist and constructionist dialogue boxes in Figure 3.1. The next section of the epistemological perspectives explains the constructionist phase of the research project.

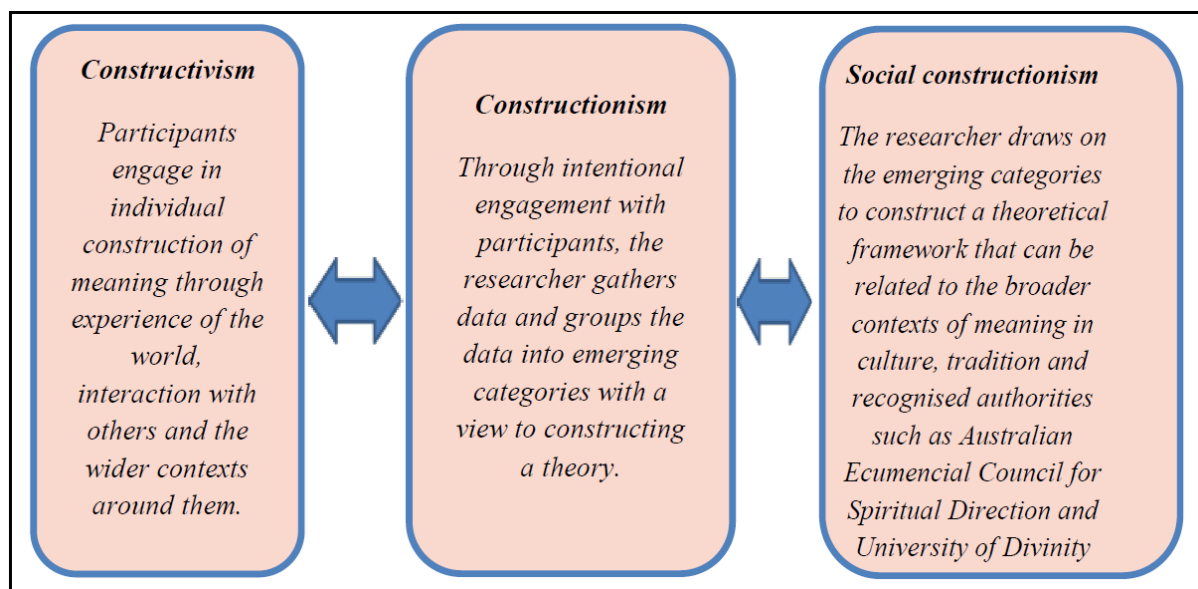


Figure 3.1. Outline of the epistemological processes of this research.

3.1.2 The constructionist phase.

Constructionism takes into account the social dimension of the individual participant's interactions with each other in relation to meaning construction (Crotty, 1998). While acknowledging the importance of the individual in constructing meaning, advocates of constructionism propose that the intentional engagement between individuals, whether one-on-one or in group contexts, facilitates the process of categorizing meaning through interaction between individual participants (1998).

Taking a constructionist approach to meaning-making, the researcher interacted with the participants to identify shared aspects of meaning which the researcher grouped into emerging categories with a view to analyzing the data. During this phase of the meaning construction process, the researcher gathered sections of the categories under codes (Holton,

2010). The process of choosing codes provides a framework that enables the researcher to more readily identify the key elements of emerging categories. This means that the researcher's voice is engaged along with the participants' voice in the creation of meaning through the identification of codes and emerging categories (Glaser, 1998). The categorizing of the data brings together common themes from the various accounts of participants that emerged from the data during the process of interaction with the researcher. The categories are chosen to encapsulate the essence of shared meanings gleaned as a product of the interaction between the researcher and the participants.

Being open to the possibility of new meaning ensured that consideration is given to minimizing the researcher's influence in interpreting the participant's input during the analysis and categorization of the data (Deady, 2011). This awareness affirms the constructivist perspective that honors the validity of the individual participant's contribution to the primary empirical data resource while preparing for the constructionist phase of meaning emerging out of the interaction between participant and researcher. The constructionist phase includes the researcher's use of open questions to elicit clarification and amplification of the meaning that participants have constructed in the constructivist phase.

The interaction between the researcher and participants fulfils the constructionist agenda of collaborating in the process of identifying shared meaning relating to the participants' experience of the formation program. The categories identified by the researcher provides the framework for the construction of a theory grounded in the shared meaning emerging from the data. These categories and initial theories became the basis for the next phase of the epistemological process, the social constructionist phase.

3.1.3 The social constructionist phase.

Developed in association with social work research, social constructionism challenges the correspondence theory that reality can be reduced to concepts that reliably match up with the reality they describe (Anastas, 2012). The former epistemological perspective proposes that the perceived understanding of things differ according to cultural, historical and linguistic influences and factors. The argument for this approach to processing meaning is that the positivist contentions of science are not completely removed from political, social or value generated influences within the wider context of society (Witkin, 1999).

Building on constructionism, social constructionism points to the broader influences involved in constructing meaning (Gergen & Thatchenkery, 2004). The broader setting of the

cultural and societal influences in formulating meaning is significant in the context of the instance described here (Crotty, 1998). Meaning is constructed around shared understandings expressed in symbolic form that provide a common framework in which social interaction can occur. The social constructionist approach to research acknowledges the role culture plays in the collective generation of meaning within particular contexts and timeframes (Lock & Strong, 2010). Foundational to social constructionism is the notion that through social interactions, concepts or knowledge are constructed not discovered (Andrews, 2012).

In this phase, the researcher gathered the emerging categories and initial theories before examining how they related to each other and the broader body of research and literature. The researcher identified key links between the categories which, when integrated, generate a new theory that could contribute to the understanding of the impact of the formation program on students in the spiritual direction course being explored. The generated theory could be applicable to the other spiritual direction formation programs as well as academic and vocational programs (Bentley & Buchanan, 2013).

Meaning making is not linear in progression. The meaning-making process continues to evolve through cyclic patterns of checking and cross checking of meaning construction between various contributors in the epistemological process (Hernandez, 2009). In the crossover between the constructionist and the social constructionist phase, the researcher continued to test the emerging categories and initial theories through reviewing literature and research carried out in related fields of study (Christiansen, 2011). The two way arrow between the constructivism, constructionism and social constructionism dialogue boxes in Figure 3.1 indicates the crossover between the theoretical perspectives applied within this study. The interplay between these epistemological perspectives is explored in the next section.

3.1.4 The epistemological approach for this research.

Constructivism and constructionism come from two different fields, namely the psychological and sociological fields respectively (Young & Collin, 2004). This research project has focused on the intersection of the individual participant's psychological process of meaning making, the social interactions with peers and teaching staff and the broader social context of the community of researchers. The researcher identifies the impact of the learning processes as the key focus of the research project. Strictly speaking, the epistemology related to understanding the impact of the various intersections, is situated

between elements associated with constructivist, constructionist and social constructionist perspectives and so does not fit neatly into any one epistemological view.

In describing classic grounded theory methodology, Breckenridge, Jones, Elliott and Nicol (2012) contend that several epistemological approaches are not excluded from being applied in this method of research. However they qualified this by claiming that “through constant comparison, the latent behaviour is conceptualized, saturating concepts and transcending the descriptive level of multiple perspectives to account for as much variation in the data as possible” (2012, p. 66).

In this research, it is acknowledged that constructivist principles come into play when considering the individual participants meaning construction. However, constructionist and social constructionist frameworks are also relevant in guiding the consideration of the formation programme’s social processes and broader traditional and institutional factors that contribute to meaning making in the collective context. This leads into the theoretical frameworks that clarify how the data generated through the epistemological perspectives are processed.

3.2 Theoretical Frameworks

This section of the research design outlines the theoretical framework that underpins the research project. Having chosen a combination of constructivism, constructionism and social constructionism as the preferred epistemological approaches, the choice of theoretical perspectives based on interpretivism points to the need for understanding rather than explaining participants’ responses to the formation program.

The ontological presuppositions of constructivism provides the foundations on which interpretivism can develop an understanding of the phenomenon of the formation program through the lived experience of the participants (Goldkuhl, 2012; Weber, 2004). With the focus on understanding the participants’ responses, interpretivism provides the best fit to process the data as this approach is based on seeking to understand the information generated in the data. The interpretivist perspective considers the objects of research in light of the interpreted understanding based on the participants’ and/or the researcher’s lived experience.

One of the natural partners to interpretivism as a theoretical perspective has been symbolic interactionism which grew out of pragmatism and interpretivism through the work of Mead (1934) and later identified as such by Blumer (1969). In symbolic interactionism,

the presumption is that people interact with things based on the meaning they bring to them. This meaning emerges from the social interactions with peers and others (Goldkuhl, 2012). There is also an assumption that people engage in interpreting their experiences through the circumstances and situations they are dealing with in their broader lived experience (2012). These theoretical perspectives of interpretivism and symbolic interactionism are explored and their relevance to the research design examined in the following sections.

3.2.1 Interpretivism.

The interpretivist perspective distinguishes between subjective understanding and causal explanation (Goldkuhl & Stefan, 2010). Interpretive perspectives support the view that participants can describe in their own terms the insights and experiences that relate to their social context (Orlikowski & Baroudi, 1991). This perspective also fits the underlying principles of grounded theory methodology as proposed by Glaser and Strauss (1967) which is the methodology chosen for this research project. (This methodology will be discussed further in the methodology section).

The interpretivist perspective is based on the proposition that a phenomenon is made up of many realities. This view asserts that individuals and groups are continually restructuring their understanding of a phenomenon based on culturally constructed and time bound interpretations of a social context (Crotty, 1998). Interpretive research is aimed at understanding how participants in social settings engage in social processing within particular situations to create meaning and apply these meanings to support their responses within their social contexts (Minichiello, Aroni & Hays, 2008). Orlikowski and Baroudi (1991) propose that “interpretive studies assume that people create and associate their own subjective and intersubjective meanings as they interact with the world around them. Interpretive researchers thus attempt to understand phenomena through accessing the meanings that participants assign to them” (1991, p. 5).

The social context of the formation program had no established preconceived axioms or concepts which could be tested and therefore interpretation of the data is required (Leitch, Hill, & Harrison, 2010). The researcher gathered data, by interview, from the participants’ perspective with a view to understanding their view of the formation program (Andrews, 2012). The focus of interpretivism in this research study is then to make sense of the social context and not to explain it in terms of universal laws or principles (Crotty, 1998).

Interpretivism recognizes the complexity of social interactions which means that assumed generalizations are limited. Therefore meaning and theory development is understood to relate to the particular contexts and elements of these research subjects (Biedenbach & Müller, 2011). The theory developed from the research, when understood through the interpretivist perspective, is seen to have limited application as a general theory. According to Goldkuhl (2012) “the core idea of interpretivism is to work with these subjective meanings already there in the social world; to reconstruct them, to understand them, to avoid distorting them, to use them as building-blocks in theorizing” (2012, p. 138). Interpretivism provides a perspective for understanding the formation program as seen through the participants’ interpretation of their experiences. The interpretive research process in this qualitative research requires that the focus of enquiry is on the whole context of the subject area rather than focusing on its different parts. This is in contrast to a positivist approach which generally works with predetermined sets of variables (Goldkuhl, 2012).

There are three recognized approaches to interpretivism: (i) hermeneutics, where the focus of interpretation of a phenomenon is through the lens of the person who experienced it, (ii) phenomenology, which is based on the researcher taking into account the essential relationship between the person and phenomenon being interpreted and (iii) symbolic interactionism, which proposes that meaning is derived from social interactions that influence the interpretive process when encountering a phenomenon (Creswell, 2009; Minichiello, Aroni & Hays, 2008). The justification for the choice of symbolic interactionism as the interpretive approach is explored in the following section.

3.2.2 Symbolic interactionism.

Symbolic interactionism is engaged to assist in understanding how the data generated by participants can form the basis of a theory that could be applied in broader contexts (Crotty, 1998). Symbolic interactionism has been credited with laying the foundations on which grounded theory developed and so is a natural partner to the methodology applied in this research (Aldiabat & Navenec, 2011). One of the founding practitioners of grounded theory, Strauss (1987), having trained with Blumer (1969) in the University of Chicago, contributed to instilling symbolic interactionism principles into the grounded theory practice (Charmaz, 2000). The theoretical framework developed in this research draws on both interpretivism and symbolic interactionism to process the data generated in the application of grounded theory (Aldiabat & Navenec, 2011).

Symbolic interactionism focuses attention on the processes of interaction within and between human beings that contribute to meaning development. The development of meaning particularly begins with the individual acting in a particular situation rather than considering the system as a whole (Bowers, 1989). The assumption is that people exist in a world of symbolically constructed meanings and they respond to situations based on their interpretations of these meanings (Forte, 2009). This assumption is based on the understanding that participants in a particular context, group or cultural setting interpret their actions or interactions with others from a position of approximate consensus built on their shared understanding of an action, role, statement or event (Forte, 2010). Central to this approach is the notion that the researcher needs to see things from the participant's perspective (Crotty, 1998).

In this research project, the researcher interacted with the participants using symbolic elements such as language, roles and cultural frameworks, to establish shared perspectives from which the researcher could identify the participant's interpretation of the research subject (Oliver, 2012).

Symbolic interactionism also relates to the process of introspection that happens within a person when identifying with oneself, whether researcher or participant. The self-concept designated as "I" is identified with the active, reflective and reflexive aspect of self and has been distinguished from the passive part of self which is the object of self-reflection and identified as "me" (Aldiabat & Navenec, 2011).

Looking through the lens of symbolic interactionism, the passive "me" engages in interpreting a situation and determining what role the "me" will take on, rather than assuming a predetermined role. In this research project, the "me" of a participant might have taken on a range of roles including that of spiritual director, participant in the spiritual direction formation program or observer of the formation program. Similarly, the "me" of the researcher also could have identified with multiple roles such as researcher, formator, past student or colleague. To engage with the symbolic interactionist approach requires the researcher to firstly pay attention to the role the participants are speaking from, as well as reflexively noting his own role before looking at the social situation on which they are both reflecting (Bowers, 1989). The individual participant's point of view becomes the starting point from which analysis develops. From this perspective the researcher examines the shared perspectives of a group of participants which, in time, is related to the larger social context of the formation program.

The assumptions of symbolic interactionism fit neatly with the methodological approaches of grounded theory which shares many of the propositions on which interpretivism and symbolic interactionism have been built (Aldiabat and Navenec, 2011). Having considered the theoretical perspectives, the methodology adopted for this project is outlined in the following section.

3.3 Methodology

The methodology chosen to process the data from participants in the formation program is grounded theory. Flowing out of the interpretive, symbolic interactionist approach, the study drew on principles of grounded theory originally conceived by Glaser and Strauss (1967). The strengths of grounded theory include a systematic approach to analysis, an inductive focus on theory development from the data, continual analysis based on constant comparison of the emerging data and what Charmaz (2000) referred to as the “self-correcting nature of the data collection process” (p. 522).

The original grounded theory methodology has come to be known as classic grounded theory (Glaser, 2012; Aldiabat and Navenec, 2011; Roderick, 2009). Since the original conception of classic grounded theory, other approaches to grounded theory have emerged that apply its principles based on different epistemological and theoretical perspectives.

Having been involved with the original design of the method, Strauss worked with Corbin (1990) to develop a new approach that is based on a more structured and systematic approach to data gathering. This involves the pre-selection of categories to assist in guiding the data collection process. Emphasis is placed on the word by word analysis of the data by researchers as they develop theories based on their interpretation of the data. The approach came to be referred to as a “form of qualitative data analysis” (Engward, 2013, p. 39). Strauss and Corbin’s (1990) methodology is an approach that fits well with research that is carried out in contexts where previous studies have developed some categories that needed further analysis and testing (Glaser, 2012).

Another development of grounded theory focuses predominantly on the constructivist epistemology and is known as *constructivist grounded theory* (Charmaz, 2000). This is in reaction to what Charmaz (2000) described as the objectivist approaches of Glaser, Strauss and Corbin. The constructivist approach to grounded theory is premised on giving priority to participants’ firsthand accounts of the situation under research. Charmaz (2000) argues that

the researcher is required to immerse him/herself in the world of the participants to faithfully interpret and analyse the data they offer. This approach fits well with research in which the participants were closely associated with, or were the subject of the research.

This research project, however, is focussed on the various approaches to learning and the influence of contextual factors on participants' learning. The principles of classic grounded theory provide the most effective methodology to guide the gathering and processing of data in this research project.

3.3.1 Classic grounded theory (CGT) approach.

Following the principles of classic grounded theory, data is collected and analyzed in a continuous process with a view to identifying categories and coding them to enable core categories to be generated. In promoting the open agenda approach to grounded theory, Glaser (1998) contends that by eliminating possible preconceptions, the researcher reduced the tendency to *force* the data. This includes the avoidance of substantial reviews of literature prior to data collection so as not to be influenced by others' theories or conceptualization. Instead, Glaser (1998) proposes that data collection proceed without predetermined problems or problem-oriented research questions so as not to limit the scope of categories that could emerge from the data.

This researcher limited his influence on the data by collecting detailed accounts of the participants' perspectives, taking extensive field notes and audio recording the interviews. Although this is not a requirement of CGT and Glaser (1998) actively discourages it, the audio recording provided a range of opportunities to reduce the influence of the researcher on the collection and analysis of the data. Glaser (1998) recommends not using the recording of interviews to avoid becoming overwhelmed by the detail produced by being able to return to the actual script of the interviews. He suggests that having data that is too dense could distract from broader emerging themes in the data. However, this researcher recorded the interviews to provide another level of accountability and trustworthiness in the collection and processing of data. The principles of CGT were applied by the researcher focusing on broad themes as they emerged in the interviews and utilizing and tracking these as further interviews addressed these themes.

In the process of recording, the researcher is firstly able to check that what was said by the participants related to what he thought he has heard. Having listened to participants' responses firstly in the interview, the process of transcribing the interviews into a textual

form enables the researcher to hear responses again as he listens to the recording. The researcher reads the transcripts to identify further categories and sub categories and compares them with categories from previous interviews using a constant comparison approach to data (Hallberg, 2006). These stages of hearing the interviews, listening to the recordings, transcribing them and reading the text of the transcripts provides ample opportunity for the researcher to ensure that he has “heard” what was actually said by the participants. This contributes to minimizing bias and maximizing accuracy of the data collected. Glaser (2012) argues that such an approach tends to contribute to a very dense set of data. However, this researcher found that the process assists in clarifying participants’ interpretation and application of their insights about the learning processes they have experienced in the formation program.

In adopting the principles of classic grounded theory, the researcher also embarked on the data collection without a predetermined set of categories to address. Applying these principles of classic grounded theory (CGT), the researcher avoids forcing the data collection and analysis to the detriment of the credibility of the research outcomes. The following sections explore: the emergence of categories in CGT, the role of literature reviews in CGT, and the appropriateness of CGT in this study

3.3.1.1 The emergence of categories in CGT.

The process of identifying categories and sub-categories within the data is based on an extensive process of continual reflective and reflexive examination of the data as it emerges in the interviews. Constant comparison of data provides the means to reshape previously held views and identify newly emerging categories (Boeiji, 2002; Glaser, 2008).

Contrary to Corbin and Strauss’ (1990) methodology, the researcher initially avoided predetermining what topics or categories would be addressed in the data collection process. By constantly comparing the particular themes and perceptions that were emerging in the interviews, the researcher commenced the process of identifying the categories that represented the perceptions of the participants in the program (Hallberg, 2006). Only as categories emerged within the data did the researcher introduce them into subsequent unstructured interviews when they related directly to data that was being offered. This has been described as substantial and open coding approaches within grounded theory (Scott, 2009).

Having identified “core variables” (Glaser, 1992, p. 75) from the data, categories were grouped into related aspects of the phenomena being researched and selective coding was engaged to identify core categories that were emerging from the data (Holton, 2010). As these core categories emerged, the researcher continued to compare them with what was emerging from the new data generated as the interviews progressed. This was to test for saturation of the data which involved investigating whether there were any new or further aspects of a category that required exploration (Andrews, 2012).

When the core categories were initially finalized through saturation of data, the researcher proceeded to engage with the literature review in line with classic grounded theory principles.

3.3.1.2 The role of literature reviews in CGT.

After data collection and the establishment of core categories, the literature was reviewed to provide references to situate the findings of the research within the broader context of related research. In the writing up phase of the research, the literature review was utilized to compare and contrast other relevant research material with the core categories (Glaser, 1998). It has been argued that in CGT, substantial literature reviews should not be engaged with prior to the data collection (Scott, 2009). By engaging with significant prior reading of literature, the collection and analysis of the data may be adversely influenced (Glaser, 1998). In this study, the literature relating to the core categories contributed to the development of theories and implications through the ongoing process of comparison with the original data (Christiansen, 2011). Based on the findings and subsequent substantial literature review, analysis of the findings commenced with a view to the development of theories informed by the data and related areas of research. Engagement with the literature also contributed to refining the categories at the final stages of conceptualization as part of the process of locating the findings within the broader body of research. This enabled the researcher to examine the data with a more precise lens to understand new perspectives of what the data were indicating in relation to the participants’ understanding of what they were experiencing.

The role of the literature review in the CGT approach provided a further avenue of confirmability and credibility to the analysis of the data and the identification of categories as discussed in the following section.

3.3.1.3 The appropriateness of CGT for this study.

As noted in the introduction to the methods section, there are three main recognized approaches to grounded theory; the classic approach (Glaser & Strauss, 1967), the systematic approach (Strauss & Corbin, 1990) and the constructivist approach (Charmaz, 2000). The later approaches have not superseded earlier ones. Each method has contributed significant insights into the ways in which grounded theory can be adapted to a range of contexts and approaches to research.

In this research, however, the principles of the original or CGT were appropriate to guide the collection and analysis of the data relating to the curriculum regarding the formation program and its impact on the formation of spiritual directors. This choice was based on the understanding that there were no pre-existing studies in the area of spiritual direction formation that provided knowledge from which categories could be drawn to guide the research (Mikecz, 2012). Therefore it was necessary to apply a method that allowed categories to emerge from the data rather than being predetermined as suggested in the more systematic approach proposed by Strauss and Corbin (1990) (Engward, 2013). The fact that the participants in the research were not being surveyed for their views on how the program could be designed meant that the constructivist approach to grounded theory (Charmaz, 2000) was not a suitable approach. The principles of *CGT* were therefore adopted to determine what factors supported the improvement and further development of the formation program in promoting learning.

The study examined a phenomenon for which there was little or no formal research relating to the categories that explained how the formation of spiritual directors occurred. The CGT approach (Glaser, 1992, 1998) was deemed necessary to enable unbiased and open approaches to guide the identification of categories related to spiritual direction formation. This provided a methodology that engaged the inductive processing of participants' insights which provided the data that enabled categories to be proposed. This inductive approach started with the data generated and worked toward the identification of categories. This contrasted with deductive approaches that started with hypotheses and sought to establish their viability through the examination of data (Minichiello, Sullivan, Greenwood, & Axford, 2004). The classic grounded theory approach also allowed for those categories to be tested through constant comparison with data that was emerging in subsequent interviews (Glaser, 2008). The process of constant comparison enabled the researcher to continually reexamine

the categories against the data which provided a level of accountability that supported the credibility of the study (Denzin, 2010).

Having identified the methodology applied to the research, the specific methods adopted to implement the methodology are examined to outline the procedures employed to consistently and systematically apply the methodology of CGT within this research study.

3.3.2 Method.

The methods of collecting data as part of the CGT approach to qualitative research have generally been through personal interviews where the process of constant comparison and data saturation can more readily be applied (O'Reilly, 2012).

The personal interview is understood to be a conversation between two parties to enable the interchange of information in relation to a specific theme or outcome (Green & Thorogood, 2004). Several forms of interview have been identified according to the manner in which they are approached. The three main approaches are structured interviews, semi-structured interviews and unstructured interviews (Minichiello, Aroni & Hays, 2008; Qu & Dumay, 2011).

The *structured interview* takes a more targeted approach to the interview process using pre-determined questions to elicit particular data from participants (Fontana & Frey, 2000). The *focused or semi-structured* approach tends to be based on a clear protocol that determines where the questions are targeted but leaves room for other aspects of the discussion to be explored beyond the immediate scope of the question (Qu & Dumay, 2011). *Unstructured interviews* are generally aimed at exploring a phenomenon without preconceived agendas in relation to what categories of data are being sought (Fontana & Frey, 2000; Qu & Dumay 2011). While the latter approach has been usually referred to as unstructured, Minichiello, Aroni & Hays (2008) propose that it would be more accurate to describe it as “loosely structured” as “there is both implicit and explicit structuring of the conversation” (2008, p. 53). Acknowledging this distinction in definition, this researcher refers to the approach by the commonly accepted term within grounded theory of *unstructured interview*. This also reflects the determination of the researcher to avoid where possible any structuring of the interviews that may adversely influence the participants in sharing what they wish to convey about the formation program.

This researcher used unstructured in-depth interviews with participants in the research to invite them to respond to the subject of research in a way that minimized the influence of

the researcher to shape the data to achieve the researcher's desired agenda (Mikecz, 2012; Simmons, 2010). This approach was applied to enable participants to express freely their observations as they related to the research variables. The researcher guided the process to ensure the interviews encouraged participants to express in some depth their perceptions of the learning processes in the course. The intent of the researcher was to provide in-depth, focused, reliable and unbiased data from which to identify categories relevant to the area of research (Qu & Dumay, 2011). In creating a dense and detailed set of data, the researcher was faced with the challenge of creating codes and categories that reflected the themes emerging from the interviews (Cresswell, 2009).

Glaser (2009) recommends that researchers avoid immersing themselves too much in the detail of the data emerging from the interviews. He contends that this tends to lead to premature saturation of categories and distracts researchers from paying attention to the deeper aspects emerging in the data. With this in mind, the researcher in this study endeavoured to resist initially focusing too narrowly on specific detail with a view to noticing the themes that were emerging within the interviews.

With no previous research to test or draw on, the in-depth nature of the interviews provided scope for the participants to present a broad set of data that they identified as significant (Fontana & Frey, 2000). The in-depth nature of the interviews also required the researcher to do more than just ask the right questions but also to listen more deeply and reflexively to notice the subtlety of what was being shared beyond the commentary (Hydén, 2014). With time to explore themes and categories more extensively, the interviewer engaged in the initial constructivist agenda of identifying the participants' meaning and sought to distinguish it from the researcher's own understanding of what was being said. This involved the researcher clarifying the meaning by use of follow up questions. The clarifying questions also provided the researcher with opportunity to engage in the constructionist phase of analysis by endeavouring to establish a shared understanding of what the interviewee intended to convey.

The following section outlines the details of the approach taken to implement this method within the context of this research study and what implications this had for the manner in which each element was chosen.

3.4 Approaches to Research

In exploring the various elements of the research, this section looks at: the participants, the actual interview, and the researcher's background. Most of the interviews were conducted at the Centre where the formation program operated or in locations nominated by participants. The choice of location provided a safe, neutral place which was familiar to the participants (Barker, 1965). In line with the symbolic interactionist perspective, the most salient "me" of the participants in the research project was the role of student in the formation program. With this in mind, the researcher endeavoured to interview the participants in a location where the formation program was conducted. This approach was taken to help reinforce the connection between the research and the learning processes of the formation program.

3.4.1 The participants.

This study explores the relevance of the learning processes and contexts for current students and recent graduates in their formation as spiritual directors. "Recent graduates" are those who have participated in and graduated from the formation program in the previous six years to when the interviews were conducted. There were about 35 recent graduates and current students, excluding first year students, eligible to participate in the research project. There were 25 positive responses to the invitation to participate in the research (19 graduates and 6 final year students).

Allowing the order of response to determine the interview sequence contributed to minimizing the influence of the researcher in assuming the relevance of a particular group or demographic in relation to the research project (Breckenridge & Jones, 2009). The total number of participants interviewed was 21 which was determined by the point at which theoretical saturation was achieved (Glaser, 2012).

In the next section, two elements of the procedure for approaching participants is discussed. These elements included: seeking permission to interview the participants, and inviting the participants to be involved in unstructured in-depth interviews.

3.4.1.1 Seeking permission to interview the participants.

The project focused on a curriculum program for the formation of spiritual directors. A letter was written to the management of the Centre where the formation program is

conducted, in line with the protocols and guidelines for ethical research as proposed by the Australian Catholic University. Permission was sought to engage in research relating to the formation program that operates under the auspice of the Centre (See appendix A). This was addressed to the chair of the Centre board and the director of the Centre. The letter outlined the scope and possible impact of the project on the Centre and the participants. A brief outline of possible benefits to the Centre and the formation program were also included.

3.4.1.2 Inviting participants to involved in an unstructured in-depth interview.

A written consent form was circulated to potential participants in the research project outlining what was involved and how confidentiality would be maintained (See appendix B). The identity and the role of the researcher in the interviews were made clear. A brief description of the research project was included along with its intended contribution to the field of research. Participants were required to sign consent forms before participating and having their contributions used as data within this research project (See appendix C).

3.4.2 The actual interview.

In preparation for the unstructured interviews, participants were reminded of the instructions in the letter at the commencement of the interviews to ensure that they understood the unstructured approach and were comfortable with proceeding. To assist in guiding the interview, the researcher used an interview protocol (See appendix D) to ensure the consistent and effective application of the interviews for data collection (Cresswell, 2009).

The protocol assisted in standardizing the approach across all interviews. An initial statement about the process and intent of the interview was read at the beginning of each interview to ensure the same information was conveyed to each interviewee (See Appendix F) (Kvale, 1996). A list of open-ended questions was formulated for the sole benefit of the researcher to provide prompts if the interview moved away from the core focus of the research being addressed or a category became saturated. This consisted of a checklist of topics or questions that related to the key elements of the formation program that were central to the research subject (Qu & Dumay, 2011).

A concluding statement was also read at the end of each interview to make clear how the information shared in the interview would be processed and secured. A final statement of appreciation was offered to the interviewees to thank them for their time and contributions to

the research project. The protocol was intended as a guide for the researcher to provide a consistent approach to interviewing and as a framework for developing clear and congruent field notes (Cresswell, 2009).

Following the initial protocol statement at the commencement of the interview, the researcher invited participants to list four or five aspects of the spiritual direction formation program that impacted upon them most in their formation as spiritual directors. They were asked to initially list these aspects and without expanding on them. This was to initiate the process and ensure that the participants set the agenda of topics that they wanted to discuss. The researcher entered the process conscious of avoiding predetermined agendas so as to promote as great a sense of theoretical sensitivity as possible (O'Reilly, Paper & Marx, 2012). Theoretical sensitivity relates to the researcher's ability to distinguish which elements of data promote meaning within the research project without being influenced by pre-existing hypotheses or ideas (Glaser, 1978).

When the participants had finished listing these initial aspects, the researcher invited them to elaborate on each one in the order in which they were offered. The researcher continued to encourage the participants to disclose what it was about that aspect that influenced them in their formation. If the researcher ascertained that the participant was not addressing data relevant to the research focus, he would prompt participants to return to the intended focus of the research using open-ended questions from the interview protocol (See Appendix G).

Once the participant had nothing more to contribute in relation to a particular aspect, the researcher invited the participant to consider the next aspect on the list they had provided. This process was followed for each aspect offered by the participants until all aspects on their lists were addressed. The researcher then enquired if there were any other elements of the formation program that the participant wanted to add to the list they had initially provided. This was to determine whether the participants had anything further to add to their previously stated observations and contributions. They also may have wanted to expand on their original list or add something new that had occurred to them during the interview. The researcher then returned to any aspects of the conversation that related specifically to emerging categories from previous interviews.

Questions applied throughout the interview were invitational and open-ended to minimize researcher influence on the data generated in the interviews. At the conclusion of

the interview, the researcher read the final protocol statement and thanked the participants for their willingness to be involved in the research project and in offering their insights about the formation program (See Appendix H).

Having interviewed the participants, the researcher listened to the recorded interviews and transcribed them before checking the field notes taken during the interview. He then proceeded to process the data from the unstructured interviews through a systematic cross-checking of the interview scripts with a view to identifying any emerging or repeated themes or categories. Once all crosschecking was completed, all data was placed in a secure location.

3.4.2.1 Cross-checking the data from the unstructured interviews.

The researcher digitally audio recorded the interviews. While digital audio recording interviews has not been a traditionally accepted practice in the classic grounded theory (Glaser, 1998), this approach was taken to provide accurate records of the interview which could contribute to reducing researcher bias in the processing of the data. The recordings also provided an avenue for the researcher to revisit the data at a later stage if further analysis was required. This also ensured that the views of the participants were accurately conveyed.

Field notes were also taken during and immediately following interviews to register key elements, codes and categories as they emerged. These notes also provided an account of non-verbal input and the researcher's own observations for later reference. This also provided the researcher with an opportunity to constantly compare between the detailed scripts and field notes or memos that were recorded during the interviews to identify any categories or connections that could be attended to in following interviews (Holton, 2010). The researcher also used the field notes to keep a track of the lists of observations that interviewees initially provided at the commencement of the interviews so that they did not miss any in the process of reviewing each aspect.

3.4.2.2 Combining the data.

The codes that arose from the data were then colour-coded to distinguish them into common groupings as part of the process of identifying emerging core categories within the scripts. Having colour-coded the data, the researcher identified the sections of the interview transcripts related to each code and transferred them to a table that listed the theme of the section, the coded identity of the participant who contributed that section of interview and the

particular transcript of the section (See Appendix I for sample of tables). Separate tables were developed for each core category.

When the sections of the transcripts were tabled according to core categories, the researcher then examined each core category to determine what sub categories emerged. These subcategories were noted against each section of the interviews recorded in the table of categories. This enabled the researcher to quickly identify and collate sections of the transcripts of the interviews that related to the sub-categories and review them as part of establishing the findings of the research.

The steps outlined above provided a spontaneous overview of what participants perceived as significant to them. By asking the participants at the beginning of the interview to list the aspects that were significant to them in their formation, participants were able to identify the aspects without the influence or prompting of the researcher. In accordance with classic grounded theory principles (Glaser, 1992, 1998), the agenda of the interviews was set by the participants in response to the aspects they had listed rather than based on elements or aspects dictated by the researcher. In the interviews, participants were invited to explain the significance of the aspects they had identified to their formation as spiritual directors. As well as allowing the participant to choose aspects to be considered, the interviews were aimed at identifying how these aspects impacted participants.

To confirm the identity of the categories that emerged, the researcher drew on the aspects that were initially identified by participants to identify possible codes that would inform the determination of core categories. These initial insights provided a summary of feedback at the conclusion of theoretical sampling and category development. The researcher returned to these summaries for further confirmation of category choices. The aspects that each participant initially identified as significant were listed in a combined table. The researcher related these aspects with the categories and sub-categories chosen. In matching all categories and sub-categories to the initial lists of all participants, the level of saturation of each category and sub-category could be compared with what participants had identified as core elements influencing their learning (See appendix E). This provided an avenue of cross checking or triangulation in that it also highlighted the spread of categories across the participants' responses. In classic grounded theory, however, the emphasis is not on the number of times a category is identified across interviews but whether the category fits or is relevant to an emerging theory (Holton, 2009). With this in mind, the comparison between the initial responses and the emerging categories provided an indication of the level of

congruence between the researcher's understanding of the data and the participants' meaning. This indicated a shift into a more constructionist phase in the analysis of data.

In the constructionist phase of analysis, the researcher continued to work with the core categories as he understood them and checked them back against the original data to ensure that his perception of the categories was congruent with the broadly expressed themes within the data. He also referred to literature that related to the concepts embedded in the categories to assess whether previous research existed that may confirm or challenge the theory emerging from the core categories (Holton 2010). This process continued as the core categories and their related sub-categories were revisited and modified as part of the researcher's ongoing engagement with the emerging theory. Some categories were eliminated and others combined to reflect the ongoing theoretical sampling and saturation of the data as the researcher sought to refine the emerging theory (Glaser, 2012). When the theory emerged, the core categories were assessed to see whether they related and contributed to the theory.

Having analyzed the data and processed it to identify the core categories, the transcripts and field notes were secured to ensure that they were accessible for confirmation and ratification of the data.

3.4.2.3 Storage and safety of data collected.

Audio recordings, field notes and transcriptions of the interviews were all digitally recorded in a password protected computer environment. Hardcopy records of the interviews, correspondence and data analysis in both audio and text formats were placed in secure locked storage. The identity of participants and any persons referred to in the interviews were protected by use of coded identities. The participants in the interviews were identified in the transcripts using a combined alphabetical and numerical set of codes (e.g. A10, B 07).

3.4.3 Researcher's relationship to the research subject.

The researcher continued to be the coordinator of the Formation Program in which the participants in the research trained. As such, he was required to clearly state the process and intention of the research and outline how confidentiality and role relationships would be managed in conducting the research. To ensure the research remained ethical, the researcher

committed to follow the protocols and guidelines for ethical research as proposed by the Australian Catholic University.

At the time of gathering data, the researcher had eighteen years' experience in spiritual direction practice since graduating, and thirteen years in teaching spiritual direction formation. He brings the perspective of student, practitioner and formator to the research project. Glaser (1992) contends that "professional experience, personal experience, and in depth knowledge of the data in the area under study truly help in the substantive sensitivity necessary to generate categories and properties, provided the researcher has conceptual ability" (1992, p. 28). This statement highlights the key contribution the researcher's past experience and acquired knowledge bring to the grounded theory approach to research as "an asset and not a liability" (Fendt & Sachs, 2008, p. 450). The researcher's firsthand experience of the program contributed to a deeper theoretical understanding of the research subject and field (O'Reilly, Paper & Marx, 2012). Bowers (1989) also proposes that the researcher, rather than being neutral, detached or objective, needs to intentionally immerse him or herself into the world of the research subjects. However, awareness of how the researcher's experience could influence or force the data also needs to be taken into consideration in terms of the relationship of the researcher to the participants (Mikecz, 2012).

Several practical implications emerged from consideration of the background and current roles of the researcher. In view of the fact that the researcher was actively involved with the program under examination and had an ongoing relationship with many of the participants, consideration needed to be given to ensure that these roles and relationships did not adversely influence the manner in which data was gathered or analyzed (Mikecz, 2012). Ethical issues of power imbalances in the researcher/ participant relationship were considered due to the researcher's role on the teaching staff of the program in which some of the participants were still students (Wirth, 1997). The researcher was particularly aware of the possible influence of previous and current roles impacting the credibility of the data collected. Given that some current students participated in the interviews, it was important that the researcher approached the interviews sensitively and with transparent awareness of the possible power dynamics that could impact the interview process (Darwin, 2000; Mikecz, 2012).

The principles of symbolic interactionism, as discussed in the theoretical perspectives section of this chapter, became relevant in consideration of the roles the researcher and participants saw themselves in during the interview process. The interaction between the

passive “me” and the reflective “I” self-concept came into effect when considering these relationships (Aldiabat and Navenec, 2011). The passive “me” of the researcher needed to be aware of the roles he took on as part of the interview process so as not to adversely influence the participants as they shared their perspectives on the program.

The researcher was aware that when participants made direct reference to the researcher’s own contributions to the course this influenced his listening and analysis. An example of this was when one respondent stated “what I came up with is that we listen to the presentations which are tremendous, especially yours, and I am not saying that because you are here” (B11). Comments like this can shift the researcher into the “me” role of either formator or even friend which can distract from the data being presented. Similarly, the researcher needed to be aware when there were critical comments like “There needs to be some pre-reading before the course so that before we start meeting with pilgrims we have some idea.” (F09). In this latter case, the temptation in the researcher was to become defensive and take on the “me” role of defender of the course, knowing that pre-reading already existed in the program. Awareness of these reactions in the researcher provided a check on potential bias in the collection of data.

In classic grounded theory, such awareness becomes another source of data (Deady, 2011). In relation to being aware of the dynamics in the interview, Glaser (1998) comments that “bias is just one more variable and it is automatically controlled for amongst honest researchers” (1998, p. 143).

Conversely, the researcher also needed to be aware of the role from which the participants were speaking as they contributed to the data through the interview process, recognizing previous and current relationships of authority and influence. These different scenarios highlighted the challenge that existed for the researcher to navigate previous relationships and to develop a rapport in the interview setting with the participants that promoted appropriate self-disclosure (Mitchell & Irvine, 2008). The debate around the role of rapport, especially empathy, in the process of interviewing is concerned with the level at which it is genuine and the need for “sensitivity and respect for participant privacy and subjectivity” (2008, p. 37). Some feminist scholarship has focused on the significance of relating to participants on the basis of positive reactions and trust as a way of developing relationships that are open and free for participants to share what they have discovered with minimal influence from researchers (Mitchell & Irvine, 2008).

Looking at the process from the interpretivist perspective, awareness of the various roles of the researcher and the participants contributed to minimizing the effect these roles may have had in distorting the participant's interpretation of their experience (Goldkuhl, 2012). This was also relevant to the processing of the data by the researcher who subsequently interpreted the data provided through perspectives generated by the roles both parties adopted during and subsequent to the interviews. In the case of the researcher, the "me" self-concept may have shifted from the researcher to the formation coordinator to the previous student role depending on what was being triggered in the various stages of interviewing and processing the data (Aldiabat & Navenec, 2011). A reflexive awareness of these shifts and their impact on the interpretive process is essential to minimizing their influence on the processing of the data.

The researcher's voice only became active in the processing and interpretation of the data and the identification of categories and sub-categories subsequent to the interview process. This was consistent with the symbolic interactive framework and classic grounded theory methodology (Glaser, 1992).

Having outlined the role of the researcher in the project, the trustworthiness of the study based on the research design outlined above is discussed in the following sections.

3.5 Trustworthiness of the Study

A key challenge in research has been to establish whether the outcomes can be trusted as contributions to the wider field of research. In quantitative research the quality of the findings and outcomes are described in terms of *rigor and validity* while in qualitative research the terms used are *credibility and trustworthiness* (Cope, 2014). Lincoln and Guba (1985) identified a set of criteria for establishing the trustworthiness of qualitative research. They identified the key criteria for research outcomes as: *credibility, transferability, dependability and confirmability*. These criteria are examined in relation to the current research project to identify how they apply to the approaches undertaken in this study.

3.5.1 Credibility.

Credibility in qualitative research design relates to the consistency and accuracy of findings of an investigation or inquiry (Ary, Jacobs, & Sorensen, 2010). To establish credibility within this qualitative research context, consideration was given to what measures needed to be taken to match the concepts and theories developed with the data presented.

Glaser (1998) uses the term *fit* (1998, p. 236) to describe this aspect of trustworthiness in grounded theory.

One of the measures applied to research design to promote credibility has been described as *triangulation* (Denzin, 2012; Flick, 2007). *Triangulation* proposes that for research outcomes to be credible, research needs to be designed and developed to take into consideration a variety of perspectives from which the researcher can view the research subject. As Flick (2007) observed “these perspectives can be substantiated in using several methods and/or in several theoretical approaches” (2007, p. 41). In this study, it is argued that both the inherent processes of classic grounded theory and the range of epistemological perspective provide avenues for triangulation.

Grounded theory provides an inbuilt triangulation process by providing a variety of perspectives through which data analysis can be managed and findings evaluated (Denzin, 2010). As Denzin (2010) noted, “traditional positivist GT [Grounded Theory] stresses the importance of correspondence theories of truth, objective inquirers, and processes of discovery” (p. 296). These perspectives, built into classic grounded theory practice, contribute to a type of triangulation that promotes credibility in the research process as outlined above. The application of constant comparison in the theoretical sampling processes of grounded theory enables ratification of the credibility of the findings (Glaser 2008) and this occurs when considering data from different participants relating to the same core category to identify common and/or distinct elements within the data. By comparing the data, the researcher sought to create new theoretical understandings of the situations with a view to establishing the best *fit* (Glaser, 1998) between possible concepts and their integration into emerging theories (Holton, 2010).

The use of a range of epistemological foundations provided another avenue of triangulation by engaging the intrapersonal, interpersonal and transpersonal perspectives of constructivist, constructionist and social constructionist approaches to meaning making (Gunnlaugson, 2007). In examining epistemological foundations in the context of education, Quay (2003) comments that “constructivism, social constructionism, and cultural discourses provides a structure within a holistic educational philosophy that allows a deeper analysis of experiential education” (2004, p. 107). By adopting a range of epistemological foundations, this researcher was able to examine the data from three distinct perspectives which enabled him to cross check the data through the avenues of the participants’ perceptions using constant comparison, as well as drawing on the shared understandings of the researcher and

individual participants and the broader contexts represented in literature and traditional, communal perspectives (Denzin, 2010).

While maintaining a credible approach to research, the study also addressed the need to establish the transferability of the findings of this study to other contexts.

3.5.2 Transferability.

Transferability relates to the extent to which the outcomes of particular research apply to other situations, contexts or groupings (Ary, Jacobs, & Sorensen, 2010). In grounded theory texts, Glaser (1998) refers to transferability as the *relevance* (1998, p. 236) of the research. Others have suggested different ways of describing transferability that are nuanced to the “factors influencing transferability, research methods to produce transferable data, and the development of validated criteria to assess the transferability” (Alla, Cambon, Minary & Ridde, 2012, p. 11). Terms such as *external validity*, *generalizability* and *applicability* (Alla, Cambon, Minary & Ridde, 2012, p. 11) have been used to express transferability in different contexts.

External validity has been described in terms of the “characteristic of the studies which provides the basis for generalizability to other populations, settings, and times” (2012, p. 11). In the context of this study, this characteristic could relate to the spiritual direction focus or to this formation program that shares common characteristics with other programs having the same focus. However, even when common characteristics have been identified, there would need to be an examination of the way each characteristic is understood within the base research and what other elements within the current course could have influenced the outcomes making them invalid in other contexts.

The findings of this project substantially relate to a spiritual direction formation program. The intention was that the theory developed from this research would have some relevance to similar spiritual direction formation programs, albeit limited by contextual issues, traditional perspectives and worldviews of students and formators within these programs. The *relevance* (Glaser, 1998) of this research project could also be established on the basis of the relationship of the program it is investigating to spiritual direction formation programs locally and around the world that share its traditional and practical perspectives. This would depend on the *applicability* of the theory generated to the other programs. *Applicability* in this context refers to how many of the recommendations or theories

generated in this research could be applied to other similar programs (Alla, Cambon, Minary & Ridde, 2012).

Another potential avenue of transferability relates to programs that engage in teaching spirituality related courses where they share some of the curriculum design elements in common with the spiritual direction formation program investigated in this study. In this case the term *generalizability* would be a more apt way of describing whether the theory relates to another context that did not directly equate to the program being studied. According to Alla, Cambon, Minary & Ridde (2012) *generalizability* relates to the potential relevance of the findings to be generally applied to a wider and unspecified range of situations.

Transferability between programs depends on the degree to which there is *fit* (Glaser, 1998) between the programs (Finfgeld-Connett, 2010). This also relates to whether those outside the study who were reading and applying the results find meaning associated with their own experiences or circumstances (Cope, 2014).

In this study, the researcher identified in detail the spiritual direction program and participants to establish where the data emerged from and how it was being applied. In the analysis of the data, the contributions of participants to the data were cross checked with other participants to broaden the scope of the results to increase the possibility of its application to other contexts and circumstances.

While establishing the extent to which the findings of this study could be transferable, the dependability of the findings also needs to be addressed to indicate the veracity of the theory and recommendations that emerge from the study.

3.5.3 Dependability.

While quantitative research requires *reliability*, qualitative research applies the term *dependability* to describe the trustworthiness of research outcomes (Ary, Jacobs, & Sorensen, 2010). This includes showing that the methods used are consistent and could be replicated (Cope, 2014). The process also involves being able to establish that the methods used are appropriate to the situation being researched. There is also the need to ensure that the data and processes are clearly documented and the findings could be related to external sources (2010).

In the current research, reliable sets of outcomes were created when due diligence was undertaken to accurately record and transcribe interviews and conversations. Field notes were

prepared during and immediately following observations and interactions to enable consistent records to be produced to form the basis of data analysis. The interviews were digitally recorded and the text of the interviews transcribed to provide an accurate and detailed account of the participant's contributions for later reference and confirmation. As the findings were conceptualized, the literature review became an external reference against which the findings were compared and contrasted (Ary, Jacobs, & Sorensen, 2010; Glaser, 1998).

The dependability of the results reflects on the ability of the study to confirm the outcomes of the research as unbiased and neutral in the theory and implications proposed by the researcher. This aspect of trustworthiness of the study is addressed in the following section.

3.5.4 Confirmability.

Like *objectivity* in quantitative research, *confirmability* refers to the level of neutrality or lack of bias in the processing and interpretation of the data (Ary, Jacobs, & Sorensen, 2010). *Confirmability* can be demonstrated by researchers clearly outlining and following procedures related to how they process the data and how the findings emerge from the data (Cope, 2014).

The classic grounded theory approach adopted in this study was designed to minimize bias and to promote neutrality in the processing of data (Denzin, 2010). Unstructured interviews were used to limit the influence and bias of the researcher in collecting and processing the input from participants. Records were kept of transcripts, field notes, memos and observations to ensure that data can be independently accessed if there is a need to confirm that the study was reliably processed and accurately reflected the material used to establish the concepts and theories on which the research outcomes are based.

The study however recognises that there are limits to what can be claimed and the extent to which the findings and theories emerging from the data can be applied within broader contexts. The next sections explore the limitations of the study both in its terms of reference and the factors that were not considered due to the predetermined scope of the research subject.

3.5.5 Limitations.

The research project was limited to a spiritual direction formation program within an ecumenical Christian formation context. The formation program is informed by an open

agenda approach to spiritual direction with participants from a range of traditions. As a result, some particular traditions of spiritual direction are not accounted for in this study. This limits the generalizability of the findings of the project to the formation program that is the subject of this research.

The research was also limited to consideration of the learning processes within the formation program and excluded exploration of other aspects such as the management and administration of the formation program. The study also avoided engaging in an examination of the curriculum content of the spiritual direction formation program. This was the result of determining that the focus of the study was on how participants experienced learning rather than concentrating on what they learned. These limitations defined the scope of the study.

There were also other factors that contributed to the delimiting of the focus of the study and these are considered in the next part on the trustworthiness of the study.

3.5.6 Delimitations.

As discussed in chapter 1, certain delimitations were established to both contain the scope of the research and to acknowledge the potential impact on participants in the research. One of the key delimitations was that the research was based on the participants' reflections as they related to the research questions. The formators were not interviewed so that the data was generated purely from the participants' perspectives.

No other surveys or quantitative methods were used to gather data for this research project. The most relevant data pertaining to the perspective of the participants were provided through the unstructured in-depth interviews as discussed in the methodology section of this proposal.

The study focused on factors that related to processes that impacted learning rather than specific adult teaching methods employed to facilitate the learning. This led to the focus being placed on the participants' perspective of what contributed to their learning rather than on the formators' or teachers' perspective of how the learning was facilitated. While there was a close relationship between the two perspectives, this study focused attention on the factors that participants identified as influencing their learning.

Selection of participants in the study was restricted to final year participants and graduates from the previous six years of the spiritual direction formation program at the time of interviews. This range of participants was chosen to concentrate on the most recent

experiences of the formation program. The selective choice of this range of participants took into account two factors. There have been some significant changes within the program, so if participants had been chosen from among graduates across the years since its inception, that would have contributed to a very dense set of data. By limiting the participation to recent graduates and current students, focus was given to the factors that contribute to the learning processes of the formation program in its current formats. Secondly, more recent participants were chosen on the understanding that they would have greater capacity to recall details of their learning experiences than earlier graduates.

Details of the curriculum content of the program and the traditions from which the practices were sourced were not examined. The focus of this study was on the impact of the formation program and the manner in which it was applied in the learning process with the participants. In examining a program of formation within a particular spiritual direction tradition, the distinctive understandings of various spiritual direction traditions (Vest, 2003) are not seen to be relevant to the learning processes of the formation program from an adult learning perspective. Different traditions may vary in their approaches to the formation of spiritual directors. However it is beyond the scope of this study to address the specifics of how the various spiritual direction traditional approaches would impact the formation of spiritual directors.

3.6 Conclusion

This chapter has outlined the epistemological and theoretical perspectives that have governed this qualitative research project in examining the impact of a curriculum program on the formation of spiritual directors. Located in the social science field, this qualitative study investigated the impact on participants' learning of the formation program in forming them as spiritual directors. The methodological framework for this study was premised on the philosophical understanding that meaning, whether individual or corporate, is constructed based on social influences. Unstructured in-depth interviews were employed to gain insights into the students' perspectives of the program. The interviews also assisted in identifying how participants came to construct meaning out of their social interactions. The data from the interviews were analysed applying inductive principles with a view to classifying categories and theories as they emerged from the data.

The following chapters will document the findings that emerged from the data and describe the categories that frame the findings to provide a basis for locating theories that

relate to the findings. Emergent categories are identified and analysed in relation to the literature reviewed in the previous chapter.

Chapter 4 Formational and Contemplative Factors in Learning

4.0 Introduction

This chapter presents the findings generated from participants' perspectives of their involvement in a curriculum program for the formation of spiritual directors. As outlined in Chapter Three, the research draw on the principles of classic grounded theory (Strauss & Glaser, 1967) to categorize the participants' perceptions of how the curriculum program contributed to their formation as spiritual directors. The insights from each set of interview texts generated by the participants was constantly compared (Strauss & Glaser, 1967) and four distinct categories were identified, each with sub-categories.

This chapter reports on the first two categories of findings and proceeds to discuss and analyse these findings in the light of the existing body of literature and the voice of the researcher. Chapter 5 continues in this vein with a focus on categories 3 and 4. The Categories are:

- Category 1: Formational approaches to learning
- Category 2: Contemplative processes of learning
- Category 3: Role of formators in learning
- Category 4: Learning community as teaching context

The findings are supported by insights from the participants' interview transcripts. Consistent with the ethical considerations for this research, an alpha-numerical coding system as outlined in Chapter Three, has been applied to eliminate direct reference to interviewees' names in the manuscript.

The following sections examine the first two categories in the findings that relate to the philosophical and practical aspects associated with the learning processes within the spiritual direction course. The first of these categories gives a brief overview of formational factors influencing the learning environment and proposes alternative ways of framing the relational understanding of participants' engagement with the learning process. The second category explores the various elements that contribute to contemplative processes of learning (Brady, 2007; Duerr, Zajonc & Dana, 2003; Gunnlaugson, 2009; Hart, 2004; Seidel, 2006) as key factors impacting the participants' learning in their formation as spiritual directors.

4.1 Category 1: Formational Approaches to Learning

Spiritual direction training has been described as a process of forming spiritual directors (Nicholson, 2014; Smith, 2014). However there has been much discussion among formators of spiritual directors about what this means and how it can be conceived as a model for learning. In categorising the findings, four sub-categories were identified that inform a model describing the nature of formational learning as it relates to the spiritual direction formation program that is the subject of this study. They include: collegial engagement in the learning process; the quality of relationships; the interactive aspects; and cognitive and contemplative interchange.

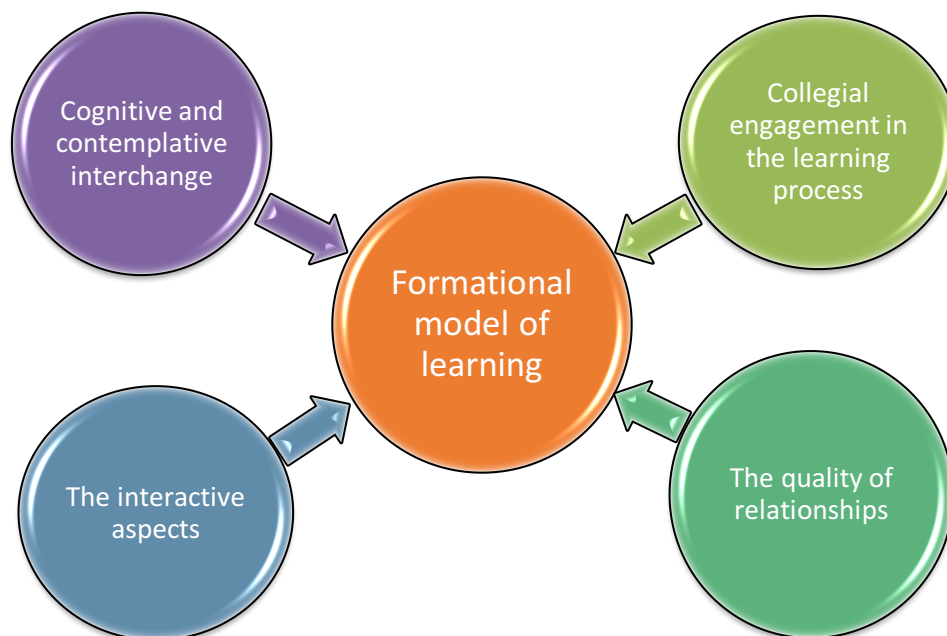


Figure 4.1. Elements of formational learning.

These sub-categories are represented in Figure 4.1 and are explored in the following section to ascertain their relevance to participants' learning processes within the spiritual direction formation program.

4.1.1 Collegial engagement in learning.

The first sub-category focusses on the collegial engagement in the process of learning. Collegial engagement describes the cooperative group commitment to learning together that

is evidenced in the participants' reflection on their learning experiences in the formation program.

Participants observed that the learning experience they encountered in the formation program focussed on them working together in the learning process. This involved them listening both to each other and the members of the formation team. The implications of this approach are that everyone is seen as contributing, irrespective of their roles in the learning process. This suggests a collaborative approach to learning that engages everyone present in working together to enable learning to happen. The process of collegial engagement and collaboration is seen to be modelled throughout the program which identifies it as a core element within the formation process as expressed in the following comment.

The supervision sessions were modelling spiritual direction. There was time to listen together and it was not about the expert but about working together which was very much modelled in those supervision sessions. This was modelled through the whole program in how all the sessions were conducted. The teaching sessions, quads or triads and the verbatim sessions were all modelled the same way throughout the whole program. (D07)

Collegial engagement is seen to model what happens in effective spiritual direction, which further contributes to the learning process. By working together participants are able to learn from each other and contribute to each other's formation as spiritual directors.

Another aspect of collegial collaboration was observed to be the companionship that participants experienced as part of sharing together in the learning process. By sharing in the common experiences of being formed as spiritual directors, participants came to see that they had differing perspectives and ways of practicing and learning. These differences were highlighted in practical sessions that involved a level of personal disclosure requiring a level of vulnerability. Participants experienced a willingness to be authentic in sharing honestly with their peers and being open to trust them in the process. This reflects a significant quality of companionship that impacts participants' involvement in the learning process. The level of trust in collegial companionship encourages participants to venture beyond the safety of the known to risk sharing aspects of their experience. This was seen in their willingness to engage in contributing to the learning process for the mutual benefit of all involved. An aspect of collegial engagement is conveyed in the comments as expressed below about the experience of a shared journey of learning.

It was important to have people who are journeying with me in a sense. They were on a similar or same path but doing it differently which was really important for me. I cannot imagine doing it on my own. The practice we had in spiritually directing and endeavouring to share with one another highlighted the honesty and trust associated with that, which was very powerful. (E12)

The impact of collegial engagement on the participants was deepened by the manner in which they experienced their companionship together in the process of sharing beyond the comfortable limits of conventional social exchanges.

Some participants were stimulated by their involvement in the collegial group engagement through collaboration and companionship in the learning process. They noticed that the group assisted them in being able to get in touch with what they needed to learn and practice. This contributed to their experience of the learning community having an additional dynamic that, while not necessarily being comfortable, resulted in the essential aspects of learning. The mutuality of collegial engagement promoted participants' ability to explore, question, share difficult experiences together and ultimately grow together. An example of this aspect of collegial engagement is expressed in this reflection on the learning community.

I feel most energised being in a group setting. I find that when you have a group that stay together for a few years it is no longer just a learning community. It is a living community. The community was able to move to where I needed to go and this is what I need to learn and I can practice. If the person turns out to be not as comforting, you may not like it but anything can happen in the cohort. I have a mutual place to explore vocation, to experience trouble together, to ask questions and to grow together as a spiritual director. (H13)

The common theme reflected in each of these accounts is the importance of collegial group engagement in the process of learning in a spiritual direction formation program. The contribution of the group engagement expressed collaboratively in companionship with others in the group is seen to enhance the learning processes that participants experienced in the formation program. In addition to the significance of collegial engagement in learning has been the quality of the relationships that developed within these collaborative groups as alluded to in this section. The quality of relationship is further explored in the next section.

4.1.2 The quality of relationships.

Through engagement in a range of activities and conversations in the course, the learning process was deepened as a result of the nature of participants' relationships with each other within the learning environment. When participants engaged in contributing to group learning with openness and integrity, there were significant shifts in the level of engagement with the learning process. This resulted from the development of trust and openness that led to a deeper involvement in the learning processes. The quality of peer relationships moved to more profound levels and occurred more rapidly than previously experienced by participants. The deepening relationships contributed to participants becoming more confident and motivated to participate in the learning processes. This assisted them in integrating the various aspects of their experiences and developing the ability to learn and relate to others. This was reflected in comments such as the one below about group dynamics in the practical sessions.

Another factor was the quality of the people in my peer group. I was overwhelmed by the integrity and openness of the people. In our practice sessions we went deep very quickly and I found that to be life giving. It helped me to keep growing. The trust that was established seemed to be at a very high level, very early in the course. It was because outside the sessions we didn't go anywhere near what we had talked about in the session. (S13)

The relationships between participants developed around a sense of trust towards each other. Their trusting relationships are reflected in a willingness to maintain confidentiality within the group that further integrate their relationships and the process of learning. They recognise their relationship with their peers as a key component in the learning process. Trust, integrity and openness mark the active exchanges between participants which contributes to deepening and accelerating learning. An empathy grows out of the trust and integrity between the participants which enhances the way they relate to each other (Stern, 2013b). Respecting each other's contributions influences the interactions within and beyond the primary learning contexts where participants notice the impact of their deepening relationships.

As well as experiencing the affirming and supportive aspects of trust, integrity and openness, participants described experiences that related to being challenged and confronted within their learning experiences. Having to engage in one-on-one encounters within group

contexts provided challenges as well as creating deeply valued learning environments. There was recognition that participants could confront each other or take risks within the learning context without others taking advantage of their vulnerability. The following account from a graduate participant provides some insight into the relational dynamics present in interchanges within the learning process.

The context of a spiritual direction session is challenging for pilgrims and also the director. My experience of formation was that these types of encounter were an ongoing occurrence. Throughout the years the practical sessions continued to be quite challenging and confronting and that was the nature of the subject matter and the exploration. When you got used to it and became accustomed to the one to one experience it was really healthy and a sacred space. It was about overcoming fear and moving more to trust. It was about taking a risk and seeing what comes out of that. I constantly found those images being role modelled and lived through the course which was a great help. (K10)

The participants' trust in responding to the challenges and risks associated with participating in the practical one-on-one session contributes to the development of a learning environment that produces vigorous interactions in the learning process. When trust exists within the group, participants are able to overcome their reservations and be vulnerable with a view to seeing what might emerge out of the encounter. The willingness of participants to take risks and venture beyond the predictability and safety of shared group identity results in them discovering new insights in relation to their practice as spiritual directors. They also come to experience the learning context as a significant learning space that they see as sacred or hallowed and revered. This suggests that there is significance for the participants beyond the process of learning and formation.

The development of qualities such as trust, openness, and integrity provide the foundations for deepening the learning process through a readiness to share in the group. These qualities also contribute to creating a learning environment in which participants can take risks in confronting and challenging one another within a safe and trusted space. As a result, the participants can relate what is emerging among them to their practice of spiritual direction.

As well as the qualities of relationship and their impact on engagement with the learning process, participants also perceived that there were aspects of the way they interacted that influenced their learning. This is explored in the following sections.

4.1.3 The interactive aspects.

The interactive aspect of learning occurred when participants engaged with each other in contributing directly to the learning process. When participants engaged with each other and formators within the learning context, their participation in learning was enhanced particularly as it related to sharing of personal experiences and insights.

The focus on the interactions between participants in the learning process promoted awareness of both course content and relationships in the learning cohort. The participants' engagement with the learning process shifted from an emphasis on just receiving information from the formators to noticing the contributions of others in the group. This resulted in broadening their awareness of a range of perspectives. The interactive nature of the group contributed to the assimilation of the curriculum content with what was emerging through the group dialogue in a way that extended learning. This resulted in participants gaining from the crossover between their perceptions of experiences and other's input into the learning process. The participants more readily integrated the learning through these interactions in ways different from what they had experienced previously. The following statement captures the general sense of shift in awareness emerging out of the group interactions.

The learning process was always very interactive. The nature of the way it was done meant that I learned very quickly and it was absorbed in a different way. You listened and engaged with material which was a very useful way to learn. The interactive model was really helpful because I was not only interacting with my experiences but also with what was coming up for other people. (I13)

Awareness of the interactions brings focus to what occurs between the participants and becomes a pertinent factor in deepening their learning. The interactive nature of the program contributes to extending awareness of how other people's experiences and perspectives enrich individual participants' learning processes.

The quality of interactions also contributed to the way participants engaged with each other in group work which promoted the integration of the groups' input into the learning process. The attitudes expressed in interactions between participants affected the nature of the

group. Group interactions were viewed as an opportunity to learn from each other rather than as a passive reception of information or a working task to be endured. These interactions were experienced as being similar to those between host and guest. As a result, sharing in the group came to be seen as significant acts of hospitality in which participants served each other. Interactions were observed to be freely offered contributions that were generously exchanged within the group. The impact of these acts of generosity on the group was to create an atmosphere in which participants valued their peer's contributions to their learning. The valuing of the contributions that emerged in the learning context was again perceived to be uniquely special or sacred. This translated into a sense of collegial awareness of the greater context of life that unified the group and made them aware of influences beyond the group. This was echoed in comments about the group sharing captured in the following statement.

It was such a privilege when you shared in the group. It was like you were contributing to your peers or receiving something from them as a guest. Whether you gave or received, it was a wonderful gift. It maintained a sacredness of our being together. This was a reminder of being led by a spirit that was present with us and moulding us together. (R13)

The qualities of interactive engagement in the formational learning context are evident in the recognition of colleagues as valued contributors to participant's learning. The dynamic in the relationships between participants reinforces the transpersonal nature of constructive relationships and the effect this has on the learning process associated with experiencing this approach.

The participants also observed that as well as there being an impact on learning from their relationships, there was a parallel influence on the cognitive and contemplative processes of learning. These aspects of the formational learning process are explored in the next section.

4.1.4 Cognitive and contemplative interchange.

Participants perceived there was a complimentary relationship between the cognitive and contemplative processes in learning. Following discussions in their practical sessions, participants had been able to develop conceptual understandings by having space to reflect deeply on what occurred in the sessions. They identified the contemplative aspects of

learning as an essential partner in making sense of the cognitive concepts that emerged as they engaged in examining the practical aspects of their spiritual direction sessions,. An example of the cognitive processing interacting with the contemplative process of learning was expressed in this statement.

The supervision program involved debriefing after being in the role of spiritual director. This involved supervision of my practice. Being a head person, the opportunity to conceptualise what was actually happening in spiritual direction was helpful. This was particularly so around the deepthing and holding space. The chance to actually reflect on what was going on there was important for me. Underlying it all was the definite sense of a contemplative style which undergirded it. (Q13)

The participants experienced the learning space as a *holding space* (Winnicott, 1964) – a safe environment in which interactions occur. This space became associated with the ability to deepen the participants' engagement with the cognitive learning process as they contemplatively reflected on their practical experiences.

Other participants also made similar connections between the cognitive and contemplative processes of learning and related them to what they referred as the *sacred space*. This space was understood as not only connecting the cognitive and contemplative processes of learning but also promoting the connection between participants in the learning process. These connections enabled participants to observe the relationship between the cognitive constructs that developed as concepts and participants' personal responses to what they were experiencing and learning.

The learning was less about head knowledge and more deeply grounded in the contemplative approach. There was enough head engagement going on at the same time but it was about giving space for it to percolate and see what we end up with. There was that sense of the sacred space together that deepens a kind of connection with each other to be able to step aside from having to figure things out and just reflect and learn. This was not just about the technical concepts but also what we were learning about our responses to what we were experiencing. The learning process was not just about practising a system but also about embodying it and learning through the experience. (I13)

The formational learning process provided the space to think conceptually about the implications of the experiences as well as providing space for participants to relate it to their personal responses and reactions. This contributed to them developing an understanding of cognitive concepts in association with their lived experience of what happened physically and emotionally within themselves and others in the process. The relationship between the sensate and cognitive aspects of experience is also reflected in this statement. “It’s been very important that it’s been a physical experience not just knowledge. I spent a lot of time paying attention to my gut and my heart and my tears” (C12). The contemplative approach in conjunction with the cognitive approach enables participants to notice a range of dimensions of their experiences that provides to a more holistic learning experience. The formational learning process contributes to an integration of the cognitive and contemplative processes of learning that result in a deeper, broader learning experience for the participants in the program.

4.1.5 Overview of the nature of formational models of learning.

A distinguishing feature of this study is that it uses empirical data obtained from participants’ perspectives to identify several distinctive contributions of a formational approach to participants’ learning. The collective, collegial engagement of participants is seen as a significant influence in involving them in the learning processes both for themselves and for their peers. The group context provides opportunities for participants to explore, question, challenge and discover new insights through the interchanges within the learning community of their peers and formators. This aspect of the learning process highlights the benefits of group engagement in the formational approach to learning in comparison to more individually focused approaches.

The formational approach to learning is also characterized by the quality of relationships and the nature of interactions which result in the integration of experiences with the learning process and a sense of connection between participants. The learning process is enhanced by the quality of relationships which are characterised by the trust, openness and integrity that emerges within the formational learning space. These qualities of relationship encourages participants to value each other’s contribution to the learning process. They also contribute to participants being able to be vulnerable and taking risks in challenging each other to discover new insights and awareness in relation to what they are experiencing and

learning. Participants experience an integration of their shared experiences and insights as a result of the relationships that develop between them in the learning environment.

The interactions between participants assist them in discovering the interplay between their life experiences and those of their peers and how these relate to the content of the spiritual direction course. The development of relationships among participants and formators contribute to participants engaging more fully in the learning process. The interactive nature of the learning process enables participants to become aware that their input contributes to others' learning. The process it is not just about their acquisition of knowledge and skills but also about affirming them as valued contributors to the learning processes both for themselves and others.

In the formational approach to learning, participants also recognise the interplay between the cognitive and contemplative processes of learning. Each process compliments the other in the development of both their conceptual and personal understanding of what is occurring. The conceptual development is enhanced by engaging contemplatively in reflecting on the experience. The participants also become aware of how they personally respond and react both physically and emotionally to the experiences that are part of the learning process.

The findings associated with Category 1 suggest a formational model of learning that involves the collegial engagement of participants based on the qualities of trust, openness, and integrity. This model also is based on an interactive approach to learning that allows for risk taking in being vulnerable and challenging each other to promote deepening engagement with the learning process. The integration of both cognitive and contemplative approaches to the learning process further enhances the expression of this model of learning. This occurs by assisting participants to relate their conceptual understanding with their lived experiences.

4.2 Discussion of Category 1: The Formational Approaches to Learning

The findings indicate that a high quality collegial and interactional formational approach to learning had a significant influence on how the participants engaged with the curriculum program in the spiritual direction course. This influence is noted in relation to three aspects of relational interaction. They include: the role of space in the learning process, the impact of quality collegial relationships, and the significant nature of interactions. These

aspects of the formational learning process are explored in this section of the discussion of findings.

4.2.1 The role of space in the learning process

One of the themes that emerged out of the data relates to the significance of space in the learning process. Participants variously described the space as “sacred space” (I13), “depthing and holding space” (Q13), “safe space” (K10), “pretty, scary space” (T11) and “mutual place” (H13) to name a few. The participants described these spaces as places where they engaged with each other in the learning process. Collectively these spaces are referred to as learning spaces that develop out of the collective collegial interactions of participants in their formation program and beyond. The location of these spaces is between or in the midst of the participants as they engaged with each other in learning.

The descriptions that participants in the learning process used to describe these spaces highlight the multi-faceted significance of them. The reference to *sacred space* suggests a sense of reverence in which the space is generated and maintained. This description also implies a transpersonal dimension to the space that invites participants to become aware of the broader dimensions present in the learning space. Describing the space as *depthing and holding* highlights two distinctive elements of the learning space. The *depthing* aspect of the learning space implies an effective outcome of participating in the learning space that results in engagement with more profound levels of awareness and insight. The reference to *holding space* reflects the concept that Winnicott (1964) used to describe the therapeutic context that resembled the protective and safe environment similar to a healthy relationship between parent and child. The term is closely associated with the reference to a *safe space*. However, some participants also experienced the learning space as *pretty, scary* or vulnerable space.

Another description that reflects the experience of participants in the learning environment designates the space as a *mutual place*. This indicates that the space functions as a realm of interchange in which participants benefit from each other’s contributions into the space.

From an examination of the range of descriptions offered in the data, it could be said that the learning space encompasses a broader understanding than any one of these descriptions can provide. The space incorporates and extends beyond Winnicott’s (1964) description of the *holding space* or *environment* which implied a protected and safe space. The assumption behind the sense of protected space is that there is someone protecting the

space and usually this would be assumed in education environments to be the teacher. The uncertainty and unknown nature of the learning experiences that resulted in the space appearing to be *pretty scary* suggests that there could be a vulnerable and challenging aspect inherent in the learning space.

One scholar who explored the space that developed in the midst of personal and group interactive exchanges is Buber (2002) who describes these spaces as the “sphere of ‘between’” (Buber, 2002, p. 241). He proposes that such a space is generated in any situation in which two or more parties meet whether casually or intentionally.

In his discussion of the relationship between identities, Buber contends that the essence or “spirit” (1958, p. 39) of the interchange between participants is not sourced in any one party but emerges in the space between them. This indicates the need to explore what occurs in the space that is created in the midst of the learning group as a result of two or more participants engaging together in the learning process. For Buber (2002) the “sphere of ‘between’” (p. 241) is the place of encounter in which individuals go beyond their own limits of self-awareness to become aware of and respond to the presence of the other/s. The space encompasses the opportunities that participants observed as created when they interacted with two or more participants as part of the collegial, interactive approach to learning.

The learning space was perceived by most participants to provide both safety and holding while promoting deeper engagement with aspects of the unknown elements of experience which evoked a certain level of fear within some participants. This space is also experienced as a sacred and revered context in which participants sense a mutual respect for each other and an awareness of realms that extend beyond them. In the context of the learning process, this space or “sphere of between” (Buber, 2002) allows for a full range of engagement. This includes safe and protected exchanges as well as challenging and confronting interchanges which invite the participants to explore the unknown and unpredictable elements of their encounters.

While Winnicott’s (1964) term, *holding environment*, covers aspects of safety in relation to the learning space, a broader concept similar to Buber’s “sphere of between” provides more latitude for understanding the dynamic nature of this space. This study proposes that the learning space be described as a participatory learning space which conveys the notion that core to its functioning is the full participation of participants in the learning process. This allows for the range of experiences and descriptions offered by participants in

identifying it as a *sacred, deep, safe, holding space* that provides opportunities for *challenge, risk taking and confrontation* which can be “*pretty scary*”.

Having considered the concept of a participatory learning space, the influence of collegial relationships between peers in this space is explored in the following section. This is to ascertain how these collegial relationships impact participants’ learning and the learning space.

4.2.2 The impact of collegial relationships.

The focus on the collective nature of formational approaches to learning has highlighted the impact on learning of the quality of relationships within a collegial learning group. Evidence has been presented to highlight the relevance of relational factors, associated with a collegial approach, to the design of learning processes for a spiritual direction course. The discussion has identified some emerging insights and theories about what contributes to enhanced learning associated with a particular spiritual direction course.

The findings discussed thus far have highlighted the significant influence peer engagement in the formational process has on participants’ ability to learn and develop awareness of the factors that inform their practice as spiritual directors. In the collegial, interactive approach to learning, the participants’ active involvement in contributing to and processing the learning experiences highlights their central role in the learning process. Without dismissing the role of formators in the process, the collegial approach focusses on what the participants bring to the learning space and their role in deciphering its relevance to their practice as spiritual directors.

This contrasts with the focus of the apprenticeship model that Nicholson (2014) proposes as an alternative way of understanding spiritual direction formation. In the apprenticeship model, the emphasis and focus of learning is on the master or experienced practitioner who models and guides the apprentice or student practitioner through the learning process. The argument offered by Nicholson (2014) for advocating the apprenticeship model is based on his personal experience of being formed in this type of approach to formation. The essence of the approach that he identifies as beneficial to formation is the focussed attention he received that extended over several years. He contrasts this approach to the didactic models of teaching formation. There are aspects of the apprenticeship model that are relevant to the processes associated with spiritual direction formation which will be explored in the role of formators in the process in Category 3.

However, the participants in the present study identified the primary significance of their interactions with their peers as one of the major influences on their learning.

The significance of the collegial interactive approach highlights the need for further exploration of the place of relationships within the learning context and how the quality of these relationships impact the participants' learning. The influence of the quality of the relationship between participants on learning is discussed in the following section.

4.2.3 The influence of quality of relationships.

This section reports on the qualities of relationship within the collegial, interactive approach and how they impact participants' learning in the spiritual direction course. The influence of the quality and attributes of relationships and their impact on the learning process emerge as distinct core elements influencing participants' learning.

Participants described the quality of relationships within the learning context as displaying trust, openness, integrity, and vulnerability or risk taking in their interactions with each other. These qualities are explored to identify their influence on participants in the learning process. Trust is identified as a significant contribution to participant's learning. The level of trust generated in group interactions is an indication of how participants rely on their relationships with other members of the group. As noted in the findings, the developing trust among the participants contributes to the deepening of the learning experience. This is expressed in them feeling more open to share personal reflections on their experiences encountered in the learning process.

The quality of trust extends beyond the superficial interactions of objective engagement to contribute to a level of relationship that allows for others to become privy to the more personal aspects of the participants' thoughts and reflections. By enacting trust within the learning process, participants deepen their level of disclosure to include aspects of their subjective awareness and their objective analysis that contributes to the enriching of the learning process. The depth of trust evoked within the learning space results in a comparable deepening of the quality of reflections and awareness of experiences shared among participants.

In other studies, the role of trust in the learning process has been explored in relation to the interactions between teachers and students (Lee & Schallert, 2008). In focusing on feedback to students, Lee and Schallert (2008) note that when students develop trust in the manner in which teachers interacted with them, they are more open to accept the suggestions

and feedback offered by teachers. The current study highlights the significance of trust between students or participants in their interactions within the learning space. While the findings of Lee and Schallert (2008) are also consistent with findings in Category 3 relating to the relationship between formators and participants, the focus here remains on the trust generated in the participants' peer relationships. The trust generated between participants promotes a willingness for participants to be more open to the challenges, questions and feedback from their colleagues than if they only trusted their formators or teachers.

The generation of trust amongst participants in the learning space also assists in deepening the levels of participation within the group. Significant levels of trust develop between participants within the learning space based on clear boundaries generated by a shared commitment to the maintenance of "deep confidentiality" (Parker, 2007, p. 160). Deep confidentiality refers to the agreement between parties to refrain from talking about what was shared within a learning group with others, or with those in the group, beyond the immediate group context. The confidence to share personal experiences and insights safely ensure that learning is not restricted to what is comfortable and resolved in participants' thinking or practice. This enhances participants' readiness to engage with each other and accelerates the rate of progress in the learning process to a deeper level.

Raider-Roth (2005) has noted that "trust in self is inherently linked to trust in others" (p.590). Buber (2002) goes further when he states that "trust in the world, because this human being exists – that is the most inward achievement of the relation in education" (2002, p. 116). The quality of trust in relationships associated with the collegial or second person intersubjective approach (Gunnlaugsen, 2009) reflects some of the relational characteristics central to the spiritual direction relationships with directees.

The *openness* of participants influences the expansion of the learning space which also enhances learning. The openness that participants experience in their engagement with others in the learning space suggests a broadening of their relationships and outlook regarding what is experienced within the group. The broadening of the learning space enables participants to become aware of the diversity of factors that constitutes the experiences they are processing. The openness of participants to each other also produces a sense of freedom in their ability to express themselves to one another. As well as the freedom experienced as result of the openness, the subsequent breadth of sharing reflects the complexity of situations encountered in the learning space that indicate the types of experiences that may arise in spiritual direction sessions.

Spiritual directors like most therapists are required to spontaneously respond to unpredictable and diverse experiences which do not necessarily fit within predetermined categories (Cozilino, 2004). This requires spiritual directors to be formed in an approach to learning and practice that embraces openness and models the development of an interactive space that contributes to directees being able to share the breadth of their experiences. Openness infers an honest and non-judgmental approach in relating to others and results in a more expansive view of what is shared within the group (Hartman & Zimberoff, 2008). The learning space is transformed by participants choosing to open themselves to each other creating a broader learning space in which experiences can be explored. This concurs with Hartman and Zimberoff's (2008) observation that openness is associated with a readiness and desire to participate in sharing experiences without feeling the need to have to defend oneself. Participants' openness in conjunction with trust in collegial relationships also involves them in risk taking in relation to the unknowns in situations.

The findings indicate that the *integrity* of the participants' relationships with each other promotes a learning space that allows for a more holistic and trustworthy learning exchange. The participants also identify integrity in relationships as a quality that encouraged them to engage more fully within the learning space. "Integrity" suggests the grounding of relationships in sincere and authentic exchanges. The integrity identified in the findings relates to the grounding of the learning space in real, lived experiences.

The observation that participants experienced a sense of integrity in what was shared reinforces the relevance of the content of the learning space to the participants' learning. Due to the integrity of what is shared in the learning space, there is a greater possibility that participants can identify the relevance of the content to their own experiences. While much of the literature relating to integrity in learning focuses on the educator's integrity (Groen, 2010; Naidoo, 2011; Steibel, 2010), this study has identified the integrity of the participants as a significant influence on their interactions in the learning space. The data indicate that it is the integrity of the participants, along with the formators, that creates an environment that enhances their learning. The integrity of fellow participants promotes a willingness of participants to deepen their engagement with the learning process.

The ongoing effects of trust, openness and integrity identified in the findings is demonstrated in the willingness of participants to be vulnerable in the presence of each other. The researcher understands vulnerability to be the readiness of participants to push the bounds of their own perceptions of the known, to extend beyond the safety of the learning

space and make room for new and creative possibilities. In seeking to outline a series of stages for contemplative enquiry, Palmer, Zajonc & Scribner (2010) list vulnerability as one of the key stages in the process of learning. They identify vulnerability with feeling at ease with what is not known or ambiguous and uncertain. When participants move beyond their own frameworks of understanding, they engage with the process of co-creating with other group members out of a shared experience (De Quincey, 2000; Habermas, 1992). The quality of vulnerability contributes to participants exploring beyond the assumed limits of their experience to become open to the emerging insights within the learning process. By being ready to be vulnerable in the learning space, participants feel less constrained in going beyond the safe and secure bounds of previously accepted limits of expression to explore new horizons beyond the confines of the learning space.

The distinctive qualities of trust, integrity, openness and vulnerability go some way to addressing Gunnlaugson's (2009) question about the distinctive qualities of collegial or second person intersubjective approaches. "What discoveries await a graduate seminar or cohort group where conversations are oriented from a collective investment in speaking and listening that is attentive to what is emerging from the intersubjective worldspace of the class field of learning?" (2009, p. 46). In this current study, the qualities of relationships listed above contribute significantly to the shaping and functioning of the *intersubjective worldspace* for participants engaged in the processing of their shared learning experiences.

The qualities of relationship identified above appear to influence the dynamic nature of learning space in which the interactions between participants occur. This aspect of the study is explored in the next section.

4.2.4 The impact of quality of relationships on the learning space.

The qualities of trust, integrity, openness and vulnerability impact the nature and dynamics of the learning space which influences the outcomes of participants' learning. The learning space or "sphere of 'between'" (Buber, 2002, p. 241) is a dynamically changing space continually influenced by the relational qualities of the participants. The qualities identified in the findings suggest an impact on the learning space that goes beyond the nature of participants' interactions and conversations. The dynamic influence of the qualities, as outlined in the previous section, deepened, broadened, and pushed the limits of the learning space to provide a more holistic environment within the lived context of the spiritual direction formation course.

This study proposes that transformation occurs as a result of the quality of relationships that are reflected in the influences that contribute to the expanding, deepening and challenging of boundaries in the learning space. The qualities of trust extend beyond respect to express a willingness not only to respect another but also to allow oneself to be influenced by them and their perspectives. The effect of trusting other participants in this way suggests that participants are open to share more deeply in relation to their personal experiences that contribute to a subsequent deepening of the learning space. This corresponds with the description of the learning space as a *depthing space* (Q13) in which participants encounter more profound levels of awareness. There is a distinction between trusting and trying to make things happen. The former leaves room for things to occur that normally may not happen while the latter can restrict exploration by forcing the process (Hartman & Zimberoff, 2008). By trusting the group and entering the learning space in an attitude of trust, participants experience an expansion of the space in which they interact with their peers in the learning process.

The openness of participants, which flowed out of the trust they experienced, contributed to a broadening of the learning space through their willingness to disclose more extensively what they were experiencing or encountering. As Hartman and Zimberoff (2008) observed, being openly aware of experiences “allows for the greatest possible expansion of personal expression” (2008, p. 48). This study proposes that openness not only promotes an expansion of personal awareness and expression but also contributes to the expansion of the learning space. As a result of this expansion, all participants in the space benefit from a broadening of their subjective awareness and objective insights into the practice and understanding of spiritual direction. The openness of the space gives room for creative exploration and expression. This resonates with Zajonc’s (2013) concept of “open awareness” (p. 85) through which participants experience the spaciousness of creativity. By openly participating in the learning space, participants become receptive to what others share and the insights that emerge from their own reflection on these shared experiences.

Another quality that influences the learning space is the integrity of the participants in the learning space. The impact of the integrity of the participants’ contributions in the learning space assists in grounding their learning in real experiences that provides authentic foundations in the learning space. Integrity of interactions within the learning space also contributes to the integration of the various objective and subjective elements of the experiences shared. This relates to the transformative aspects of learning that Zajonc (2006)

identified with openness and integrity of participants' interaction which he sees as contributing to the breadth and depth of engagement.

Another aspect of relationships relates to the challenges and risk taking associated with involvement in the learning space that a participant described as "pretty scary" (T11). "Vulnerability" is a term used by participants to describe the sense that they experience in the learning space when they are confronted and questioned or invited to explore beyond their comfort zones. Openness to being vulnerable in their engagement within the learning space promotes participants' willingness to go beyond the bounds of the group expectations to explore the unknown and unpredictable aspects of learning experiences. Vulnerability encourages participants to venture beyond the accepted boundaries of the learning space to discover what might lie outside their limited experiences and insights.

The concept of vulnerability in the learning process is described by Zajonc (2006) as being "comfortable with not knowing, with ambiguity and uncertainty" (2006, p. 1747). In this study, the term reflects more than just the passive acceptance of these aspects of the learning process. The vulnerability of participants with each other also encompasses their active engagement with risk taking and challenging each other to explore new realms of experience and knowledge that contributed to their discovery of new horizons of learning.

Paying attention to the qualities of participants' relationships brought to the fore the impact the qualities of trust, openness, integrity and vulnerability have on the learning space. These qualities contributed to the deepening, broadening, integrating and transcending the learning space. It is the researcher's view that this contributes to a more holistic approach to learning in forming spiritual directors.

However the findings also highlighted other elements of the collegial approach that contributed to enhancing the participants' learning. This involved participants' awareness of the nature of interactions that evolved in the learning space that came to further define the learning space. The following section explores the nature of interactions and how they came to redefine how participants experienced the learning process.

4.2.3 The nature of interactions.

In seeking to describe the dynamic nature of the learning space between participants, the findings indicate a proactive and interactive image of the learning space between participants. The image of the learning space as a place of communal interchange is reflected in the way participants came to value their contributions to each other. There is the sense of

interchange, mixed with elements of hospitality, which comes through in the findings. These aspects capture something of the essence of the learning space as perceived by the participants.

The participants observed that the collegial, interactive approaches identified in this study were associated with the manner in which participants engaged in the process of sharing within the group. These interactions were marked by a mutual sense of giving and receiving in their interactions with each other. Palmer, Zajonc & Scribner, (2010) believe there is a shift from seeing involvement in the learning process as an obligation, to seeing it as a valued activity for learning. It would seem to the researcher that there is a mutuality in giving and receiving which indicates a full participation in the learning process that extends beyond the more passive stance of acquiring knowledge or insights. This indicates that the learning space is a participatory space that involves multiple avenues of engagement in the process of reflecting on and making sense of learning experiences. This is where Zajonc's (2006) stage of "participation" (p.1747) in his stages of contemplative enquiry requires expansion to include more than just the shared experience of being together. The manner in which participants in the spiritual direction course participate in the process adds to its impact on the learning process.

The participants experienced the exchange occurring in the space between them and saw it as expression of generosity that promoted deeper engagement within the group. The mutual honouring and valuing of peers' contributions to the learning space motivates them to more actively engage in working together to make the most of the learning experience. The use of terms like "guest" (R13) highlights the nature of the interaction between participants in the learning space as an act of hospitality (Blahut, 1997). In describing the nature of the spiritual direction relationship, Blahut (1997) observes that the spiritual director is traditionally seen as welcoming directees into their space as "guests". However, there is a real sense in which the directees become "hosts" as they invite the spiritual directors into their stories and life experiences. In this sense, the spiritual direction encounter becomes a participatory space in which both parties give and receive. This parallels with the conceptual understanding of the learning space as a participatory space in which each person acts as guest and host in giving to and receiving from each other in the process of learning. Rather than a *teacher centred* or *student centred* learning environment as Palmer (2007) observed, the learning space in the spiritual direction course is seen as a shared participatory learning space in which participants mutually contribute to each other in learning. The interactions

and experiences are freely offered into the participatory learning space and as such are considered as sacred gifts to be shared.

When participants allow themselves to participate fully in the learning space, they notice a shift that occurred within them. Their focus shifts from their individual agendas of competing or self-protection to collective agendas of trust, openness, integrity and vulnerability as outlined in the previous section. This resonates with the description of De Quincey's (2000) term "intersubjectivity 2b" (2001, p. 138) which refers to the highest form of the second person intersubjective approach as a "process of co-creativity, where relationship is ontologically primary. All individuated subjects co-emerge as a result of a holistic "field" of relationships" (De Quincey, 2000, p. 139). This description reflects something of the profound level of engagement and interaction that is characteristic of the dynamic nature of participatory learning spaces as reflected in the findings of this study. The data reveal that when participants in the spiritual direction course operate with a shared purpose of contributing to each other's learning, they experience a deepening, broadening, integrating and expanding of their own learning experience.

The key elements of the interactive aspects of participatory learning space identified in the findings include the deepening appreciation for the involvement of peers in the learning process. This was expressed in terms of valuing the participation of others in their interactions within the various learning group situations particularly the small group interactions. The sharing of experiences and the two way dialogue that occurs in this approach is appreciated as a resource both for extending awareness of the breadth of experiences and in providing a range of personal perspectives from peers and formators in describing these experiences. This approach extends beyond knowledge acquisition to promote deepening awareness of the various dimensions and perceptions of what is occurring within the relational and personal dynamics of group interactions.

4.2.4 Overview of the impact of relationships on learning.

The discussion of category 1 has focused on the range of perspectives that contribute to the learning processes within the spiritual direction course. The collegial, interactive approach to learning contributes to a collective engagement in which participants relate to each other within the shared learning space. The participants' active role in contributing to the learning process extends and enriches learning by relating their experiences more directly to the learning processes.

The collegial, interactive approach to learning has been identified by the researcher as a pivotal approach that links and supports the exploration of a wide range of experiences and insights shared by participants in the learning space. To maximize the benefits of this approach within the spiritual direction formation program, certain qualities of relationship are recognized as constructively influencing the learning experience for participants. They include trust, openness, integrity and vulnerability in the way participants engage with each other in the learning space. By applying these qualities within the learning process there is a subsequent deepening, broadening, integrating and expanding of the learning space between the participants.

As well as the relational qualities associated with the collegial, interactive approach, the nature of the interactions between participants influences the manner in which they engage within the learning space. A focus on the communal interchange of experiences and insights within the learning space promotes a valuing of the contributions of others and an honouring of the shared environment in which the learning occurred. As a result, the learning space becomes a participatory learning space that is dynamic in nature in that it invites participants to engage both in affirming and challenging each other in the learning process.

The study contributes empirical evidence to identify the significance of the collegial, interactive approach to learning based on participants' relational qualities of trust, openness, integrity and vulnerability. These qualities contribute to enhancing the learning space.

4.3 Category 2: Contemplative Processes of Learning

Having considered the formational approaches to learning, this section reports the findings on the contemplative aspects that inform the learning processes within the spiritual direction course. The course was developed around a contemplative approach to learning which relies on a reflective approach to formation of spiritual directors (AECSD, 2015; Truscott, 2007). Contemplative processes of learning refer to the application of meditative and reflective practices to promote awareness and insights based on engagement with individual and group experiences (Brady, 2007; Duerr, Zajonc & Dana, 2003; Hart, 2004; Seidel, 2006). In light of the discussion about the impact of collegial, interactive or intersubjective approaches to learning in the previous section, the relationship between these approaches and contemplative processes of learning has been the subject of scholarly discussion (Gunnlaugson, 2009). Gunnlaugson (2009) raised the question of how contemplative processes could work in conjunction with collegial, interactive engagement to

promote adult learning outcomes. This section of the findings responds to this question by drawing on the firsthand experiences of participants engaged in a contemplative approach to spiritual direction formation.

The participants reported that they grew as spiritual directors when they were engaged in examining experiences through a range of reflective processes. These processes involved engagement with experiences both within and beyond the course as part of the contemplative process of learning. Four specific aspects of the contemplative process of learning have been identified as contributing to the participants' processing their experiences. These aspects include: time to reflect and contemplate; dimensions of experiences; critical processing of emerging insights; and integration of insights into new experiences. As part of the contemplative process of learning, they are explored in the following sections of this chapter and are presented in Figure 4.3.

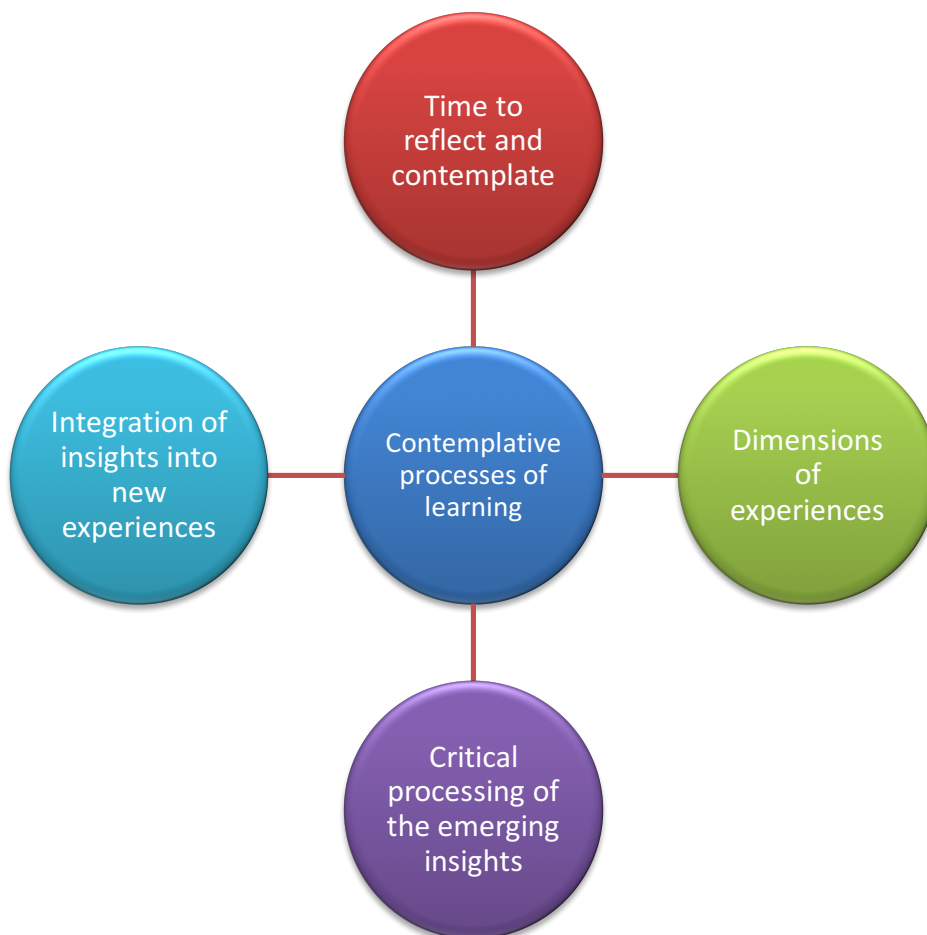


Figure 4.2. *Factors that influence contemplative processes of learning.*

4.3.1 Time to reflect and contemplate.

Time to reflect and contemplate was perceived by participants as a significant aspect of the contemplative process used in the spiritual direction course. Participants appreciated time to reflect and contemplate in relation to four activities: time to notice; time to reflect using the principles of *Lectio Divina*; time to process learning at the conclusion of teaching sessions; and time to write reflective journals. Each of these aspects is explored in the following sections.

4.3.1.1 Time to notice.

The concept of time to notice was reflected in various forms when participants engaged in the contemplative process of learning. They included; provision of time, the role of silence and stillness, trusting the process, letting go of agendas and open-minded approach to reflection. Each of these aspects are explored in this section

The contemplative process associated with this spiritual direction program required the participants to know and understand the relevance of time to notice. For some participants, this was reflected in their perceptions regarding the provision of time. Many had experienced previous adult learning contexts where the demands of their respective programs did not allow for time to notice.

Structuring time in the spiritual direction course enabled participants to critically reflect not only on the content of the course but also to contemplate on its relevance to their emerging professional and personal growth as a spiritual director. The transition to a slower pace was a contrast for participants who were used to tighter time frames and time based learning outcomes. The following insights reflected the type of growth commonly perceived by the participants involved in this study. “With the time in between sessions, I did not have to rush things. I had time to reflect and to understand the contemplative way of spiritual direction. This enabled me to assimilate things more fully and digest it well” (H13). The adoption of contemplative practices, by participants, results in them taking time to slow down and reflect on what they were learning. These aspects contribute to deepening the learning process. These opportunities to slow down provide time to integrate their experiences particularly with the teaching content as part of their personal learning.

The focus on silence and stillness as well as slowing down was significant in assisting participants to relate their learning in the course to their practice as spiritual directors and

their personal self-identity. The availability of time and space was pivotal for participants to enable exploration and deepening of their self-identity. The timing of the course, with its reflective and reflexive agendas, contributed to a growing awareness of the impact of self-identity on the practice of spiritual direction as echoed in this statement.

The quiet, the silence, the stillness and slowing down was grounding our learning times and also encouraging those practices in our lives. This grew in importance for me in my own life and my own growth. It was the dovetailing that was important for me in working and being with people in spiritual direction and in our learning. The learning became very personal because there were spaces to reflect rather than having a volume of information. The contemplative reflective strategy was very helpful in applying, grounding and deepening the learning as it was different for each of us. We took away what was relevant to what we needed to learn or notice. (I13)

The quiet and slow approach provides opportunities for the participants to integrate various aspects relating to life with their individual understanding and awareness of the practice of spiritual direction. This enables links to be made between the awareness of their identities and what they are becoming in their formation as spiritual directors through contemplating on their learning experiences.

Trusting the process required participants to believe that taking *time to notice* will contribute to their learning. This was a significant challenge for participants from professional and personal backgrounds driven by heavy schedules and time demands. Programs based on contemplative processes of learning, that incorporate time to reflect and slow down, often seemed strange to students in the early stages of the course. They were not used to the availability of extended time to critically reflect and notice. A key aspect of the contemplative approach required the participants to trust the process of reflecting on their life experiences (Hart, 2009). This level of trust was reflected in their preparedness to slow down and critically reflect on their current life experiences. The transition toward trusting the process impacted participants' learning both personally and vocationally as the following comment suggests.

The contemplative way was so different and it was a lot more about trusting where I was in life. I know it is going to keep growing hopefully but it was about being present to where I am now and what is happening for me now. I am still not very good at

listening to all those movements but I know how important it was and I desire to do it. It was that way of being that was not rushed where often in the past I was striving to do things instead of waiting to let things unfold which was modelled so much in the formation program. (D07)

As the participants grow in confidence in their ability to trust the process, they become more alert to some of the more subtle and subconscious aspects of their learning. The participants' reference to movements shows an awareness of shifts and changes in themselves and others that are significant to their learning and development as spiritual directors.

Another aspect of the contemplative process of learning reflected in the data was the willingness of participants to wait for learning to emerge out of the process. When participants let go of their personal agendas, they more readily became aware that contemplatively taking time to notice promoted the emergence of understanding. By letting go of their influence on the contemplative process, participants experienced an elevation of their physical body awareness and an enhanced feeling of being alive when they emerged from the process. The need to let go of agendas and presumptions was highlighted in the following account of what it was like to engage in contemplative prayer or reflection.

I came out of contemplative prayer different because it quietens me down and allows me time to pay attention to all my senses and gradually let go by doing nothing but receiving. I physically allowed my body to let go to be in the present. When I was able to let go, the senses were heightened. There was that sense of total letting go and of aliveness when you came out. My whole self became totally involved in it because the sacred space was created in sharing time together. It mimics the space and time with our own directees. (R13)

The contemplative approach is one in which participants become fully immersed as a result of having a dedicated space in which to share the experience with others. This contributes to making the links between these experiences of contemplative engagement within spiritual direction sessions with directees.

The contemplative approach also involved an open-minded approach to reflection that took into consideration the breadth of life experiences and relationships. When participants approached the learning process from a contemplative stance, the process involved them in letting go of preconceived ideas. By avoiding pre-judging experiences in dualistic terms,

participants were able to assess the significance of what they were encountering in more holistic terms that related to their practice of spiritual direction. This was reflected in the comments made about the contemplative gaze (Pitchford, 2014) or stance of the participants.

The contemplative gaze, rather than being dualistic; black and white, right and wrong, or good and bad, encouraged a more open hearted response, involving all of us, and hopefully role modelling for our directees. This was very empowering. The approach was about holding back on the judgement, staying still and being alert and not judging everything as right or wrong. It was about looking at what was going on in me, the other or the world and waiting to see what else could be there. (K10)

Openness to notice situations results when participants suspend judgement on the significance or value of particular outcomes or elements of experiences. They experience this as an affirming experience that contributes to them being able to focus more intently on what is happening in themselves, others and the broader context of life. As well as noticing what is happening within and beyond them, they become aware of what is emerging as new insights as a result of the process of being still and waiting.

In conjunction with taking time to slow down, participants also experienced the contemplative approach through the *Lectio Divina* practice that guided their processing of learning. The influence of applying the principles of *Lectio Divina* is explored in the next section of the findings.

4.3.1.2 Appreciating the principles of Lectio Divina.

Another aspect of this particular contemplative approach that assisted participants was their engagement with the practice of *Lectio Divina* (Binz, 2008; Hall, 1988). This practice, as outlined in the literature review, provided participants with a framework to guide their reflective processing of practical and theoretical sessions. Two aspects of the practice were identified as contributing to the participants' experience of contemplative education. They were: provision of a simple, connected structure for learning; and assistance in slowing down and noticing.

The simple, structured approach of the *Lectio Divina* practice enabled participants to readily apply it to what they were reading, writing and experiencing in the spiritual direction course. In applying the principles of *Lectio Divina*, participants experienced a connection

with what they were personally encountering. The application of this practice to what they were noticing in the learning process is illustrated in the following account.

Lectio Divina was a revelation to me. It seems so simple and obvious. I was learning about *Lectio Divina* and letting things speak to me while letting everything else go that didn't matter. I felt there was a real parallel between *Lectio Divina* and writing papers. I was writing about what touched me in relation to texts I had read and that was liberating as well and life giving. There was a freedom to be real about a text. (C12)

The principles of *Lectio Divina* provide a framework that contributes to participants noticing significant aspects that are relevant to their learning and letting go what is irrelevant. This contributes to participants experiencing freedom in expressing what is emerging for them in their learning and writing.

The *Lectio Divina* approach also contributes to assisting participants to slow down and notice what they are experiencing as outlined in the next section. By applying the principles of *Lectio Divina* within the contemplative approach, the participants' slowed down and noticed several dimensions of what was occurring for them. The principles of the *Lectio Divina* practices were helpful in creating opportunities to take time to stop and reflect deeply on both their life circumstances and the impact these had on their lived experiences. Practices associated with the *Lectio Divina* approach were also evident in participants' growing awareness of various dimensions of their learning experiences. This contributed to developing awareness of what was emerging from participants' learning as expressed in these comments.

By practising meditation, I learned to slow my system down which had a physical impact in that my blood pressure came down. I also learned to stop and sit with God and that is foundational to spiritual direction. Then there was *Lectio Divina* which I am trying to go through now. It had the same impact in that it enabled me to stop and sit and listen. I was able to get value out of *Lectio Divina*. (S13)

The *Lectio Divina* framework provides a structure within their learning processes to guide participants in slowing down to pay attention to personal and transpersonal elements of their experiences. This contributes to them reflecting more deeply on what they notice which heightens their awareness of the value of the process to their learning and practice.

The principles of *Lectio Divina* provide a simple and practical guide for engaging in contemplative processes of learning. The practices associated with *Lectio Divina* enable participants to take time to slow down, be quiet and notice what they are experiencing as part of the learning processes in the spiritual direction course. Another opportunity to slow down and notice was created by factoring in time for reflection at the end of teaching sessions.

4.3.1.3 Processing learning at the conclusion of teaching sessions.

The contemplative approach to reflecting during and at the completion of sessions contributed to participants engaging more directly and personally with the curriculum content. Time was structured into the program, at the end of lectures and practical segments, to enable participants to reflect silently on what had been raised during these sessions. This provided time for participants to identify the relevance of these sessions to their own learning about the practice of spiritual direction. This was illustrated in the following comment. “One of the wonderful changes in the format was the amount of time that was dedicated to quiet reflection. This gave you space to go away after sessions and just contemplate what you had learned and ground it” (J13).

Structuring in time to contemplate on what occurs in sessions assists participants in personalising their learning in relation to the group experiences. This also supports their endeavours to apply the curriculum content more directly to their own formation as spiritual directors. As well as these opportunities to slow down and notice course content, participants were expected to produce written accounts of their learning experiences as part of the contemplative approach.

4.3.1.4 Writing reflective reports.

Another activity that utilized time to slow down as part of the contemplative approach was to include openings for reflective writing. The writing occurred in personal journals and verbatim reports pertaining to spiritual direction sessions and assignments. These different forms of writing assisted the participants in their ability to critically reflect on their personal experiences, practical sessions and lectures. These avenues for reflective writing helped participants to become aware of several aspects of their contemplative process of learning including awareness of their ability to reflect on previous experiences, and deepening awareness by slowing down to write.

Written reflections promoted awareness about what may have been overlooked during the lectures or spiritual direction practical sessions. Structuring opportunities for participants to take time to think about and write down their reflections about a session contributed to assisting them to identify aspects in the learning process that may have been overlooked. The participants' experience of writing up verbatim reports after practical fieldwork sessions provided some insight into the impact of this form of writing on learning as observed in the following example.

On the spot you can't think and it was only later with opportunities to reflect that you realised what you should have done. Writing it down was invaluable. It was like revisiting the session. I realised the significance of what had happened and the things I didn't pick up at the time. (B11)

The process of applying contemplative approaches through reflective writing encourages participants to intentionally review what had occurred in practical sessions away from the actual encounter. This extends learning beyond the formal curriculum process to what participants are experiencing elsewhere in their personal lives and their practice as spiritual directors.

The contemplative practice of journaling is a way of organizing time to reflect on personal experiences within and beyond the formal learning process. The use of journaling aids participants in their ability to grasp the interplay between the various dimensions of experience. By writing their reflections, the participants are able to identify aspects of their self-awareness and learning that may have previously been processed only superficially. The writing of journals extends intentional reflection beyond the formal learning contexts into periods beyond the immediate experiences.

The written accounts of participants' encounters deepened their awareness of the significance of reflective contemplative approaches, such as journaling, in recalling the breadth and depth of what they had experienced. This contributed to deepening participants' understanding and practice of spiritual direction through critical self-reflection in written form as expressed in this comment. "I think the journals took me out of my head and to a deeper awareness of what happens and doesn't happen in everyday life. It highlighted the importance of reflecting rather than just rushing through" (E12). Journal writing is a significant way of taking time to intentionally reflect on learning experiences and practical sessions subsequent to the events. By writing down their reflections, participants learn to

revisit experiences and notice aspects that may have been overlooked or were unexpected outcomes.

This section has explored the time to reflect and contemplate and highlights the significance of slowing down, applying structured approaches like *Lectio Divina*, reflecting after formal learning sessions and writing reports in the learning processes of participants. Another aspect of the contemplative processes of learning relates to the deepening awareness of the range of dimensions of experience that emerge when participants take time to contemplatively reflect on their learning experiences.

4.3.2 Dimensions of experience.

When participants reflected deeply as part of their contemplative process of learning, various dimensions of their experiences emerged as significant aspects of their learning. As outlined in Chapter 2, these dimensions of experience include: affective (Morgan, 2013); intuitive (Schön & DeSanctis, 1986); sensate (Knapp, 2010); and cognitive (Grossman, 2009) elements. Participants reported awareness of these elements was integral to their understanding and practice of spiritual direction. Two aspects of contemplative approaches that contributed to the learning process were: awareness of the dimensions of experience; and avenues of expression. These aspects of the learning process are explored in the following sections.

4.3.2.1 Awareness of the dimensions of experience.

Affective, intuitive, cognitive and sensate dimensions of experience were identified by participants as providing additional scope for exploration and reflection in contemplative processes of learning. The participants' awareness of these dimensions promoted a broader perspective that contributed to a more holistic view of their experiences. The shift in awareness in participants was a result of reflecting on particular aspects of their experience. By engaging in contemplative approaches to processing practical sessions, participants became conscious of feelings and sensations associated with affective and sensate dimensions of experience they had previously overlooked or avoided. This was highlighted in a comment that described some of the interactions within small group sessions, or triads, which involved participants adopting particular roles in spiritual direction practical encounters.

What really stands out, when we were doing triads, was the way J asked me what I felt and kept pursuing me. She did not let me off the hook. I got to the point where I was really feeling what I was talking about. This was a deeper level of awareness. It was a core feeling. The awareness of my body was also really important. My connection to my gut and my heart space was a real turning point for me. It was linked to a time when I was in spiritual direction with my own spiritual director. (C12)

Engagement with the affective and sensate dimensions of experience extends the depth of participant's learning beyond just the acquisition of knowledge content. By noticing the various dimensions of experience, participants are able to assimilate the awareness of these experiences with their own spiritual direction encounters.

Awareness of additional intuitive and cognitive dimensions of experience was also evident in a learning situation in which there was interplay between them. The engagement with intuitive aspects of participants' experiences triggered their awareness of cognitive processing of the affective dimensions. This echoed key elements of spiritual direction practice and promoted deeper awareness of the significance of reflecting on experiences in the course as illustrated in the following comment. "Something triggered in you and you looked at your subconscious to see your intuitive response. You started thinking through what feelings had been raised in you and it tapped into what happened or was triggered. It was all about self-learning" (B11).

The interplay between the intuitive, cognitive and affective aspects of experience promotes a deeper and broader awareness of personal dynamics. These dynamics involve subconscious processing of experiences through intentionally taking time to become aware of the range of dimensions within experiences.

The participants' contemplative engagement with the various dimensions of experience influences expansion of their personal perspectives. This promotes a more integrated and holistic engagement with their experiences. By acknowledging the range of dimensions in experiences, participants are able to embrace the integration of these new perspectives. As a result, they are able to notice the interplay between the various dimensions. The insights that emerge from the learning experience are assimilated into participants' understanding and practice of spiritual direction. This leads to the need to find appropriate ways of expressing all that they are experiencing.

4.3.2.2 Avenues of expression.

Having an awareness of the range of dimensions that constitute experience, alternative avenues of expression are required to assist participants in articulating what they are experiencing. “Expression” refers to the manner in which participants use various means such as metaphor (Priestley, 2005; Tisdell, 2008), storytelling (Ruffing, 2011), and images (Hart, 2004) to communicate what they are learning. The use of alternative means of expression contributes to the contemplative process of learning in two ways: construction of personal meaning; and contributions to corporate understanding of experiences.

The diverse modes of expression in the course provided opportunities for participants to explore new ways of conveying their experiences. Metaphor, images and music provided alternative ways of giving expression to experiences that were difficult to describe in rational, verbal terms. This assisted participants to give voice to the various dimensions of experience encountered as reflected in the following statement.

Some of the ways, like using images and metaphor, were a new way to learn. It was appreciating a different way and tapping into a deeper part of me. Words tend to be more head focused for me whereas metaphors, images and music helped to take it to another level. They tend to engage the heart and the inner which mirrors what spiritual direction is all about. (E12)

Articulating experiences through the use of a range of modes of expression results in more holistic communication of experiences and insights that contribute to clarifying what has occurred for participants. The various avenues of expression enhanced their ability to share the experiences with their peers and formators.

Various forms of creative expression were engaged by participants to convey what they were experiencing to others in the spiritual direction course. Participants perceived that they could express aspects of their understanding of their experiences in ways that were not limited by language-based cognitive constructs or cultural perspectives. This extended the means of communicating personal perceptions of what participants were experiencing beyond the standard prose avenues of rational expression. This is illustrated in comments made in relation to the variety of ways participants’ presented within the spiritual direction course, as exemplified by the following.

There were other ways of doing it like the use of a song at the beginning or having the big artwork. When I brought an artwork that fitted in with that theme, it was allowing for people from more oral cultures to respond and not just the Western culture. Even from a mono-cultural western perspective, we are all poets and artists so I would like to see more of that. (G08)

The use of a broader range of expression, within the contemplative approach, contributes to a learning process that enables participants to engage in making sense of intrapersonal dimensions of their experiences. This also enables participants to more readily convey their perceptions of experiences to their colleagues in the learning process.

Having noticed dimensions of their experiences and communicating them through a range of expressive means, participants were also able to engage in critically processing what emerged as part of the contemplative process of learning.

4.3.3 Critical processing of emerging insights.

Before reporting the findings about processing insights, it is necessary to explain a particular activity that all participants engaged in within the spiritual direction course. The involvement of participants in small group practical sessions, referred to as triads or quads, provides participants with an opportunity to critically reflect and feed back to each other. The process is aimed at developing each participant's critical self-awareness of what it means to be a spiritual direction practitioner.

The participants are allocated a role of spiritual director, directee or observer in the triad or quad groups. They engage in their allotted role in a real life spiritual direction session. The allocated director for the session guides the nominated directee. The remaining participants join the supervisor as observers to witness what occurs in the session. The participant in the role of director is the prime recipient of the critical feedback during the sessions. All members of a group are invited to provide feedback and critique the way the student director engages with the directee in the spiritual direction session.

The contemplative process of learning involves the critical analysis of participants' perceptions of their insights from reflecting on, processing and expressing their experiences. This incorporates critical feedback and group dialogue that assisted participants, in conjunction with their colleagues, to engage in in-depth learning (Biggs, 2003). In an adult context, in-depth learning is described as learning that focuses not just on the substance but

also on the substrates of meaning that may not be immediately apparent (Laird, Shoup & Kuh, 2005).

Participants experienced the critical feedback with a sense of personal vulnerability and challenge. However they came to see it as an indispensable part of their learning process in that it gave them opportunities to be tested in their practice and self-awareness. The interactive learning situation in triad or quad groups, described at the start of this section, was beneficial in providing participants with an occasion to be challenged and critiqued by their peers as highlighted in the following comment.

I experienced entering the triad group sessions with fear and trepidation. I was never quite sure which the hardest role was. They were very valuable as I experienced it and certainly very intense. I also had the sense that they were very critical. It felt to me like this was where the rubber hits the road. It was a terrific place to test oneself and to become comfortable in that place. (N07)

The critical feedback provides participants with other perspectives and insights in relation to real situations in which they will be invited to apply themselves as spiritual directors. In gaining critical feedback from peers, participants develop an awareness of both their abilities within the roles and how the practical experience leaves them feeling about their engagement with the process.

One of the key focuses of critical processing of spiritual direction sessions was related to developing self-awareness in the student director. By reflexively becoming aware of the significance of this feedback process, participants were able to notice what was influencing their inner responses to the session. The feedback distinguished between how they performed and their self-awareness as they performed. Self-awareness of performance contributed to deepening participants' critical self-awareness of the motivational and affective aspects that influenced their responses in a range of situations. The following insight exemplifies a general perception shared by other participants emanating from these experiences.

What I experienced with the triads was a feeling that you were being exposed to the people sitting behind you. I was going to be assessed by the other people in the room – my directee and the observers. As much as I wanted to avoid it, I got a lot out of the session. How the supervisor gave us feedback was crucial to the triads. The question throughout that evaluation time was never an assessment of how good I was or how

well I had done. The assessment was focused on what was happening in me while I was in the spiritual direction triad and that was where the value was for me. (H13)

The contemplative process of learning employed within the spiritual direction course focusses on developing critical self-awareness to promote participants' mastery of spiritual direction practice. Narayan & Steele-Johnson (2007) assert there is a distinction between performance and mastery in vocational training situations. They say "performance" focuses on critically comparing participants' practice against a set measure or other students and "mastery" describes the process of acquiring skills and awareness that enables participants to critically ascertain whether they are carrying out the task in line with commonly agreed criteria. The focus on mastery through critical self-awareness emphasized the need of personal motivation for participants to learn from the critical feedback.

As well as learning from their own experience of being the student director, participants said they learnt to self-assess through the critical feedback in general whether it was directed to them or to others in the group. The involvement in group discussions after practical sessions enabled participants involved in each of the roles to learn from the experience of the allocated director in the session. The critical feedback from each member of the group contributed to extending the learning by providing a range of perspectives on the same experience. Taking turns to be involved in the various roles in triads enabled participants to experience the spiritual direction sessions from the three different perspectives: the director, the directee and the outside observer. The following comment about participation in the triad groups provides an example of how one participant reflected on her experiences.

Sometimes it was things I wasn't aware of but when it was fed back to me, it started ringing bells. Even when someone else was in the director's chair, talking about it afterwards, you picked up so much. Questions like 'what do you do when a pilgrim talks about stuff that you have issues with?' We also learned when we were in other roles apart from the director. (U11)

The data confirmed that critical feedback from various perspectives enhances the learning for all those present in the small group practical sessions. This enables each participant to contribute from the various roles and at the same time hear other members of the group share their perspectives. The contribution of subjective and objective perspectives

in the feedback within the group settings broadens the learning process based on the range of responses to the practical sessions.

The distinction between performance and personal awareness of practice assists participants' ability to learn from the critical feedback they receive in the practical sessions. The constructive and caring manner in which critical feedback is offered to participants contributes to extending their learning by enabling them to accept the feedback more readily. Their learning is also extended by having opportunity to hear direct feedback from their directees in the spiritual direction practice sessions and to hear feedback directed towards other participants. This also provides multiple opportunities and perspectives to enable learning from what is offered by those in the different roles and to offer critical feedback from their own perspective.

The critical feedback flowing from taking time to reflect and contemplate the various dimensions of experience provided a rich array of information and insights that needed to be integrated into participants' responses to new experiences. This aspect of the findings is discussed in the following section.

4.3.4 Integration of insights into awareness of new experiences.

Participants were conscious that their learning deepened when they recognized what they had taken in at a particular time had become integrated into their awareness over time. This integration was noticed in three spheres of their ongoing learning: integration in personal awareness and understanding; integration across various dimensions of learning; and integration in the practice of spiritual direction. These aspects of integration will be discussed in the following sections.

4.3.4.1 Integration in personal awareness and understanding.

When reflecting on what they had learnt, participants discovered that they had integrated significant amounts of content without realising how much they had absorbed. The insights that emerged from curriculum content and practical sessions were assimilated into their learning when participants were able to apply them in their life situations. The integration occurred when they engaged in writing about what they had learnt in the assigned essays and related it to what they were reading. It was further integrated when participants applied their personal insights to the various aspects of their experience and practice as

spiritual directors. An example of the integration of curriculum content over time is reflected in this comment.

You read books and journals and try and come up with some synthesis. These are good exercises but when I wrote the essays for unit one and two, there was an intersection between my life, my spiritual life and my practice as a spiritual director as well as my learning. These sorts of essays were what I called integration. Knowledge was not separate from what I do and how I live. It was a living knowledge. (H13)

The writing of essays contributes to the integration of the subjective and objective perspectives applied to the individual participant's processing of experiences within the course. By consciously processing the learning experiences through written assignments, participants become aware of how the various aspects of their lived experience intersect to inform their practice as spiritual directors. This process transforms participants' perspectives on the integral nature of all experiences in forming a dynamic understanding of what they are learning.

As well as integrating insights from the course into practical and personal understanding of spiritual direction, participants felt that the integration occurred across various dimensions of their learning.

4.3.4.2 Integration across various dimensions of learning.

The various dimensions of learning mentioned by participants include the cognitive, personal and spiritual aspects of what was experienced in the learning process. Each contributes to participants' integration at different levels and facets of awareness. While it is difficult to measure the effect of affective and spiritual aspects of experience, the data support the view that participants were impacted by their developing awareness of these aspects of their experiences. The process of integration extended and deepened the progression and outcomes of their learning. Their engagement with the process highlighted awareness of the diverse nature of the experiences that participants were initiated into through the learning processes within the spiritual direction course. The following comment provides an example of the integration that occurred in the spiritual direction course.

There was so much reflective learning and growth which were all part of the learning. It was something that did not happen overnight. So it was not just about getting a concept

in your head and having it sorted out at the next session. It was that there were layers of processing things and integrating them because it is about deep things of personal life and beliefs and spirituality. It's not just about the head knowledge or learning something by rote. (I13)

By integrating the various dimensions of learning, participants experience a more holistic engagement with their experiences in their ongoing development as spiritual directors. This is reflected in the integrated collegial group approach that invites various individual and group perspectives into conversation with each other. This approach acknowledges both the objective perspectives of head knowledge and the more subjective elements of personal life experiences and belief systems. These processes of integration contributed to the integration of experiences into participants' practice of spiritual direction.

4.3.4.3 Integration in the practice of spiritual direction.

The participants reported that they integrated specific aspects of what they were learning into their practice of spiritual direction. As participants integrated the theory and insights gained in the course with their practice of spiritual direction, some became aware of new insights emerging in the process which further extended their learning. Participants also developed the ability to discern what was occurring in conversations with directees. The ability to discern shifts in the various dimensions of experience within the conversation contributed to further integration of the various perspectives present in the spiritual direction sessions. This is illustrated by a comment relating to developing listening skills in the practice of spiritual direction.

The first thing I became aware of was the honing and developing of listening skills from a different perspective. The practice and immediate integration of the listening skills, by applying them to listening below the conversation, was a significant and informative tool in the process. What developed was the ability to ask the right question. The ability to sift the conversation developed so that it became deliberate and focused in its intent. (O07)

By applying their listening or discerning skills to what was happening in the directee, participants become aware of what they describe as *listening below the conversation*. This highlights the need for awareness of the other dimensions of experience that extend beyond

the cognitive processing of what is said by the directee. As a result of integrating what they learn from *listening below the conversation*, participants develop an awareness of other aspects of their practice that relate to the questions they could ask in response to what they are noticing.

Participants' learning experiences extended beyond the classroom components of the course. They included awareness of how their application of spiritual direction integrated with other aspects of their lived experience, worldviews and spiritual understanding. This contributed to a broadening awareness of how spiritual direction was conceived and applied within participants' own personal experience and practice. By integrating new insights into their practice, participants noticed new developments in their learning that often took them by surprise as indicated by this statement.

Some parts you did not expect. Somewhere along the line I had started formulating spiritual direction as part of the healing ministry. It was the integration that was so important for me to see happening. As spiritual directors, we are acting as healing agents. We are assisting people's growth into wholeness. (U11)

By integrating their worldviews with what they were learning in the spiritual direction course, participants' perspectives are expanded and their learning enhanced to embrace new insights that relate to their particular perspectives in a more holistic manner. They are able to articulate their learning in terms related to their own worldviews that assist them to incorporate their insights into their practice as spiritual directors.

4.3.5 Overview of contemplative processes in learning.

When the participants take time to slow down and engage with the contemplative process of learning, deeper awareness is fostered and curriculum content is integrated into their practice as spiritual directors. By applying the principles of *Lectio Divina*, participants become aware of how the practices associated with this approach assist them in deepening their awareness of what they are experiencing across a range of contexts. Creating space within the curriculum after lectures and practical sessions, allows for structured opportunities in which participants can relate the curriculum content to their self-awareness and practice of spiritual direction. The use of reflective writing and journaling extends learning by assisting participants to prioritize ongoing reflection and exploration of experiences.

The participants' engagement with the various dimensions of experience influences expansion of their personal perspectives by promoting a more integrated and holistic engagement with their experiences. By acknowledging the range of dimensions in experiences, participants are able to embrace the expanding new perspectives that arise from the interplay between the various dimensions. They are also able to assimilate the insights that evolved into their experience and practice as spiritual directors. The use of a broader range of expressive resources contributes to a learning process in which participants engage in multi-dimensional forms of communication relating to the intrapersonal dimensions of their experiences. This process fosters a deeper sense of awareness in relation to what participants were experiencing.

Making the distinction between performance and personal awareness of practice assists participants to learn from the critical feedback they receive in the practical sessions. Their learning is also extended by having opportunity to hear direct feedback from their directees in the spiritual direction practice sessions and to hear feedback targeted towards other participants. This also provides multiple opportunities and perspectives to assist learning from what is offered by those in the different roles and to offer critical feedback from their own perspective.

Critical feedback from formators and peers participating in the curriculum program is also required as part of the contemplative process to contribute to the rigor of the formation process. This aspect is significant in that it adds another dimension to the contemplative approach that challenges the learners' individual reasoning. In so doing it has the potential to foster a deeper awareness of the participants' personal and relational qualities and their relevance to the practice of spiritual direction.

The integration of the participants' insights through group engagement with their evolving experiences results in deepening their learning. By intentionally integrating the range of perspectives, participants' experience a more holistic engagement of their experiences with their ongoing development as spiritual directors. When participants integrate their insights into their practice as spiritual directors, they become aware of new aspects of learning that emerge from their experiences. This extends their learning about particular elements of spiritual direction practice and contributes to a broadening of their awareness.

Engagement in the spiritual direction course was enhanced through a particular contemplative process of learning. This process requires the provision of opportunities to critically reflect (Hattie and Timperley, 2007) on the curriculum content and experiences within the course. This contemplative approach incorporates a dynamic interplay between the cognitive (Grossman, 2009), affective (Morgan, 2013), intuitive (Schon & DeSanctis, 1986), sensate (Knapp, 2010) and spiritual (de Souza, 2012) dimensions of experience.

The emerging theoretical insight described above regarding contemplative approaches to experiential learning will be discussed in the following section in the light of the existing body of literature informing this study.

4.4 Discussion of Category 2: Contemplative Processes of Learning

This section discusses various aspects of the findings in relation to contemplative processes of learning (Brady, 2007; Duerr, Zajonc & Dana, 2003; Gunnlaugson, 2009; Hart, 2004; Seidel, 2006). Contemplative processes of learning have some common elements that are associated with other experiential approaches to learning (Eriksen, 2012; Kolb, 1984; Scharmer, 2009). Each approach has features of reflection on experiences, processing these reflections through analysis or deepening awareness, conceptualizing the insights that emerge from the process and applying them to new experiences. The questions that arise in seeking to compare and contrast these approaches relate to how they apply to particular learning situations.

The findings revealed that participants identified several core elements of the contemplative process of learning that were influential in shaping their learning. They include the quality and intention of reflective time, awareness of dimensions of experiences, critical feedback and analysis and the integration of analytic and reflective elements of the learning process. These aspects of the findings are discussed to identify their influence on participants' learning to be spiritual directors.

4.4.1 The quality and intention of reflective time.

One of the key insights that emerge from the findings relates to the provision of time for reflection and contemplation. The slower pace of the learning process enables participants to avoid feeling rushed in processing their experiences. The significance participants place on time relates to the intentional use of time for reflection and contemplation within the process of learning rather than talking about the overall duration of formation (Hartman & Darab,

2012). Emphasis has been given to targeted time structures within the learning processes that allow for reflection and analysis of the experiences (Payne & Wattchow, 2008). Taking time to reflect on practice and theory assists participants in developing skills of self-awareness and reflective processing that relate to their practice of spiritual direction.

The effect of allowing time and space between encounters accords with studies that relate to “slow pedagogy” (Hartman & Darab, 2012; Payne & Wattchow, 2008; Swirski & Simpson, 2012). These studies argue for a slower pace of higher education approaches to learning. As Payne & Wattchow (2008) contend, slow pedagogy enables students and participants to access the range of personal, social, sensate and temporal perspectives of their lived and learned experiences. However, there is a distinction between the overall pace of the course and the manner in which the time is used to intentionally engage with specific experiences within the learning process.

Participants spoke of the close association between practice and reflection contributing to deepening levels of engagement within the learning process. A key factor for them in the process of reflection was how much time was involved in learning what Schön (1995) refers to as the ability to “reflect-in-action” (1995, p. 30). *Reflection-in-action* refers to the ability of participants to develop a reflective practice that can be applied while involved within a situation on which the reflection is focused. The participants’ ability to reflect while engaging in a practical exercise is promoted by the inclusion of periods of silence and stillness in the middle of the exercise in which participants take time to notice what is occurring in the experiences.

The combination of silence and stillness contributes to broadening the scope of participants’ awareness of what they are encountering in the experiences from which they are seeking to learn. This resonates with Hart’s (2004) notion of the “art of pondering” (2004, p. 37) which he contends enables participants to notice the breadth of experiences and provides space to notice the paradoxes and contradictions in them. It also reflects Wong’s (2013) view that silence in the reflective processing of experience contributes to reducing the level of distraction generated by conversation, formator input or debate and allows for a more holistic awareness of experiences. Stillness reduces disruptions generated by movement and interactions while also assisting participants in becoming more aware of their bodily senses, feelings and emotions. These factors result in participants reflecting on their experiences with a quality of attention that enables them to become aware of the many subtle factors that inform their learning.

The use of silence and stillness in association with the slower pace of the course highlights the promotion of relational factors such as intra personal, interpersonal and transpersonal awareness of experiences (Gunnlaugson, 2011). The intra personal awareness refers to participants noticing their interior reactions and responses to personal encounters. Interpersonal factors describe the exterior relational aspects of participant's interactions with other parties. The transpersonal aspect of awareness relates to elements of experience that exist beyond the immediate scope of participants' encounters yet still impact or influence their processing of the experience (Hart, 2008). Having the time and reflective space to notice these aspects also enables participants to bring their interior awareness into dialogue with the exterior and transcendent elements of their experience.

The interaction between interior and exterior awareness in the contemplative process of learning is enhanced by giving time to silently reflect on all aspects of experiences. This provides opportunities for participants to notice the relationship between their inner responses and the external factors that trigger them. This goes beyond the critical self-reflexive interior processing of experience (Cunliffe, 2004) or the reflective external conceptualization that Lewin (1951) and Kolb (1984) identified in their models of experiential learning. The findings indicate that participant's learning is advanced by the intentional focus on both internal and external elements of experience. The integration of these elements emerges when time is given to deepening their awareness of their relationship to the experience. Eriksen's (2012) *Model of authentic becoming* moves in this direction while remaining a constructivist, individually focused approach to processing experiences.

The distinctive agenda of group contemplative processes of learning (Brady, 2007; Duerr, Zajonc & Dana, 2003; Gunnlaugson, 2009; Hart, 2004; Seidel, 2006) promotes silence, stillness and slowing down. The promotion of these practices enhances deeper awareness rather than focusing primarily on the development of concepts (Kolb, 1984; Lewin, 1951) or personal plans (Eriksen, 2012). While the latter outcomes do result from the process, the intention is to promote deepening awareness of the breadth of factors that exist in experiences. These factors impact both internal and external aspects of participant's learning and inform their perspectives into the future. Many of the experiential models (Dewey, 1938; Eriksen, 2012; Kolb, 1984; Lewin, 1951) seek to define and categorize aspects of experience and reduce them to their component parts. Based on the use of silence and stillness in slowing down the learning process, the group contemplative process of learning opens participants to

a broadening consciousness of experience. As the findings suggest, this approach grounds the experiences in broad ontological terms prior to engaging in epistemological reductionism.

As already discussed in the literature review, one traditional model identified in the findings as helpful in applying contemplative processes within the course is *Lectio Divina* (Binz, 2008; Hall, 1988). The *Lectio Divina* model (see Figure 2.5) proposes a two stage reflective process (Binz, 2008). This contributes to participants in the learning context taking time to slow down and notice both the breadth of experience as well as its implications for their practice. The integration of the principles of *Lectio Divina* into the learning process enables the development of frameworks that facilitate an intentional approach to reflection on experiences. Starting with the principles of the *lectio* stage, the focus of attention or listening is initially on the experience or situation as a whole (Binz, 2008). The purpose of the broad focus is to ensure that participants avoid limiting the processing of learning initially to a part of the experience while overlooking other elements that may be significant. Traditionally when applied to the reading of sacred text, the *lectio* stage involved the communal reading of the same text several times (Howard, 2012). With each reading the focus of attention gradually shifts to notice more specific aspects of the text to which the listener needs to pay attention.

When applied to the processing of experiences in the spiritual direction course, the noticing or listening involves participants focusing initially on the overall experience and gradually shifting their attention to what is emerging of significant to them. This progresses into the second stage of *Lectio Divina* which involves the practice of *meditatio* or quiet, meditative reflection on what has occurred in the learning session. Taking time to slow down and reflect in this way encourages participants to become deeply aware of the various aspects of the experience and their impact on learning (Badley & Badley, 2011). This is promoted in a way that avoids resolving the experience into concepts or strategies prior to giving full attention to the experiences. While this stage may appear similar to the second stage of Kolb's (1984) and Eriksen's (2012) models, the distinction is in the delayed intention to bring the experience to resolution either in conceptual form or story form resulting from these models respectively.

The principles of the *Lectio Divina* model suggest a suspension of the categorizing of the emerging insights. This is with the intention of them being expressed without any personal agenda within a group context to enable others to contribute their perspectives or insights. The findings highlight the impact of participants' letting go of their own agendas in

deepening their awareness of the variety of dimensions and the significance of the emerging insights that arose out of the experiences.

By noticing the emerging insights, participants are prepared for the *oratio* stage of *Lectio Divina* where expression is given to what has emerged from quietly reflecting or meditating on the experience or session. Traditionally this is expressed in the form of a prayer that encapsulates the cognitive, affective, sensate and intuitive aspects of awareness of the impact of a reading on the listener (Irvine, 2010). In the spiritual direction learning context, participants have the opportunity to express what they have noticed of significance in the various dimensions of the experience and in turn hear what others have paid attention to in their meditative reflections.

In the experiential learning context, expression of emerging awareness and insights may take the form of group discussion, critical feedback from their peers and formators, metaphorical articulation of the experience or debate about the various perceptions of what emerged. The purpose of articulating participant's views in the group context and inviting feedback is to further deepen awareness (Irvine, 2010). This enables participants to engage with the experience from a range of personal perspectives including the participant's own perspective.

Aware of the range of insights and perspectives emerging from the *oratio* stage, traditionally participants were invited to suspend their cognitive assumptions and agendas. This aspect of the process is intended to assist participants in coming with an open mind to notice what may emerge from the processing of their experiences. There is an invitation to listen beyond the scope of rational, cognitive processing of the facts to become aware of other possibilities that arise as a result of contemplating the experiences (Scharmer, 2009). This denotes the *contemplatio* stage of the *Lectio Divina* model. This stage provides another opportunity for deep reflection in silence and stillness. The process promotes awareness of new and creative understandings of what the experiences may contribute to the application of the emerging insights to future learning and practice (Flanagan, 2014).

This research study identifies the need to suspend personal agendas as a distinctive aspect of taking time to reflect after initially processing an experience through meditation and dialogue within the group. One of the significant elements emerging from the findings is the time spent reflecting with limited or no attention to any preconceived understandings or biases that may impede how an experience is processed. The data support the notion that, by

becoming aware of preconceived understandings and worldviews, participants are less likely to allow them to unduly influence their perceptions of what is learned from the experiences. This opens the process to broadening awareness of the multiplicity of factors and dimensions of experience that inform a more holistic view and contribute to a more integrated process of learning.

Participants felt they were invited to become aware of their agendas and notice the affective and emotional influences that may have impacted their processing of the learning experiences. The principles inherent in the *contemplatio* stage of *Lectio Divina* guide participants to engage in the process of reflection at a deeper level unimpeded by preconceptions and personal agendas. This approach to processing experiences and learning has resonance with the model presented by Scharmer (2009) that is designated as *Theory U* (See Figure 2.6).

The approach, outlined in the model Scharmer (2009) advocates, involves participants entering into a space where they have opportunity to engage with reality by taking an intentional approach to processing experiences. The *Theory U* model was developed in response to the need within the business world to rethink the way companies developed new approaches to future planning (Scharmer, 2009). The model resembles core elements of the *contemplatio* stage of *Lectio Divina*. The initial part of the *Theory U* model involves the suspension of presumptions about how to plan or resolve a situation. This prepares participants for entry into a state of *letting go* preconceived ideas that may inhibit the contemplative process of being open to what is referred to as *Presence*. *Presence* is described in this model as the connecting with “the Source of Inspiration, and Will” (Scharmer, 2007, p. 6) or “the deepest source of your self and will” (p. 12). Traditionally the *contemplatio* stage of *Lectio Divina* referred to the stance of a participant sitting with no agenda in the presence of the Divine or God awaiting an invitation to act or respond in some way to what emerges from the contemplation (Binz, 2008).

The findings suggest, however, that there are stages before the processes of suspending and letting go. This is where the *Lectio Divina* approach provides a clearer framework of preparation for the processes of deeper reflection experienced in the *contemplatio* stage of *Lectio Divina*. The principles associated with the first three stages of *Lectio Divina* provide a guide for participants to initially process their experiences in preparation for entering into what Scharmer (2009) referred to as the suspension of agendas. The initial stages of the *Lectio Divina* process are associated with seeking to make sense of what occurs within the

experiences. The lack of reference in *Theory U* to these initial stages of processing experiences highlights a limitation of this model (Scharmer, 2009). These initial *Lectio Divina* stages need to be taken into consideration when formulating a model that informs the learning processes in the formation of spiritual directors.

Despite this limitation, the *Theory U* model provides clearer and more structured stages for the processing of experiences than offered by the *contemplatio* stage of the *Lectio Divina* model. This is further discussed in the section on the integration of analytic and reflective elements of experience later in this category.

Another aspect of the findings that has been identified as influential in preparing to identify a theoretical framework related to the guidance of participants in their learning is accounting for the various dimensions of experience in contemplative processes of learning.

4.4.2 Awareness of dimensions of experiences.

The awareness of the various dimensions of experience encountered by participants in the learning process contributes to deepening the learning experience (Biggs, 1999; Hartman & Darab, 2012). This awareness enables participants to also acquire a more holistic perspective that assists them in refining their understanding of personal and relational factors that shape their practice of spiritual direction. Different forms of expression are also required to enable participants to describe the more subtle and subconscious elements of their experiences within the group contemplative processes.

The participants in the formation program have occasion to observe *concrete experiences* (Kolb, 1984) of spiritual direction practice within and beyond the course. They noted that these were invaluable opportunities to observe real life scenarios that can assist them in developing an understanding of how conceptually they might practice spiritual direction. However, there was also a growing awareness of the influence of other aspects of experience associated with subjective personal traits that are not directly observable in *concrete experiences* (Kolb, 1984) but influence the way spiritual directors apply their practice. They involve attributes that affect the way spiritual directors see themselves and relate to their directees.

The findings indicate that, by also noticing the range of subjective or personal dimensions of the learning experiences, participants gain insights into the relationship between the various dimensions which in turn informs their learning. This shifts the focus beyond the concrete or observable aspects of experience as proposed by Kolb (1984).

Eriksen's (2012) modified model of the experiential learning cycle did focus on the development of personal awareness as part of the "model of authentic becoming" (2012, p. 698). For Eriksen (2009, 2012), the personal traits of the participants in the learning process were as significant as the processing of specific concrete experiences. Starting with the lived experience of participants in the learning process, he proceeded to emphasize the self-reflexive processing of the various dimensions of their experiences (Cunliffe & Eriksen, 2011). This approach resonates with aspects of the development of self-awareness by accounting for the broader range of dimensions of experience as identified by participants in this study.

The participants are assisted in refining their understanding of the practice and philosophy of spiritual direction as a vocation through the processing of their *concrete experiences* (Kolb, 1984) in association with their *lived experiences* (Eriksen, 2012) of spiritual direction practical sessions and fieldwork. The development of self-awareness associated with their spiritual direction practice is broadened through engagement with the various dimensions of personal experiences. In parallel with this broadening effect of engaging with self-awareness through the *lived experience* (Eriksen, 2012) is the refining of conceptual understandings of spiritual direction practice that emerges out of the observation of *concrete experiences* (Kolb, 1984) of practical sessions. The result is that participants learn to reflect on both these aspects as part of the learning cycle in spite of the fact that one has a broadening and the other a refining orientation.

The findings of this study suggest that participants are aware of the difference between how the various dimensions of their experiences contribute in different ways to the development of their practice of spiritual direction as a vocation and their self-awareness as spiritual directors. This suggests the need for a broad approach to engagement with the learning process that enables participants to develop both vocational and personal aspects of their learning in a complimentary manner.

The question remains, however, as to the place of critical feedback and analysis in the learning process in relation to what emerges from silent meditation and contemplation. The next section of the discussion examines the role of critical feedback and analysis in the group contemplative processes of learning.

4.4.3 Critical feedback and analysis.

This study supports the view that critical feedback from peers and formators provides alternative perspectives. These perspectives challenge participants to examine their own views both in terms of their practice of spiritual direction and their personal values, worldviews and responses to life. The focus of critical feedback in the spiritual direction course is on the development of awareness of personal responses and reactions rather than just on performance within the spiritual direction encounters. This encourages participants to critically self-assess their practice within and beyond the formal learning process.

Two important themes that emerged from the findings in relation to critical feedback are: the focus of critical feedback; and the role of critical feedback in the contemplative process of learning. These themes are explored in the following sections.

4.4.3.1 Focus of critical feedback.

The insights emerging from the findings indicate that critical feedback from peers and formators raises awareness of what is happening within participants during spiritual direction sessions more than just their performance in a role. Both aspects are acknowledged as part of the process. Priority is given to the personal dynamics occurring in the sessions and their influence on the way the sessions evolve. This perspective appears to take precedence over performance.

As was mentioned previously, much has been written about the relationship between *performance and mastery* in vocational training contexts (Kolb & Kolb, 2009; McCall & Hollenbeck, 2008; Narayan & Steele-Johnson, 2007). In the process of learning focused on *performance*, challenges are seen by participants as opportunities to fail or have their competency questioned. This leads to comparisons being made between participants based on criterion predetermined by teachers or formators. In the case of *mastery*, challenges are seen as opportunities for growth and focus on skill or knowledge development which is more personally oriented.

The insights that emerged from the findings also suggest there may be a third focus of critical feedback; *personal awareness*. *Personal awareness* describes attentiveness to the inner dynamics of participants in the process of completing or carrying out a task. While *performance and mastery* relate to specific goal orientations (Narayan & Steele-Johnson, 2007) linked with skill or knowledge development, personal awareness is focused on the

personal dynamics occurring within the participant while they are performing or mastering a task or skill.

The three foci of critical feedback are not mutually exclusive but co-exist in contributing different elements to the learning process. *Performance* goal orientations provide stimulus to participants to learn within particular time frames and contexts. The role of *mastery* in the learning process contributes to participants assimilating what they are experiencing into their existing body of knowledge and skills. *Personal awareness* enables participants to notice how their personal reactions or responses in particular situations influence their process of learning, practicing and engaging with tasks within a course and beyond.

Participants were very aware of performing in front of their peers and supervisors in the process of mastering the skills and insights. The findings indicate that it is the development of *personal awareness* in association with *performance* and *mastery* that enhances participants' learning associated with their practice of spiritual direction (Cozolino, 2004). The focus on *personal awareness* in the critical feedback process contributes to learning that assists participants to acknowledge the influence of their inner emotions and motivations. This relates to how they perform and master the skills and knowledge required to practice spiritual direction (Dirkx, 2008). This finding resonates with an observation of Dirkx (2012) who states "the purpose of education is to bring out that which is within. It refers to the process by which education helps realize, in relation to the outer world, the inner qualities or make-up of the person" (2012, p. 402). This includes accounting for all the experiential dimensions noted in the previous section of affective, intuitive, cognitive, and sensate aspects of their experiences.

Challenging this position, Hattie and Timperley (2007) have argued that critical feedback focussed on the "self as a person" (2007, p. 90) is less effective in its contribution to learning compared with the other foci of feedback such as "task", "process" or "self-regulation" (p. 90). This is based on the contention that personal feedback bears little relationship to the task concepts and goal orientations that are needed to inform students understanding of how they should perform (Hattie & Timperley, 2007, p. 96). This position discounts the influence self-awareness or reflecting on how the self as a person contributes to participants' understanding as they examine various dimensions of their experiences. By engaging with the breadth of dimensions of experience as described in a previous section,

participants' self-awareness enhances their engagement with the world around them particularly in their practice as spiritual directors.

An additional observation of this study is that students' comprehension of situations is broadened when they learn to become aware of what occurs within them as well as around them. This accords with Hart's (2004) argument that the purely rational approach to examining experiences or learning tends to overlook some of the intuitive or affective elements of experience giving preference to how things appear or how they are applied. By allowing for awareness of intuitive and affective aspects to inform their perceptions of experiences, participants are able to integrate these perceptions into their analytical processing and contemplative awareness. Contemplative awareness involves opening the way for a more holistic understanding that accounts for the range of dimensions of experience.

This study supports the principles of contemplative processes of learning that aim at holistic critical engagement with inner and outer awareness of the aspects of experience including the conscious and subconscious elements of personal awareness (Dirkx, 2012). The critical feedback of peers and supervisors in inviting participants to notice their personal traits, in association with their mastery and performance, enables participants to self-reflect in a way that contributes to their personal awareness in the practice of spiritual direction. However, critical feedback also contributes a significant element to the contemplative learning process as outlined below.

4.4.3.2 The role of critical feedback in the contemplative process of learning.

The findings indicate that participants experience critical feedback as an integral part of the contemplative processes of learning. As previously discussed, critical feedback relates particularly to two stages in the contemplative processes associated with the *Lectio Divina* and *Theory U* models of learning. The first stage, in which critical feedback is applied, is associated with the *oratio* stage of *Lectio Divina* when participants are encouraged to share and critically reflect on what they have experienced. The second opportunity for critical engagement follows the *contemplatio* stage of *Lectio Divina* (Binz, 2008) or presencing stage of *Theory U* (Scharmer, 2009).

In the *oratio* stage, having initially reflected on practical sessions or verbatim reports, the communication of critical feedback assists participants to become aware of the breadth of factors that influence spiritual direction practice. By sharing their critical insights with the

group, participants and their peers are alerted to the range of perspectives and elements that require consideration in the following stages. This process is consistent with some of the other experiential models of learning (Eriksen, 2012; Kolb, 1984). In Kolb's (1984) model, the critical reflection is focused on deciphering the more objective aspects of the *concrete experience* to develop an *abstract conceptualisation* of the experience (See Figure 2.3). Eriksen (2012) invites critical reflection on the range of experiential elements in making sense of what he calls the *lived experience* prior to individuals engaging in creating their own account of what has occurred. This stage is referred to as *self-authorship* (see Figure 2.4). Following *abstract conceptualisation* and *self-authorship* respectively, Kolb (1984) and Eriksen (2012) propose moving directly to the cognitive processing of these stages with a view to moving directly to formulating strategies and plans to address future scenarios.

Like Kolb (1984) and Eriksen's (2012) models, *Lectio Divina* initially invites participants to take time to critically reflect on the experiences with a view to noticing the range of experiential dimensions emerging from the *meditatio* stage of *Lectio Divina*. The difference with this latter model is that it includes a second stage of critical reflection and engagement in the stages following the *contemplatio* stage in *Lectio Divina* and the *presencing* stage in Theory U. This is to encourage participants to engage in critically reflecting on the implications of what they are being invited to act on in the *operatio* stage (See Figure 2.5) or the *prototyping* stage of *Theory U*. The process of critical feedback is applied in these stages to enable participants to initially make sense of the experiences as a result of the reflective process of *contemplatio* in the *Lectio Divina* process. By suspending their natural inclination to directly process the insights at this stage allows space for participants to initially notice emerging themes based on critical feedback from others in the group. This occurs before they proceed to formulate conclusions about what actions they embark on as a result of the experiences they have considered. This also highlights the influence of the collective in providing critical feedback to broaden the perspective of participants in relation to what is emerging.

The study indicates that the suspension of analytical engagement until after the second stage of contemplative reflection contributes to the creation of space, both individually and corporately, for participants to pay attention to the range of dimensions of experience (Scharmer, 2009). This also allows for awareness of the various outlooks represented by the individuals in the group and the various objective and subjective perspectives to be equally accounted for in the contemplative process. In the group contemplative process, the

suspension of full analysis of experiences also allows time for participants to take into account the complexity of the variety of aspects of experiences and learning that they are invited to notice. This involves the intentional *letting go* of personal agendas and non-essential elements of the learning experience (Scharmer, 2007).

The suspension of analysis or *letting go* aspect of the process distinguishes it from the models developed by Eriksen (2012), Kolb (1984) and Lewin (1951) in that it intentionally invites participants to suspend their attempts to work out what they need to know for a time. This is characteristic of both *Lectio Divina* (Binz, 2008) and *Theory U* (Scharmer, 2007) models which call for entry into the *contemplatio* or *presencing* stage (Scharmer, 2007) unencumbered. Having embarked on this stage, participants are encouraged to be open to what Scharmer (2007) refers to as *letting come* which describes the process of contemplatively waiting in silence and stillness for what may emerge as creative insights.

Subsequent to the emergence of creative insights, participants are again invited to critically engage within the group to personally express the insights that have come to their attention. This is with a view to assessing the relevance and significance of what emerges in the *contemplatio* or *presencing* stage to their ongoing practice and personal and corporate understanding. The *Theory U* model (Scharmer, 2007) provides some further stages of processing that contribute more detail to the stated principles and processes of *Lectio Divina* (Hall, 1988).

After the *contemplatio* stage of *Lectio Divina*, the process assumes that the perceptions that flow from the critical processing of emerging insights provide enough clarity for further structured processing in the *operatio* stage (Binz, 2008). This stage generally refers to the active or operative response of the individual or community to what emerged out of the *contemplatio* stage. The *Theory U* model (Scharmer, 2007) indicates that following the critical processing of what has emerged, further processes of *enacting* and *embodying* the insights lead to stages of *crystallizing*, *prototyping* and *performing* that provide further opportunities for participants to critically reflect on the emerging outcomes.

Whether processed through either *Theory U* or *Lectio Divina*, the critical processing of each of these stages assists participants in refining their understanding and practice of spiritual direction. While the outcomes of the four models (Kolb (1984), Eriksen (2012), *Lectio Divina* (Binz, 2008), and *Theory U* (Scharmer, 2007)) may appear to be similar in ultimate goal, their processes are quite distinct. The key distinction in the *Lectio Divina* and

Theory U models relates to the provision of a second stage of reflection and critical processing that incorporate the breadth of subjective and objective aspects of the learning process. In the spiritual direction course, the findings indicate that the contemplative models of *Lectio Divina* and *Theory U* appear to fit the processes participants identified as contributing to their learning. The application of the principles and stages of *Lectio Divina* and *Theory U* models provide structured frameworks to guide the development of learning processes within the spiritual direction course.

Having identified the contribution of critical feedback to learning, the study explores how the integration of analytic and reflective elements of experience occurs within spiritual direction formation.

4.4.4 Integration of analytic and reflective elements of experience.

Participants' integrate the insights from their learning experiences with their lived experience through contemplative practices and other forms of critical reflection such as journaling and essay writing. By intentionally integrating a range of activities of learning, participants gain a more holistic engagement with experiences in their ongoing development as spiritual directors. When participants integrate their emerging insights into their practice as spiritual directors, they become aware of how these influence their practice as spiritual directors. This extends participants' learning about particular elements of spiritual direction and contributes to a broadening awareness of new and evolving experiences in their practice.

The premise, on which the process of integrating learning is based, could be linked to objectively reflecting on *concrete experiences* (Kolb, 1984) with a view to reducing experiences to identifiable elements. However the assumption underlying this approach is that these elements can inform participants' engagement with experiences as spiritual directors built on the new insights refined in the process of *abstract conceptualization* (Kolb & Kolb, 2009). For Kolb and Kolb (2005, 2009) the object of the process of experiential learning is to be able to identify an insight or strategy that could be applied to future experiences to reduce the likelihood of adverse outcomes.

Eriksen (2012) adopts a social constructionist perspective that incorporates subjective elements into the experiential learning process. He includes a range of perspectives into the processing of "lived experiences" (p. 704) that result in developing a more holistic view of the experiences. His approach to integrating these perspectives into the learning process is through inviting participants to create "personal development plans" (2012, p. 705) which

provide them with defined strategies based on their own stories or perceptions of the experiences. The resultant integration of the experiential learning process is an objective strategy that provides a set of specific options or “behaviors” (2012, p. 705) for participants to test in new situations.

The process of integration that is identified in this study does not dismiss either Kolb and Kolb’s (2005, 2009) or Eriksen’s (2012) previously outlined processes. Rather, it proposes an extension of the perceived outcomes of the experiential learning process when employed in spiritual direction formation. The nature of the vocational approach taken in spiritual direction requires spiritual directors to be able to engage with a complex and unpredictable range of experiences that cannot simply be reduced to prescriptive conceptual or strategic answers or outcomes.

This study proposes that, to maximize the benefits of engaging fully with previous and current experiences through reflective and reflexive processing, spiritual directors are encouraged to develop an *open awareness* of what they are noticing about their experiences. *Open awareness* describes the ability to notice what is being experienced without initially reducing it to concepts or strategies. This approach to awareness still accounts for the range of perspectives Eriksen (2012) identified and the various dimensions of experience that participants become aware of as part of their experience. Awareness of the breadth of dimensions in experiences is deemed to be a significant contributing factor in informing participants’ application of their learning to their spiritual direction practice.

The *open awareness* approach is identified with a contemplative approach to education where the reflective and reflexive processes are targeted at deepening awareness of experiences without specifying particular agendas (Hart, 2004). As Hart observes, “curricular demands and the emphasis on one right answer often work against depth of exploration. But pondering big and radical questions has the capacity of opening to unexpected insight” (Hart, 2004, p. 37). When spiritual directors contemplatively process what occurs internally and externally as a result of their lived experiences, they start identifying patterns that cannot necessarily be reduced to concepts or strategies. Instead, their awareness continues to expand or become more nuanced in their understanding of what is occurring and provides clues to what they need to be aware of in responding to future experiences. Some participants described it as a continuous honing process in which they developed deep and personal insights that could be described as a “living knowledge” (H13) and not just a concept in their

head (I13). This honing process results in a more integrated understanding of spiritual director's *open awareness* and their relationships with others, particularly their directees.

The integration of the various dimensions of experience both objective and subjective, cognitive and affective require an *open awareness* approach to learning reflected in the contemplative processes of learning (Brady, 2007; Duerr, Zajonc & Dana, 2003; Hart, 2004; Seidel, 2006) such as *Lectio Divina* (Binz, 2008) and Theory U (Scharmer, 2009). These approaches allow for the development of awareness of the conjunctive interrelationships that exist between various dimensions of experience that inform spiritual directors' practice. They also assist participants in accounting for the dynamic relationship that exists within situations that have been identified with the various dimensions of experience.

4.4.5 Overview of contemplative approaches to experiential learning.

The discussion of findings related to Category 2 – Contemplative Processes of Learning – highlights the significant role contemplative practices provide in allowing for quiet and reflective approaches to learning that assist participants in being formed as spiritual directors.

The discussion has specifically identified processes based on the principles of *Lectio Divina* and *Theory U* as providing the balance between deep reflective processing of the various dimensions of experiences and allowance for critical engagement at different stages in the process. A combination of *Lectio Divina* and *Theory U* approaches to processing experiences promotes awareness of the unique elements each model contributes to the learning process. The *Lectio Divina* process focuses on the preliminary aspects of encountering experiences and initially reflecting on their significance to learning. The *Theory U* approach assumes a lot in relation to the preliminary phases of processing experiences and focuses on the contemplative phase which relates to the final stages of the *Lectio Divina* process. *Theory U* extends the process beyond where *Lectio Divina* appears to finish and offers subsequent stages that provide a framework to guide participants in their reflection on what has emerged from their contemplative processing. In this sense they are complementary processes that together provide a hybrid model that map out the processing of experiences from initial encounter to practical implementation.

Chapter 5 Findings Related to Contextual Factors Contributing to Learning

5.0 Introduction

This chapter explores the contextual factors that contribute to participants' learning in the spiritual direction course. Having discussed the findings about the nature of formational learning and the contemplative processes associated with it, these next sections explore findings and literature about two contextual factors that impact the learning processes: the influence of formators on learning; and the community as learning context. The content of these categories have some overlap as they are relationally interdependent. However, they are considered separately as each category addresses issues that are contextually distinct.

5.1 Category 3: Influence of Formators on Learning

Participants reported that formators' personal attributes was a factor in how they engaged with the learning experiences of participants. The three key sub-categories identified by the researcher are associated with the manner in which the formators engaged with participants and how this impacted their learning. These are: being open and vulnerable leaders; modelling learning and practice; and engaging in co-learning. The three sub-categories are represented diagrammatically in Figure 5.1.

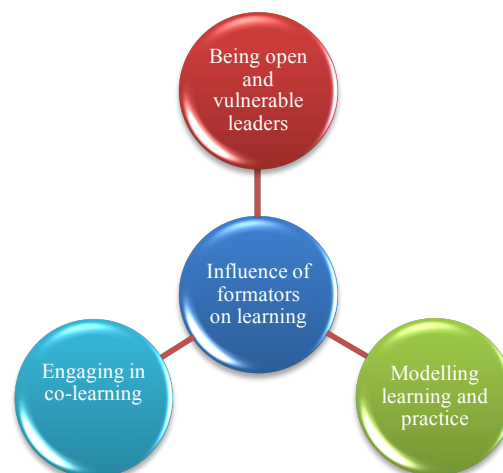


Figure 5.1. *Sub-categories of Category 3: Influence of formators on learning.*

Each of the associated sub-categories offers an insight into the influence the formators had on the participants' ability to learn.

5.1.1 Being open and vulnerable leaders.

The factors relating to the openness and vulnerability of formators are considered in the following sections to identify their impact on the participants' learning processes in the spiritual direction course. They include: engendering trust; being willing to share; embodying core values; and allowing interplay between authority and vulnerability.

5.1.1.1 Engendering trust.

Participants perceived that the formators were open and vulnerable in the way they shared their own experiences and learning. Their personal expression of openness and vulnerability in sharing their stories generated a sense of trust among the participants. Participants had a sense that their relationship with the formators was a collegial partnership in the learning and formation process. They experienced the formators' trust and willingness to be vulnerable as contributing to their emerging sense of confidence in the learning environment. This resulted in participants feeling more comfortable to share at a deeper level. It also encouraged participants to reflect more deeply on their self-awareness and what they already knew. The following comment is illustrative of the trust experienced by participants as a result of formators' vulnerability.

It was not as if they set themselves up as more superior or knowledgeable but they were on the same journey perhaps just a little more advanced in terms of experience. I had a sense that they were more partners than gurus. It was the trust in the leaders; trust that they were willing to be vulnerable. (Q13).

When participants experience an egalitarian relationship with the formators, trust develops that encourages participants to experience the learning process as a partnership with formators. The formators' way of interacting with the participants helps build a supportive and mutual relationship between participants and formators. By being able to trust the formators as collaborators in the process, participants feel empowered to engage more actively with each other in the learning process.

5.1.1.2 Being willing to share.

The willingness of formators to share personal experiences encouraged participants to contribute to the learning process. The formators' openness and vulnerability stimulated participants to take a more active part in the learning context. Vulnerability describes a position of risk taking, being susceptible to harm or open to criticism (Zajonc, 2006). The formators' willingness to vulnerably share fostered a more focused level of engagement that encouraged participants to be vulnerable in their practice of spiritual direction. The participants attributed their level of engagement with the way the formators modelled vulnerability for them. The following comments reflect the impact of the open stance of formators on the learning context.

The formators brought practical examples from their own experience to illustrate what was being discussed and they were positioning themselves in a place of vulnerability in doing it because they were sharing from their own experience. For the formators to share helped and encouraged us to talk about our experiences and insights. It goes back to the issue of integrity, openness and realness. It was a value underpinning the course that I really appreciated. (S13)

In situations where formators share their experiences openly, in order to make the curriculum content more relevant, participants are encouraged to be more open and vulnerable in engaging with the learning process. By modeling appropriate and effective avenues of communication and disclosure within the learning process, formators demonstrate the values that undergird the learning process and assist participants in adopting these values as part of their sharing and practice.

5.1.1.3 Embodying core values.

The formators' embodiment of core values of openness, safety and vulnerability within the learning context enabled the participants to engage with learning in challenging circumstances. The attributes of formators were significant in influencing the manner in which they approached the learning process. By embodying core personal values in their teaching, the formators provided a context in which participants grew in confidence to apply them in the learning process. This enabled participants to be open to challenges in situations where they may have felt vulnerable. While applying their personal approaches to teaching,

the formators demonstrated that their approaches were grounded in core values that underpinned the way they taught. These core values, embodied by formators, contributed to an egalitarian partnership in learning and teaching. Participants sensed that they were supported in the learning process as reflected in the following observations.

The formation team was a very important part of the program. They all brought their own uniqueness. They did not act like experts or the gurus standing up the front telling me how I should be doing it or what I should think. The core values that the formation team demonstrated were really needed to create that place that enabled people to grow. Even though we were challenged and pushed, it was still safe. (T11)

The participants feel safe in learning situations that appear challenging and pressured, when the formators demonstrate consistency in their interactions with participants. By modelling egalitarian values in teaching spiritual directors, formators display the characteristics that need to be applied to create safe environments for their directees.

5.1.1.4 Allowing interplay between leadership and vulnerability.

While enacting the traits of openness and vulnerability, the formators maintained a leading role within the learning context. The formators' leadership, associated with facilitating and guiding learning, was complemented by their open and vulnerable approach to teaching. The formators' leadership in the course created a learning environment that promoted active engagement by participants with the learning process. Similar to previous responses, the following response captures how another participant experienced the leadership approach of the formators. "Formators modelled a very good leadership, a very quiet leadership. It was not a heavy approach but I felt totally safe. Their manner and just everything about them meant I felt I was in a safe place" (G08).

The leadership, embodied in formators, generates a context in which participants feel safe to participate. The formators' willingness to be vulnerable leaders does not compromise their leadership as formators but does contribute to an environment of safety that participants appreciate.

The formators were willing to share their wisdom from both a place of vulnerability and authority. This stimulated participants to explore aspects of their own vulnerability and wisdom. Rather than seeing the formators as hierarchical authorities, detached from the

learning process, participants were able to relate to the vulnerable manner in which formators shared. This enabled them to see connections with their own wisdom, insights and sense of self. When participants became aware of the formators' vulnerability, they sensed that they were able to get in touch with their own ability to be vulnerable. This is illustrated in the comments that follow.

The formators came across as having authority in the good sense of the word. Often authority is seen as being up there and looking down but they had wisdom and were willing to share that wisdom and their own vulnerability. That encouraged me to be myself and be in touch with my own vulnerability and open to my own wisdom. (E12)

Participants' awareness of the formators' vulnerability enhances learning by encouraging them to have confidence to respect their own insights as they engage with what is emerging in the learning process. The formators vulnerability in association with their authority enabled participants to discover their own authority in the midst of being vulnerable in sharing their insights.

As well as being open and vulnerable leaders, formators modelled learning and practice. The following section explores the ways this was expressed in the learning context.

5.1.2 Modelling learning and practice.

Formators contributed to the participants learning not only by guiding the process and contributing their insights but also through demonstrating how it relates to their learning and practice. The modelling of learning and practice by the formators contributed to participants' learning in relation to three factors that enhanced the process. These were: demonstrating cooperation and collegiality; modelling what was being taught; and providing a range of perspectives. These aspects of the formators' roles are examined in the following sections.

5.1.2.1 Demonstrating cooperation and collegiality.

The manner in which the formation team taught as a cohort supporting each other broadened the learning experience of the participants. The openness and mutual respect of the formation team for each other modelled an egalitarian approach to learning that was reflected in the ease with which they related to each other. This created a context in which participants felt comfortable to engage in the learning process. The following comment captures the dynamics that occurred when three formators were leading together.

My experience was that formators supported each other well. I think about some of the dynamics in the last year between the three formators. Their relationships were key and pivotal in lots of ways to us being able to learn. The relationship between the three formators was an open and respectful relationship. I did not get the sense that anyone wanted to be superior over the others. They were comfortable with themselves. They were all learning. (T11)

The willingness of formators to support each other, rather than competing with each other, displays an attitude that reflects a non-competitive approach to the practice of spiritual direction. By modelling respectful interactions with each other, formators show how cooperative approaches to engagement can assist participants in entering into the learning process together.

The very personal manner in which formators related to each other impacted participants' sense of security within the learning environment. The collegiality and respect formators' had for each other enabled them to demonstrate the traits that model spiritual direction relationships. These relationships are fostered when spiritual directors create a supportive environment or *holding space* for their directees. These perceptions are reflected in a comment that states there was "a sense of communal rapport between the formation team of being held in a holding space through the communal formation team's approach that I did not get at university" (C12). The collegial relationships among formators lead to participants experiencing the sense of support in a safe *holding space* (Winnicott, 1964; 1969). *Holding space* is a term commonly used in spiritual direction to describe a completely safe and supported environment. The flow-on effect of the formators' relationships with each other produces an environment that participants experience as conducive to learning.

5.1.2.2 Modelling what is being taught.

There was a connection between the way in which the formators engaged their own experiences and the teaching approaches they employed that modelled learning in the spiritual direction course. The formators' willingness to share their personal experiences in the learning context contributed to both modelling the manner in which learning is done and their openness to do it with others. As a result of formators modelling a process of self-examination and reflection, the participants learned ways to process their personal life

experiences. An example of responses supporting this observation is expressed in these comments.

It was reflected in the way formators engaged with us in relation to their personal experiences. It was part of their teaching method that was quite revealing. I was learning about revealing and exploring my inner self. This was so I could help my directees find that space and courage. I recognized formators as leaders engaged in real role modelling. It's about the sense that formators were living what they were saying or wanting to share with us. (K10)

The personal exposure and authenticity of formators in processing their inner responses and reactions enables participants to become aware of their own need to explore what is happening in their lives. This aids participants in examining how their inner self-awareness assists them in being conscious of the need for their directees to express their life experiences.

Modelling by formators also contributed to opening up the range of perspectives that broadened participants awareness of the issues related to spiritual direction practice.

5.1.2.3 Providing a range of perspectives.

The diversity of backgrounds and experiences represented within the team of formators contributed to providing a range of perspectives and styles of engagement within the spiritual direction course. The unique individual characteristics and experiences of each formator contributed to enriching the learning experience of participants. The diversity of experience, knowledge and motivation of each formation team member provided a range of perspectives and insights for participants to observe as part of their learning. As a result, the participants were able to explore and compare the array of approaches and insights relevant to their own practice of spiritual direction. The following comment captured a commonality in the response from participants that there was “a mix in the composition of the formation team doing the sessions. The different combinations have been good because each one brought their own slightly different style and area of passion, interest, knowledge or way of doing things” (I13).

Having a range of different, equally valid, personal approaches offered by formators, participants are given opportunities to discern which approaches or styles best fit their own

practice of spiritual direction. The modelling of learning and practice by formators contributes to assisting participants in developing self-awareness and personal practices. This also leads to formators demonstrating a willingness to engage in co-learning with participants as explored in the next section.

5.1.3 Engaging in co-learning.

The collegial relationship between formators and participants was a consistent influence in shaping the manner in which learning occurred within the spiritual direction course. The formators' active participation in learning and teaching the contents of the curriculum, as well as in events and social interactions with participants, reinforced a collegial adult learning context of shared responsibilities for learning. There were four notable aspects of formators' involvement in the co-learning process that emerged from the findings. These were: actively listening to and respecting participants, partnership in learning, mutual support, and engagement in ongoing learning. These aspects are explored in the following sections.

5.1.3.1 Actively listening to and respecting participants.

The formators actively engaged with the participants in the learning process. In the practical spiritual direction group sessions, the formators came alongside and shared with participants in the learning process. The formators' experience and knowledge, supplemented by their ability to journey with participants, enabled the participants to deal with vulnerable contexts associated with spiritual direction. This confidence to share in this way was directly linked to the formators' ability to share their insights along with participants' input. A description of formators' influence on the learning environment was expressed in the following comments.

It was good being guided by people who are willing to share their wisdom. This was particularly true for members of the formation team and others who were willing to accompany us. My experience of the formation team members was they were walking alongside us and opening up what spiritual direction was to us but also enabling us to be open to the invitations that were there. (T11)

As a result of the confidence generated by formators' respect for participants, the participants are able to take risks by being more open in sharing within the formation

program. These factors enhance their learning and models key aspects of the curriculum content which contribute to participants' formation as spiritual directors.

5.1.3.2 Creating a partnership in learning.

The formators modelled participation in the learning process by engaging with participants in a variety of shared learning and social contexts. The formators promoted a sense of collegiality in the way they interacted with participants in the learning process and beyond. The formators' approach contributed to participants' sense of being supported in their learning.

Participants noticed that the formators' qualities of patience, acceptance and openness to other views assisted them in learning to access what they already knew. In an adult learning context, partnerships between formators and participants reinforced a shared responsibility and trust in the participants' ability to bring their own insights and understandings to the learning experience (Giles & Alderson, 2008). By working alongside the participants, the formators encouraged them to take more responsibility for their own learning and development as spiritual directors. This was reflected in the description of formators as, "supporting, accepting, patient, and non-judgemental. Words like that express a coming alongside. The team supported us and helped us to find our inner wisdom" (Q13).

The formators' personal engagement with the participants reinforces for participants the collegial nature of the learning process within the spiritual direction course. This reflects a mutual respect for the contributions of both participants and formators based on their own backgrounds, experiences and acquired knowledge. The supportive and non-judgmental manner in which formators relate to participants also enable them to gain confidence in their own insights and wisdom.

5.1.3.3 Encouraging mutual support.

There was an understanding that both parties in the learning process irrespective of role or status were engaged in learning with those with whom they were sharing. Participants perceived that the formators continued to learn irrespective of how long they had been involved in the field. They noticed that formators learned through interacting with participants as part of the learning and teaching process. They were able to be attentive to the participants while also affirming their shared involvement in the learning process. The

formators' personal qualities of being present and attentive to participants enhanced the learning process with reduced emphasis on role distinctions between formators and participants. The following perspective was reflective of this understanding.

I felt we were all respected even though some were in the role of teaching. It was like we were all in it together. I didn't feel much of a distinction even though I knew the staff members were spiritual directors and knew more about the practice. I just felt very much at home with all of us there together. You felt it was an adult respecting you.

(G08)

The collegial relationships between the formators and participants in an adult learning context demonstrate respect for the contribution of the participants' experience to the process. There is also the recognition that it is a shared learning experience. By being present to participants in the learning process, formators reinforce the shared sense of co-learning operating between formators and participants. This is reinforced in the openness to ongoing learning.

5.1.3.4 Engaging in ongoing learning.

Another factor that impacted on the participants learning in the spiritual direction course was the formators' commitment to ongoing or lifelong learning. The participants engaged more actively in the learning context when they perceived that the formators were also involved in ongoing learning. The formators' engagement with the learning process confirmed their own commitment to ongoing learning. This stance of the formators demonstrated to the participants that their own learning continued past the conclusion of the formation program. The way formators responded to the learning context was expressed in the following comment. "They were obviously engaged in their own ongoing learning. The supervision sessions were modelling spiritual direction. It was not about the expert coming into the person's life. It was about working together" (D07).

The formators' commitment to ongoing learning models aspects of the spiritual direction relationship. The participants' role as spiritual directors is to come alongside their directees as co-learners so that they can be present to their directees. This emphasizes to the participants that the relationship with their directees is one of companion rather than expert.

5.1.4 Overview of the influence of formators on learning.

The attributes of formators emerges as a significant factor in promoting learning within the spiritual direction course. The willingness of formators to engage in the learning processes with the participants reflects the qualities of openness and vulnerability. This engenders trust and confidence in participants to be more open in their sharing within the learning context. The modelling of self-disclosure and sharing by the formators encourages participants to examine their own experiences and give voice to their own thoughts. The formators' vulnerability in partnership with their authority stimulates participants to become aware of their own insights and perceptions and to begin trusting aspects of their own wisdom.

The quality of formators' relationships with each other and their diverse styles demonstrate a range of relational approaches to learning and styles of practice for participants related to the principles of spiritual direction. Cooperative and collegial relationships between formators creates a supportive learning environment for participants that model the relationship between spiritual directors and their directees. The personal attributes that formators demonstrate in facilitating the course reflect the curriculum content that participants are learning. The variety of approaches and inputs from the range of formators provide a diverse learning resource for participants to draw on as part of their formation as spiritual directors.

The formators' collegial partnerships with participants encourage mutual respect and support among participants in the process of ongoing learning. The willingness of formators to enter into learning partnerships with participants underpins the adult learning principles of trust and shared responsibility in engaging in the learning process. The mutual support between the participants and formators contributes to participants engaging more confidently in the learning processes. By sharing in the learning process with participants, formators model their personal commitment to the process of ongoing learning that continues beyond the spiritual direction course. These principles are relevant to participants' own self-perceptions about the need for ongoing learning as part of their practice of spiritual direction.

These emerging insights and theories are further discussed in the following section. They are explored in relation to what other studies and literature present in relation to the themes that have emerged from the insights and theories associated with the influence of formators in learning.

5.2 Discussion of Category 3: The Influence of Formators in Learning

The following discussion relates the findings associated with the role of formators in the learning context to recent research and relevant literature. The aspects addressed in this section are identified under four themes: the attributes of formators, role of power in relationships, modelling of unity in diversity, and engagement in co-learning.

5.2.1 The attributes of formators.

The findings from this study confirm that the influence of formators in the learning process is significant in enhancing the formation processes that shape the participant's development as spiritual directors. The open and vulnerable approach to leadership demonstrated by formators encourages participants to engage and share more personally in the learning process. When formators display the attributes of openness and vulnerability tempered with authority, the participants gain confidence to take risks and contribute more fully to the learning process.

Several recent studies have examined the influence of educators on the learning processes of students (Cecero & Prout, 2011, 2014; Garzon, Hall, & Ripley, 2014; Hall, Ripley, Garzon, & Mangis, 2009; Sorenson, Derflinger, Bufford, & McMinn, 2004). These studies have focussed on the role of educators and mentors in engaging with students to integrate curriculum programs into their professional, vocational and personal life experiences.

In this study, the attribute that participants consistently associated with formators' openness in the study was vulnerability. Vulnerability is a term that relates to being open to harm or suffering whether physical, emotional or intellectual (Zajonc, 2006). This term defines for participants what they understand when they speak about the openness of the formators. They are referring to an openness that goes beyond a person's willingness to share what they can control. Vulnerable openness indicates a willingness to venture beyond the positions of personal influence to place oneself at the mercy of circumstances and people that cannot necessarily be controlled. Vulnerability is listed by Zajonc (2006) as one of the key stages in contemplative enquiry that contributes to deepening learning. Participants describe the formators as being vulnerable in the way that they engage with those in the course. The honesty and integrity with which formators share their personal experiences are identified by participants as a vulnerable way of being open with them. They associate this with their

deepening trust in formators and the learning process that resulted from the self-disclosure of formators.

This study identifies openness and vulnerability as specific constructive attributes of formators in promoting learning. The combination of formators' openness in partnership with vulnerability is particularly noted as contributing to participants' ability to access their own insights and wisdom as part of the learning process.

Openness has been identified in previous studies as an attribute that students appreciate in their teachers and mentors (Garzon, Hall, & Ripley, 2014). In a study that built on previous work carried out by Sorenson, Derflinger, Bufford, and McMinn (2004), Ripley, Garzon, Lewis Hall, Mangis and Murphy (2009) identified openness along with "emotional transparency" (2009, p. 9) as central attributes that contribute to students being drawn to teachers or mentors in adult learning contexts. The concept of openness can be understood as cognitive openness where a person is willing to share ideas and opinions without reserve. Affective openness, associated with the term emotional transparency, suggests a willingness to share feelings and emotional reactions openly and freely with those around them. Cognitive openness has been an accepted expression of teacher's engagement with students in the academic adult education sphere (Ripley, Garzon, Lewis Hall, Mangis & Murphy, 2009). Affective openness, however, has often been seen as eroding teachers' authority and objectivity.

The quality of vulnerability, however, points to another level of exposure of teachers, mentors or formators in their relationship with those that they are responsible to teach. Another term that is closely related to vulnerability in spiritual traditions is meekness. Cochran (2008) described meekness as a "willingness to suffer" (p.90). These terms when identified with the role of the formator in the learning context appear to be counterintuitive to the position of control and influence traditionally associated with these roles. Cochran (2011) distinguishes between meekness and humility in suggesting that meekness relates to relational engagement with others while humility is a stance taken towards oneself. Vulnerability is closely associated with meekness in that it is identified with formators' relational engagement with participants in the course. Meek vulnerability appears to describe what participants experienced in formators that encouraged them to engage more readily with their involvement in sharing and participating in the learning process.

For formators to be vulnerable in the learning context raises a number of issues related to the place of power (Wirth, 1997) and control in both directing the learning process and creating a safe environment for participants to openly participate in sharing.

The modelling of openness and vulnerability by formators brings into focus the issue of appropriate boundaries and definition of roles in relationship with the participants in the course. The place of formators' authority and leadership presents a challenge when considering the adoption of an open, meek and vulnerable stance as formators. Traditionally teachers have been seen as the authority in the learning context and were urged to maintain clear boundaries around self-disclosure and personal relational engagement with participants (Borredon, Deffayet, Baker, & Kolb, 2011). The tension between controlling the process to promote efficient and effective learning outcomes and participating in the process to model openness and vulnerability are identified in participant's responses. Their responses indicate that the maintenance of authority by formators is based on embodying the values of openness and vulnerability and being willing to share the personal wisdom they have acquired.

The very personal nature of the shared material contributes to a sense of trust that creates an environment in which participants experience the freedom to engage in personal disclosure while feeling safe. This encourages participants to get in touch with their own wisdom. As Sorenson, Derflinger, Bufford, and McMinn (2004) state, "It does not work for the mentor to say, 'Do as I say, not as I do'. Instead, students want personal access to someone who is modelling integration before them as a living, breathing, flesh-and-blood manifestation of integration-in-process" (p.364). As Miller and Athan (2007) suggests, teachers can stand "behind the veil of so-called professional neutrality" (pp. 18-19). The vulnerability of formators to openly share their stories or personal reactions with participants goes beyond the more controlled openness often couched in terms of professional boundaries and objective presentations. The openness of formators to be vulnerable deepens the relationship and the level of learning that emerges from the adult learning context.

The formators' personal vulnerability in conjunction with their openness and self-disclosure engenders participants' trust in formators and their sense of safety in the learning process. As a result, the participants became more open and willing to be vulnerable in their participation in group sharing and raising questions. Recent studies have shown adult students and participants integrate what they learn through relational engagement with teachers and formators who model affective and personal integration (Garzón, Lewis Hall & Ripley, 2014; Sorenson, Derflinger, Bufford, and McMinn, 2004). Based on attachment

theory, Sorenson et al. (2004) proposed that students' optimal learning is achieved through attachment to their mentors whether they are teachers or therapists or professors. Garzón et al. (2014) further postulate, based on Sorenson's (2004) work, which the attachment participants or students valued is based on the educator's modelling of integrity while also struggling with experiences and questions. These attributes enable formators to maintain clear boundaries around their roles in the learning context while also being open and vulnerable (Garzón et al., 2014).

The formators' modelling of vulnerable openness in adult learning contexts encourages participants to engage within an adult learning environment. This is particularly pertinent in a program such as spiritual direction formation which requires participants to develop critical self-awareness. As Wirth (1997) states in relation to spiritual direction formation, there is a need for formators to be "both pliant and strong" (p.33) so that they remain open to recognize the truth that emerges from their experiences while avoiding the temptation to slip into unconscious and "disengaged uncritical tolerance" (p.33). In an adult learning context such as spiritual direction formation, formators need to be able to model being open and vulnerable. This particularly relates to sharing something of their own personal experiences as a way of encouraging participants to share their experiences within the group learning processes.

The association of vulnerability with leadership raises the issue of power in the formators' relationship with participants. This is explored in the following section.

5.2.2 The role of power in relationships.

The non-hierarchical style of leadership identified by participants within the learning context could imply that formators are able to encourage participants' contributions without needing to assert their authority. As Gopinath (1999) notes, there has been a shift away from teachers and formators being seen as "experts or judges to coaches or facilitators" (1999, p. 10). However, the participants identified the core values of integrity, vulnerable openness, and authenticity as combining to enhance the formators' authority in contributing to an integrated and safe learning environment. This reflects the observation of Freire (1993) that teachers "must first de-authorize ourselves as teachers" (Miller & Athan, 2007, p. 21).

The reduced emphasis on the role of the teachers or their institutions has been found to assist students in feeling more empowered within themselves. However, the participants affirmed the ability of formators to balance their willingness to be vulnerable in entering into the shared learning context with maintaining their authority as leaders of the formation

program. The combination of vulnerability and authority engenders a sense of trust in the formators' role and a feeling of safety within the learning context that contributed to participants feeling empowered to engage deeply and vulnerably in contributing to the learning process.

The participants' perspective of their developing relationships with formators was, however, that the formators maintained their authority as leaders within the learning environment by maintaining their identity as formators. This was in spite of their clear identification with the participants as sojourners (Ripley, Garzón, Hall, Mangis, & Murphy, 2009) or co-learners, which did not then translate into an equal peer relationship. As Wirth (1997) observes, when formators can come to terms with the power associated with their role, they can be more honest in acknowledging that participants are "not their peers: rather colleagues with real role differences" (p.34). The shift in focus of the role of power in the spiritual direction program is reflected in the participant's recognition of the role vulnerability played in association with formators' authority to empower them to get in touch with their own authority and wisdom. This relates to the distinctions identified between traditional and feminist forms of mentoring. The traditional form was associated with the allocation of resources and power to the mentor while feminist approaches are generally more focussed on the resourcing of the mentee to discover their own power (Blumer, Green, Compton & Barrera, 2010). The study acknowledges the role of formators in empowering participants not only to discover their own power but also their own wisdom and insights that inform their practice and understanding of who they are as spiritual directors.

Having the assurance of formators' protective authority, participants are willing to enter into the vulnerable process of sharing sensitive aspects of their experience. For formators to engage in this combination of vulnerability and authority involves risk. The potential for real and authentic involvement in the learning process necessitates taking such risks to empower participants to claim some inner authority to trust their own experience to inform their learning (Miller & Athan, 2007). However, as the findings imply, the participants are able to trust the process where the combination of vulnerable openness and empowering authority contribute to a sense of safety that extends beyond that generated by traditional approaches with imposed power frameworks. The benefits involve the broadening of the perspectives emerging from open and vulnerable sharing that results from the formators' authentic leadership (Blumer, Green, Compton & Barrera, 2010; Murphy & Wright, 2005). This

combination of openness and authority contributes to a more collegial relationship between formators and participants.

As well as being open and vulnerable as leaders in the learning context, formators demonstrate how relational factors also impact learning and processing of experiences in the course context. Their modelling of unity in diversity is explored in the next section of the discussion.

5.2.3 Modelling of unity in diversity.

The formators' relationships with each other and participants and their diverse styles provide a range of relational and practical models for learning about the practice of spiritual direction. Traditionally, teaching has been seen as a solitary profession in which teachers are understood to individually address a class of students as the sole expert dispensing knowledge.

The spiritual direction formation program that is the subject of this study presents an alternative approach. The program involves a team of formators who teach, supervise and mentor participants in a range of learning contexts within the formation program. The low participant to formator ratio could be seen as a contributing factor to the enhanced learning in the program. The manner in which the formators related to each other and participants was also identified as a significant influence on their enhanced learning.

The impact of the quality of the formators' relationships with each other within the learning context has an influence on participants' own formation in the learning processes. The formators' communal rapport as a group is seen to contribute to the participants' formation as they notice the way the formators listen to and respect each other. The relational engagement in the formators' team extends to the way they interact with the participants in listening to and respecting them. This encourages participants to open up and engage in sharing at a deeper and more profound level.

Participants' awareness of the collegial relationships between formators contributes to their formation and learning. They particularly focus on several elements in the formators' relationship with each other and subsequently with the participants. They are the respect they have for each other, the way they listen to each other, and their diversity of experience, expression and practice.

The range of approaches to relationships within the learning environment has tended to be broken up into “teacher-centered”, “student-centered” and “subject-centered” approaches (Palmer, 2007). As Palmer observes, “when student and teacher are the only active agents, community easily slips into narcissism, where either the teacher reigns supreme or students can do no wrong” (2007, p. 119). Palmer (2007) argues for the “subject-centered” approach (p. 119) based on the premise that it moves attention away from the teacher and the students to focus on the curriculum content. He proposes that the *subject-centred* approach places the subject as the central governing factor in the learning process.

The findings from this study suggest, however, that there could be an alternative to the three types of learning environment named here. The focus on the relationships among formators suggests that the participants were noticing another relational dynamic occurring in the learning context. Here the focus is on what occurs between formators which relates more to Buber’s concept of the “sphere of “between”” (2002, p. 241) in which the focus is on the space between formators. By noting the communal rapport and collegiality between the formators, this study suggests that another term, a *community-centred approach*, could be helpful. This approach describes the way formators model engagement with each other for participants within the learning process. This is expressed in the way they respect and listen to each other and the participants. The distinctive aspect of this approach to relationships in learning resonates with Buber’s (2002) reflection on the *sphere of between* which he notes exists when “there is genuine relation only between genuine persons” (2002, p. 239). This is reflected in the way that formators held diverse views and practiced in a range of styles of spiritual direction and teaching and yet were able to relate openly and with integrity. These qualities of community contribute to participants experiencing a sense of being supported and encouraged within the learning context while also being challenged to explore the options the various formators are offering.

The *community-centred approach* does not dismiss the contributions of the other approaches but is distinguished from them. In relation to the *teacher-centred* and the *student-centred approach*, the *community-centred approach* shifts the emphasis away from the teacher and the students to the learning space in the midst of the learning community (Snowden, 2004; Wawrzynski & Jessup-Anger, 2010). In relation to the *subject-centred approach*, the *community-centred approach* recognizes that the subject, while central to the learning process, remains a part of a larger whole that provides broader perspective within which the subject can be considered. The recognition that learning experiences extend

beyond the learning context resonates with the *community-centred approach* in that the subject is seen in the context of the participants' and formators' broader lived experience. When the focus is on the learning space within the community, the value of the formators' and the participants' contributions are seen to be equally respected. Also, the subject can be considered within the broader scope of these perspectives and not reduced to a set of isolated propositions.

In the spiritual direction course, the *community-centred approach* provides an approach that focuses on listening to the "other" whether formator, peer or directee. This occurs in a way that acknowledges participants' learning has connections to the experience of the broader community. There is also the recognition of the diversity of the learning community that contributes a wide range of experiences which informs and challenges participants' understanding of what they are seeking to learn. The significance of the formators role is in shaping and modelling these *learning spaces* or *spheres of between* (Buber, 2002) that promote respect, listening and diversity in the service of learning.

In reference to teacher education, Palmer (2007) observes that peer engagement among teaching staff in dialogue and mutual support assists in enabling teaching staff to withstand the challenges they face. This also contributes to the shared wisdom related to their vocation. While Palmer (2007) was focusing on the role of community in teacher training, the principles apply to the *community-centred approach*, outlined above, in the spiritual direction course. The approach models community to participants and encourages them to create learning spaces with each other that contribute to their support and the accumulation of knowledge and wisdom. The modelling of community by formators, in the spiritual direction course, provides the ongoing means to inform participants' practice and develop their understanding of spiritual direction. The formators promote the learning process by the integration of subject content into the mix of learning spaces that enable participants to engage with the material in a range of communal contexts. As Sorenson, Derflinger, Bufford, and McMinn (2004) observe, students want to see the process of integration modelled in real terms by real people. They value seeing formators and mentors demonstrating, in their interactions with each other, what it means to discern what to choose and how to embark on critical decisions in the process of learning and practice of spiritual direction.

The formators play a central role in modelling and integrating the subject content, experiential elements and the relational aspects of collegiality in the spiritual direction course. This results in a community that becomes a safe "holding space" (Winnicott, 1964) in

which participants and formators can engage in the collective processes of learning. By avoiding the hierarchical approach often associated with the *teacher-centred approach* or reverting to downplaying their authority as reflected in the *student-centred approach*, formators contribute to the development of a learning environment that enhances the learning process (Palmer, 2007). As Palmer (2007) observes, “when authentic community emerges, false differences in power and status disappear” (p. 141). This study provides empirical evidence that, when formators engage with participants in a collegial manner that promotes community, the issues of power and hierarchy are less likely to be influential in the learning environment.

The willingness of the formators to engage in prioritizing the development of a safe and active learning community contributes not only to the current needs of participants to learn but also to the development of the graduate community. The result is a community that has the potential to continue to contribute to participants’ learning as well as modelling the types of learning communities and relationships that guide their practice as spiritual directors. As Foster (2007) proposes, teachers who engage in building community will experience the mutual benefit of transforming the learning community and having “students become agents in the teacher’s continued learning” (Foster 2007, p.42). This connects with the fourth aspect emerging from the findings, the mutual engagement in learning of formators in association with the participants.

5.2.4 Engaging in co-learning.

The fourth aspect of formators’ contribution to learning was identified as their willingness to engage in co-learning with the participants. The participants described this in various ways including “walking alongside” (T11), “coming alongside” (Q13), “we were all together on our journey” (G08), and “it was about working together” (D07). The concept of the formators sharing alongside the participants highlights another element in the approach taken by the formation team to promoting full participation in the learning process.

This approach is seen to be marked by collegial relationships between participants and formators in the learning process. This sense of collegiality encourages the participants to open up within the vulnerable space of the group interactions. The participants are supported in the process when the formators are seen as collaborators who are further along the journey rather than experts or judges who are there to exert influence over them. Participants are

motivated by formators' willingness to share their wisdom and model spiritual direction while acknowledging that they are still learning as part of their own ongoing formation.

The collaborative approach to working alongside participants flows out of the collegial relationships between members of the formation team discussed in the previous section of this study (Sorenson, Derflinger, Bufford, & McMinn, 2004). In this collegial approach, participants' learning is directly impacted by the formators' intentional involvement with them in the relational mix. As Hart (2004) observes, "The teacher-student dynamic is enhanced through this mutual exploration, and ultimately the teacher's own growth transforms the entire space in which education happens" (p. 35). This study indicates that the result is mutual engagement in the learning process which contributes to growth in both formator and participant.

In discussing the role of truth in the learning process, Palmer (2007) argued that if truth is seen to be dispensed by authority figures it appears to be dictatorial. When truth is perceived to be the result of personal perspectives, the learning context resembles an anarchical state. As Palmer also noted, however, when the discovery of truth evolves from a "process of mutual inquiry" (2007, p.52), the learning context develops as a "resourceful and interdependent community" (p. 52). The mutuality of the co-learning approach of formators in relating to participants in the learning process acknowledges the value of each person's contribution to the learning process that, as Hart (2004) observes, also influences the formators' growth and learning as well as that of the participants. The findings supported the concept that acknowledgement of co-learning by both formators and participants promoted a more collegial approach to the learning process.

The effect of the establishment of an egalitarian learning context is to shift the focus away from the formators as the experts to open up discourse and encourage participants to share their experiences more freely. Miller and Athan (2007) describe such an approach within an academic institutional context in terms of relinquishing one's control or power as an educator to address the effects of participants' previous experiences based in fear and disconnection. They describe the resulting scenario grounded in mutual support and respect as "characterized by an equal distribution of power among all 'knowers'" (2007, p. 22). While this appears consistent with the findings of this study, the position of the formators' self-awareness of the power invested in them as leaders of the course still remains relevant as discussed in the previous sections of this chapter. The need for self-awareness of power within relationships reinforces the responsibility spiritual directors take on when they are

practising spiritual direction with their directees. They are responsible for ensuring the safety and openness of their directees while they are in their care.

By promoting the co-learning and collaborative approach within the learning context, formators are also modelling aspects of spiritual direction practice. The emphasis in spiritual direction practice is on companioning or coming alongside of directees in their exploration of their life journey (Barry & Connelly, 2009). Spiritual directors do not come as experts to convey the answers or to instruct directees in how they should live. Their role is to work with the directees as partners in the ongoing learning process and be involved with directees in assisting them to develop and grow.

The manner in which the formators were observed by participants in this study to enact coming alongside them reinforces aspects of the curriculum program in action. This concurs with what Sorenson, Derflinger, Bufford, and McMinn (2004) concluded when they observed that students or participants more readily integrate what they are learning when they observe their teachers, or formators, modelling what they teach. They noted that this occurs when a teacher, or formator, is “modelling before the students' eyes in ways to which students feel they have real access personally, perhaps even as collaborators in the project together” (2004, p. 364). The study notes that when formators actively model what they are seeking to convey, participants engage more intentionally with the learning process.

When formators engage in the process of co-learning with the participants, the participants experience an acknowledgement of their contributions to the process at the same time as the formators continue in their development as spiritual directors and formators. Several scholars have written about the relationship between the teachers and students in higher education contexts drawing on the principles of attachment theory developed by Bowlby (1958) (Garzón & Lewis Hall, 2012; Lewis Hall, Ripley, Garzón, & Mangis, 2009; Sorenson, 1997; Sorenson, Derflinger, Bufford, & McMinn, 2004). In studies of the relationship between professors and students in religion-based higher education institutions, Garzón & Lewis Hall (2012) found that there were two avenues of attachment with professors or instructors. The first related to either attachment to particular traditions or faith perspectives referred to as a “bulwark of the faith” (p.156) and the second related to those who took on the role of “fellow sojourner” (p.156) with students.

The concept of being a sojourner or companion on the road echoes the understanding of the relationship that formators model in a spiritual direction course. This reflected the

relationship that spiritual directors seek to develop with their directees in spiritual direction practice. In some traditions of spiritual direction, spiritual directors are also described as spiritual companions (Edwards, 2001). The formators' modelling of relational elements of spiritual direction practice assisted the participants to relate what they are experiencing to their own practice of spiritual direction.

5.2.5 Overview of the influence of formators on learning.

Category 3 findings highlight the significance of the formators in the processes of learning and leadership within the learning community. This study surmises that the openness and vulnerability of formators in engaging with participants in the learning process encourages participants to share more openly about their own experiences of vulnerability. The open vulnerability of formators also contributes to a developing a level of trust in the formators and the learning process. The authority of formators remains undiminished by the open and vulnerable stance they present within the learning process. The relationships among the team of formators provide a model of exchange and interaction that assists participants in shaping their peer relationships within the learning context. By coming alongside the participants, formators demonstrate how the relationship that they share is one of companionship rather than peers which models the relationship between spiritual directors and their directees.

5.3 Category 4: Community as Learning Context

Learning communities in a spiritual direction course consist of groups of participants and formators in various configurations within and beyond the curriculum program (Snowden, 2004; Wawrzynski & Jessup-Anger, 2010). As well as formal components of the course, participants gather together in informal gatherings to socially and critically engage with each other. In some instances these informal gatherings become opportunities for participants to further discuss the curriculum and to share their experiences related to their practice of spiritual direction.

The learning community influences how participants engage with the learning process both within the formal frameworks of the curriculum program and beyond. The participants observed that involvement in the learning community promoted learning when it exhibited three core factors: a safe and trusted environment, diverse learning groups, and cooperative

approaches to learning. These factors are explored in this section of the findings through their related sub-categories. They are represented diagrammatically in Figure 5.2.



Figure 5.2. Factors contributing to the community as learning context.

These sub-categories are discussed and particular themes that emerged from the data are explored in light of the participants' perceptions of their learning experience.

5.3.1 Safe and trusted environment.

One of the key elements of the learning community was the dynamic created around the safety of the groups in the learning process. Part of the formation process for spiritual directors requires them to know and understand the importance of confidentiality, sensitivity, and vulnerability in their relationships with directees. Participants experienced the community as a safe environment. The safety of the group was a contributing factor to learning in relation to three key elements in the community: confidentiality and trust, willingness to take risks, and shared vulnerability.

5.3.1.1 Confidentiality and trust.

In discussion of category 3, the concept of trust was explored from the perspective of the formators' role within the learning environment. In this section, the trust generated within

the learning community between participants is looked at in terms of the group dynamics that contributed to safety among participants.

The impact of feeling safe within the community enabled participants to embrace confidentiality and trust the learning process. The participants' respect for each other promoted a developing trust within the learning community. This trust heightened participants' sense of confidence in the learning process. This was illustrated by comments about the role of confidentiality in the group such as:

The trust allowed me to be safe and to open up. This was encouraging and empowering. I could take a risk where in another setting I would not. I knew at the beginning of the course that formators naturally lay some parameters in front of us about the fact that this was going to be revealing and deeply personal. They talked about confidentiality but beyond that it was something that grew without words. We did not actually talk about it but we learned it and as we engaged with it, it grew more. (K10)

The manner in which confidentiality grows within the groups contributes to the sense of safety and trust participants experienced in the learning process. The trust and safety experienced in interactions within the groups enables participants to share about experiences and situations. This assists them to share both deep and uncomfortable aspects of their life and learning experience.

The influence of the learning community on the participants contributed to them feeling encouraged and empowered in their engagement with others in the learning process. The learning community developed as an environment that promoted confidentiality and openness to share within the groups at a level of self-disclosure that assisted participants to learn from each other. A further example of this is captured in the following response.

We just didn't learn about being the director by ourselves. We learnt it from each other when we acted in those roles. As a very small group with only three or four, we shared very personally with one another because there was an atmosphere in which trust was engendered. We felt that whatever we came up with when we were in the role of directee, we could rely on other people to be sensitive and trust the confidentiality of the group. The fact that the rules around that were made clear in the beginning meant what was said in these small groups stayed there. (U11).

The manner in which the groups maintain confidentiality promotes participants' ability to share personal aspects of their life experience in the learning process. This also contributes to understanding the role of confidentiality and trust in the spiritual direction relationship between director and directee. In the group setting and as part of the practical group work, the participants experience firsthand the impact of confidentiality on their spiritual direction practice.

Another aspect of safety and trust in the learning community is the willingness to take risks in the interactions that occur in the process of sharing experiences. This aspect of the findings is explored in the following section.

5.3.1.2 Willingness to take risks.

The learning community developed in manner that encouraged participants to go beyond their normal boundaries of engagement and take risks in sharing more personal aspects of their experiences in their learning and practice within the course. This included taking risks in what the participants disclosed about their personal experiences. The group dynamics that were inherent in the learning community provided an environment in which participants felt they were able to take risks. This was expressed by the statement that participants "noticed people taking risks with what they shared. They dared to put it out there and say it out loud. I think that showed a commitment to each other's learning" (E12).

The willingness of participants to take risks and share within the formation context enriches the learning experience by providing an opportunity for them to explore experiences that they would normally not talk about in group contexts. This enables them to reflect deeply on their own personal experience and contribute to the learning of others.

When participants experienced the support of the group within the learning community, they were willing to embark on the process of opening up and taking risks. The participants were able to take risks in sharing beyond their normal comfort levels when they knew that the learning community of colleagues and supervisors was supportive of them. The sense of collegiality within the learning community promoted openness within the group and with supervisors. This was reflected in comments about the dynamics in the group interactions such as:

It was the ability to take risks and know that I was supported. There was that sense of being supported by knowing that there was a supervision session coming up. It was also

knowing that I had colleagues on the same journey as I was on who shared that experience and to know what happened in my case was not just unique to me. (Q13)

The dynamics within the learning community extend beyond the component contexts of supervision and group work to enable participants to engage courageously in the learning process wherever they were involved. The supportive environment promotes awareness that the participants are not on their own in experiences which contributes to a sense of safety in the midst of taking risks.

Going beyond their willingness to take risks, participants realised that they were able to be vulnerable with each other in a way that promoted openness and trust within the learning community.

5.3.1.3 Shared vulnerability.

The shared vulnerability of formators and colleagues contributed to creating an atmosphere within the community that enabled participants to engage more deeply with their own experiences. The willingness of participants to be vulnerable with each other generated a dynamic within the learning community that enabled participants to explore personal aspects of their experience which enriched their learning. The shared vulnerability also contributed to allowing them to trust one another in the process of self-disclosure. This was reflected in comments about role modelling within the community where “there was vulnerability. In the vulnerability when meeting with another, there was a permission or trust to allow whatever else was going on in the room to help me go just that little bit deeper” (R13).

The group dynamic results in participants experiencing a freedom within to let go of what was happening around them and focus on the learning experience. The trust generated by the shared vulnerability in the group enables participants to go deeper in both their self-reflection and sharing within the group.

The growing relationships within the learning community resulting from the shared vulnerability contributed to extending the learning process by hearing about aspects of each other’s lives. The dynamic nature of the learning community was evidenced in the growing levels of trust experienced by participants and their willingness to ask and answer questions. This was expressed in the experience of being part of small peer groups throughout the course.

It was a level of trust we developed with each other and our preparedness to be vulnerable and to question and wonder and be uncertain. I was able to say “I cannot understand spiritual direction”. It was just that relationship growing over time. (E12)

By being open to the uncertainty of what is happening in the group contexts, the participants develop an openness to ask the difficult or awkward questions that contribute to deepening their learning about spiritual direction practice. The group dynamics also provide participants with the confidence to explore aspects of their learning experience where they experience the wonder of new discoveries.

5.3.2 Diverse learning group.

Another dynamic within the learning community emerged out of the diversity of the group that enriched their learning in two ways: broadened life perspectives; and bonding in diversity. The influence of the diverse learning community on these aspects will be explored in the following sections.

5.3.2.1 Broadened life perspective.

The impact of diversity in the group contributed to participants being challenged to learn from the variety of perspectives and experiences represented in the learning community. The diverse range of experiences, worldviews or religious perspectives in the learning group contributed to enhancing participant’s self-identity and awareness. This challenged them to examine their own worldviews in the light of other perspectives. The group dynamics that resulted from the diversity of experiences represented in the learning community challenged participants to re-examine their preconceived understandings of other people’s perspectives. This assisted in broadening participant’s perspectives on how others’ experiences and viewpoints related to their own personal views of life. A general perception conveyed by the findings is reflected in the following comment.

As time went on we discovered that we were even more different than we first thought but there was also this place of common meeting. There was richness in the different ways in which people experienced God and life. I liked the diversity in the group because it made me work very hard, more than if we had all been from the same spiritual background. (N07)

The broader perspectives that emerge from the group interactions enhance participants' learning by utilizing the experiences and worldviews of their peers to discover new insights and awareness into how they make sense of their own experiences. This contributes to participants being confronted with the need to review their worldviews in light of these alternative perspectives.

Participants learned to reflect on their worldviews and critically assess how these related to what they were learning in the spiritual direction course. The group dynamics that resulted from having a diverse learning group contributed to enhancing the learning experience as captured in the following response.

It was the opportunity to listen to others and to read and observe other forms of expressing faith. It was thinking in different ways outside of what we would normally encounter in our everyday experience of life. It was having peers to engage with on a regular basis from different traditions and seeing how their faith traditions were expressed and experienced and how we can engage with those. (O07)

The dynamics of participating in an assorted group of people holding different perspectives prepares participants to work with a range of directees in their spiritual direction practice. This assisted in creating an atmosphere of ease when exploring differing perspectives and enabling participants to learn from the interactions with people from dissimilar backgrounds.

In reflecting on the diversity of the group and its influence on their own perspectives, the following statement was offered. "It was learning from the other and being able to sit very comfortably with someone who comes from a conservative, Catholic or Quaker background. Being invited into that richness of experience was really important" (T11).

The effect of diversity in the learning community promotes awareness of the range of experiences and perspectives that directees may bring to spiritual direction sessions. The variety of participants within the learning community contributes to the formation of participants as spiritual directors by promoting awareness of these different perspectives that may exist between director and directee in the spiritual direction relationship. Flowing out of the experience of diversity is the experience of bonding and being held that develops within a diverse learning community.

5.3.2.2 *Bonding in diversity.*

The quality of the relationships within the diverse learning community created a group dynamic that contributed to participants feeling safe in the learning process. As a result of the safety emerging from the group dynamics, the diversity within the group enhanced the level of support in the group. The group dynamics resulting from the developing connection between participants in the diverse community promoted deeper engagement with the personal experiences relating to the practice of spiritual direction. One comment on the diverse nature of the community noted the level of bonding within the groups and the positive effect of this bonding.

As a result of the bond that developed in such a diverse group, there have been situations where people in the group have supported me in a deep place where I haven't been able to support myself. It has taken me a little deeper or further in a safe way.

(R13)

Due to the bond that develops among them, this participants feel supported to go deeper in reflecting on experiences that they have not been able to broach themselves. They experience a freedom to explore and reflect on these aspects of their lives because of the strong relationships that develop within the diverse learning community. The depth of engagement is also attributed to the sense of support and safety generated within the group context.

One of the core elements of spiritual direction that participants experienced and related to their own practice was the concept of *being held*. This refers to the theory of the *holding environment* made popular by Winnicott (1964). The *holding environment* describes the way therapists provide a space for clients to feel safe in a therapeutic context. Using the concept of *being held* as a reference to creating a safe and confidential group environment, the integrated nature of learning is captured in the following response.

It was a kind of being held where we held each other in a way that was quite different. I was encouraged because of the sense of security to be able to learn, make mistakes and grow knowing there were others doing the same thing around me and that was a vital thing for our spiritual direction work. It was modelling our relationships in a way. There were echoes of the same thing that we can carry into our spiritual direction practice so it enabled us to learn what we were living. (I13)

The relationship between group interactions and elements of the spiritual direction practice advances learning through the recognition of shared aspects inherent in them that contribute to common understandings. Participants learn from observing one another and applying what emerges from contemplating these experiences to their spiritual direction practice. This grounds their learning in real life interactions.

Participants' experience of being held in the learning group enabled them to make the connection between being safely supported in the group and the directees' experience of feeling supported in the spiritual direction session. A sense of community in the course developed in relation to feeling protected when revealing intimate aspects of personal life experiences and emotions. The group as a whole generated an environment of safety and trust rather than participants or formators controlling the process. This is reflected in the following comment. "Someone would have tears and you cared for each other. It was well held and I deliberately didn't use the word control. The same occurred with the others in the group where it was just a safe and trusted place" (G08).

The ability of the diverse community to provide a safe environment enables participants to engage with new and challenging experiences in the group work that is part of the learning process. In spite of their various emotional responses to what is revealed, participants develop a holding environment within the community that ensures what was shared in the groups is held in confidence. The diverse nature of the learning community enriches the learning experiences within the spiritual direction course by challenging and stimulating participants to consider other perspectives on practice, worldviews and life.

The participants also observed that their learning was enhanced by the manner in which they cooperated together within and beyond the course.

5.3.3 Cooperative learning approach.

The cooperative nature of group interactions impacted learning in ways that occurred within the course and extended beyond the formal structures. Several aspects of group relationships that influenced the learning process in other contexts included: connectedness within the group, learning beyond the formal course, and developing peer support and relationships. These will be explored in the following sections.

5.3.3.1 Connectedness within the group.

The importance of community and the relationships that developed within the learning context further emphasized the significance of collegial, interactive approaches to learning addressed in the previous chapter. The experience of sensing a connection with other participants and beyond in the learning process has been associated with the spiritual dimension of community (Archibald & Hall, 2008; Palmer, Zajonc & Scribner, 2010). The identification of connectedness in relation to the spiritual direction learning community was observed as a significant part of the learning process. Awareness of the connections that extended beyond themselves and the learning community contributed to participants gaining a deeper appreciation for the interconnectedness of relationships and learning. A comment that exemplified participants' experience of connectedness is expressed in this statement.

The sense was that we were all in it together. I was surprised when I look at our group. There were people that I would never connect with normally and yet there was such a connectedness amongst us that was a gift and a real surprise. Being so close and being able to share so deeply the raw things have been fantastic in the practice of spiritual direction. (J13)

The experience of connectedness results in participants contributing aspects of their experiences to the group that normally would be considered too sensitive to share in a communal learning context. The depth and sensitivity of sharing that emerges from the connectedness in the group is significant in contributing to the formation of the participants' personal identity and spiritual direction practice. Connectedness indicates a strong association with the collegial, interactive approach to learning. Within this approach, participants experience a common link with their peers in engaging with the learning process that evolves out of their shared experiences.

As well as providing a context for deep sharing, the connections that developed in the learning community promoted relational closeness and support. The connections and intimacy that emerged in the learning context were independent of relationships that occurred beyond the learning environment. There was a sense of support and encouragement among participants in what they shared with each other within the confines of the learning process. The connections evolved in spite of the lack of relational engagement between sessions as expressed in these reflections.

There were more active, reflective processes happening when we were doing the quads or triads on the intensive as spiritual director or directee or observer. There was that sense of the sacred space together that deepens that kind of connection with each other. We were reflecting intimate personal aspects deeply with each other. We may not know what our regular lives looked like to each other but that deeper sharing enhanced the intimacy. There was the connection to one another along with support and encouragement. This echoed a sense of journeying together and the support that comes from that. (I13)

In the spiritual direction course, participants come with a range of perspectives and the connectedness they experience together related to the depth of engagement and shared experience in the learning context. This contributes to a depth in their interactions and intimacy in their engagement with their shared experiences within the spiritual direction course. Another facet of this is also experienced beyond the formal course frameworks.

5.3.3.2 Learning beyond the formal course.

The relationships and learning dynamics that emerged from the formal aspects of the course flowed over into the casual community interactions that happened in between the structured elements of the program. Informal arrangements between participants in the group contributed to supplementing the learning processes.

The dynamics in the informal group gatherings such as meal breaks or meeting over coffee outside the formal teaching context extended participants' learning by providing them opportunities to continue to interact with their peers. The course modelled ways of being together in the learning community that could be applied in other contexts beyond the course. These included ways to safely share deeply personal aspects of life and to discuss openly the curriculum content beyond the formal course structures. This is illustrated in a comment that describes an informal gathering of participants in contexts other than those structured into the course.

The learning certainly has spread outwards for me because all the role modelling and living of that relationship moved outside the classroom setting. This became a very important and valuable part of formation. All the things we were already engaged with in the formation program were already moving out. There was a little safe space at our informal gatherings and someone could still say something deeply personal. This was

an amazing thing and reflected spiritual direction. The role modelling of the way of being with each other meant we talked about topics from the previous formal sessions. It was an appendage to our learning but also a style of learning. The whole thing was invigorating. (K10)

The effect of the group dynamics in contexts beyond the course contributes to participants experiencing a form of ongoing learning essential to continuing formation. This also means that participants are able to relate the experiences of their interactions beyond the formal setting to their formation as spiritual directors. The participants also experience the safety of the group interactions extending beyond the formal structures of the course. This enables them to continue sharing and interacting at deep personal levels which contributes to their formation and practice with those they journey with beyond the course.

Flowing from the connectedness within and beyond the formal learning community is the development of ongoing peer support and relationships.

5.3.3.3 Developing ongoing peer support and relationships.

The group interactions and dynamics within the course promoted the development of ongoing peer support networks for graduates from the course that enabled learning to extend beyond the course. The sense of support and reinforced bonding that occurred in meeting together beyond the program became key contributors in the formation of spiritual directors. The relationships that formed within and beyond the program became catalysts for strengthening the learning community which in turn promoted the learning process. The dynamic of being together in informal learning groups within and beyond the course contributed to participants gaining confidence to engage more extensively with the learning process. The significance of informal social interactions and gatherings promoted bonding among the participants and with formators. Over time these opportunities to be together contributed to the participants' formation of community within and beyond the formal learning context. These arrangements were also seen as opportunities to support each other in the learning process through encouragement in the academic exercises such as essays which was reflected in the following comment.

We have been meeting not just in the quad groups but also started to meet as a separate peer group to encourage each other with our essays. We felt sometimes in the group learning sessions you almost get to the point where you say aha and it is time to finish.

So we have been able to carry on into the informal group time and support one another in that. Even some email contacts and having coffees with one or two here and there. It staggers me how close we had become as people who see each other about three or four times each year. (J13)

The extra-curricular interactions are not just about practical support for each other but also extend the dialogue and learning that is started in the formal group learning sessions. These informal interactions are seen as significant elements in the development of community and support networks that extend beyond the limits of the course. The connections formed outside the programme become a catalyst for strengthening the learning community which in turn promotes the learning process.

5.3.4 Overview of the findings related to the community as learning context.

The learning community has an identity and dynamic that operates to advance participants' learning through contributing to the safety and trust within the learning environment of the course. This feeling of safety within the group is a contributing factor in understanding the importance of confidentiality, vulnerability and openness in the relationship between the director and directee. The sharing of sensitive experiences by participants in the group setting provides opportunities to encounter and understand confidentiality and trust in the learning process and for future encounters with spiritual directees. The sense of confidentiality that develops in the learning community encourages participants to share and reflect more deeply on their personal experiences.

The dynamics that result from the diversity of people participating in the program deepens learning and fosters participants' formation as spiritual directors by promoting an awareness of the diverse range of people that spiritual directors encounter in their practice and how their differences impact the spiritual direction relationship. Within the diverse learning community, participants encounter a range of perspectives which contributes to a broadened view of others' experiences and perspectives. By involvement in a diverse learning community, participants are challenged to review their perspectives on life and how these shape their own self-awareness.

The connection between the dynamics occurring in group interactions and aspects of spiritual direction practice contributes to participants' learning from each other. The communal exchanges around aspects of the spiritual direction curriculum extend participants'

learning in the relational aspects of spiritual direction practice. In reflecting on the relationship between group dynamics and spiritual direction practice, the course models key elements of the curriculum. Participants notice what is happening in the communal exchanges between participants and their engagement with aspects of spiritual direction practice.

Cooperative relationships among participants within and beyond the program provide greater opportunity to support each other in broadening their learning. The relational dynamics that are initiated and modelled in the formal aspects of the formation program flow over into informal community events, like meal breaks and casual meetings in cafes, extending the opportunity for shared learning. The informal support and relationships in casual settings extend participants' learning by providing additional opportunities to interact together in other contexts.

These emerging insights are further examined in the following discussion. They are explored in association with other studies and literature.

5.4 Discussion of Category 4: The Community as Learning Context

The role of the community of formators and peers in the participants' experience contributes significantly to the process of learning. The findings emerging from the data relating to community suggest that the nature of the learning community influences participants' learning in relation to three main factors: safety; engaging with diversity; and cooperation within the learning community. These factors are explored in the following sections.

5.4.1 Safety in the learning community.

The issue of safety in the learning community has received a growing amount of attention in recent decades. Boostrom (1998) observed that during the 1980's and 1990's there was an increasing number of the articles that refer to "safe space" or "safe place" (p. 399) in relation to teaching and learning environments. The following sections discuss and identify some insights which have emerged from a close study of the data. They include: confidentiality as a foundation for deeper learning; and different approaches to safety in the learning environment.

5.4.1.1 Confidentiality as a foundation for deeper learning.

Commitment to confidentiality in relation to what is shared within the learning community is identified as a significant contributor to participants' perception of safety within the spiritual direction course. Confidentiality within the spiritual direction course operates at two levels which reflect the rules of engagement applied in Quaker *clearness committees* (Palmer, 2007). At one level, what is shared in the learning context is held in confidence by those present in the group. This application of confidentiality is intended to ensure that the sensitive information shared in the group is not disseminated to others who were not present. By applying this approach to confidentiality in the spiritual direction formation course, participants trust that what they share in the group will not be talked about without their express knowledge and approval.

A second level of confidentiality relates to members of a group not approaching a person who has shared within the group to talk with them outside the group setting about what they have said. Palmer (2007) refers to this second level of confidentiality as the "uncommon rule of deep confidentiality" (p. 160). The purpose for limiting ongoing conversation with a person who has contributed in a group is to protect that person from engaging in conversations they may be uncomfortable to continue beyond the bounds of the confidential learning space. They may also be concerned with talking about what is shared in the group in the presence of someone who may not understand the context or discourse in which the original conversation occurred.

By applying these two conditions of confidentiality at the start of a course, participants are able to enter more freely into openly sharing within groups. The impact of confidentiality on their involvement in the learning process grows beyond their initial experience of engaging in confidential conversations. The participants develop an appreciation for the role of confidentiality without it needing to be regularly reinforced by formators. This highlights the effect of participants coming to embrace the application of confidentiality within the spiritual direction course.

One of the reasons that this approach works, in preparing the learning community for sharing within groups, relates to the nature of the subject matter discussed in the course. The deeply personal nature of discussions and practice in the spiritual direction course accentuates the need for protecting participants in relation to what they share in the group interactions. The application of confidentiality within a learning context is about creating a

safe and trusted environment in which participants are able to start processing some of the deeper and more vulnerable parts of their experience and its impact on them.

The researcher observed that in the spiritual direction course the application of confidentiality developed over time to become a naturally reinforced element of a trusted learning environment. This highlighted the significance of cultivating confidentiality early within the learning community (Garcia & Melendez, 1997). The participants also indicated that the deepening effect of confidentiality on the learning context resulted from participants' trust and openness within the learning community as discussed in Chapter 4. The early introduction and engagement with clearly outlined approaches to confidentiality develop from a culture of trust in the community that participants adopt which grows organically within the learning community (Faulkner & Gooding, 2010; Palmer, 2007). One of the features of the development of a safe environment in the course under scrutiny relates to the manner in which confidentiality emerged as a generative influence among the participants.

The findings indicate that, although the formators initiate the agenda of confidentiality in the course, they are not necessarily the ones who control or motivate its growth within the learning group. The participants adopt the agenda and, without prompting or coercion, apply themselves to its implementation. The fact that the participants are the proponents of the use of confidentiality to create a safe learning space suggests a shift in the ownership and application of the process.

When participants in partnership with the formators form collegial relationships with each other, in the application of the principles of confidentiality, the process contributes to a culture that is not dominated or controlled by either party. This effectively creates a safe and trusted learning environment (Garran & Rasmussen, 2014). The generation of trust and confidence through this approach results in participants and formators being able to listen and engage more sensitively with each other (Palmer, 2007). This approach to safety is based on shared participation in the development and maintenance of principles of confidentiality and trust in the learning environment. This study nominates this approach to safety as a *participatory approach* to safety which describes what emerged from the findings in relation to the learning community. This is distinct from the use of the term *participatory safety* used in workplaces to denote participants involvement in identifying safety concerns and bringing them to the attention of management (Kongsvik, Haavik & Gjongsund, 2012; Williams Jr, Ochsner, Marshall, Kimmel, & Martino, 2010; Rocha, Mollo & Daniellou, 2015). In this

study, *participatory approaches to safety* refers to the involvement of all parties in the learning process contributing to maintenance of a safe environment for sharing and learning.

In this next section, the *participatory* approach to safety is compared with other models of safety to identify their relationship with one another and their unique contributions to a range of learning contexts within the course.

5.4.1.2 Different approaches to safety in the learning environment.

Three approaches to safety are compared under the descriptions of *protective*, *prescriptive* (Garraan & Rasmussen, 2014) and *participatory* approaches to safety. This study describes their distinctive characteristics and applications to clarify the unique contribution of the *participatory approach* to its use within the spiritual direction course.

The *protective approach* (Garraan & Rasmussen, 2014) describes an approach to safety where participants feel protected to operate within a safe learning environment. This approach is characterized by the need for participants to be comfortable to engage in creative and free expression about themselves and their thinking without feeling constrained by what others may think or perceive. This is an approach that minimises critical engagement while promoting risk-taking enabling participants to explore and be creative in their self-expression. In the learning environment, the teacher or formator comes to be seen as the protector of the learning space to ensure that the participants are not unduly influenced or distracted by other participants in their learning and creative activities. This approach appears to be most suited to the creative, expressive arts where freedom to experiment beyond the boundaries of accepted practice and understanding is promoted.

In reviewing the literature on approaches to safety in education, Boostrom (1998) argued that much of the twentieth century literature addressing safety in the learning environment has been steeped in this type of approach to safety which he sees as focused primarily on comfort and attempts to “eliminate the pain from education” (1998, p. 405). He contended that such ideals work against the agenda of education which is to challenge participants beyond their comfort zones to consider new and alternative ways of viewing and understanding the world. However, it can be argued that there is a place for this approach to safety which enables participants in some contexts to freely explore their world without the constraints of having to justify their endeavours, at least initially in their processes of learning.

Another justification for this approach is to provide an entry point for participant to adjust to the learning environment. For the majority of participants, engaging in a new context requires significant personal adjustment and space to work out their place within a group. The protective approach to safety provides the space for the early development of group trust and safety.

The *protective approach* when offered by teachers, formators or therapists relates closely to the concept of *holding environment* offered by Winnicott, (1960) to refer to the type of environment parents create for their child to enable them to feel safe in their development. Winnicott (1960) related the relationship between the parent and the child to the space a therapist creates with a patient. This approach is still used in therapy or social work contexts to enable patients or clients to express themselves freely and openly without feeling constrained by what the therapist may think or believe (Garraan & Rasmussen, 2014). The application of this approach to a spiritual formation context places the teacher or formator in the position of the parental role in providing a safe *holding environment* for participants to develop through freedom to explore.

In the spiritual direction context, the protective approach to safety is pertinent to the manner in which a spiritual director initially engages with their directees. In the practice of spiritual direction, spiritual directors seek to create a protective holding space for their directees which gives them the freedom to express themselves fully. Garraan and Rasmussen (2014) observe that “in a therapeutic holding environment, individuals may begin to gain a sense of self that is competent, capable of love, play, and creativity via interactions with key caretaking figures” (p. 404). This highlights the association of this approach to safety with therapeutic and learning environments in which the therapist or teacher takes responsibility for safety as a caretaker.

In summary, the *protective approach* to safety focuses on the maintenance of the learning space to ensure that participants feel free to explore and create with limited critical review or challenge. The role of the teacher, therapist or formator in this scenario is as the primary protector or caretaker of the learning space to ensure the participants are free to express themselves in their learning and development.

The *prescriptive* or *normative* approach to safety is different from the protective approach. This approach is based on concrete directions or predetermined frameworks of operation (Garraan & Rasmussen, 2014). These frameworks provide participants with a clear

understanding of what the rules of engagement are in the learning environment. This approach relates more to what Boostrom (1998) was arguing for when he challenged the approaches to safety that he saw as being too focused on comfort and not enough on critical engagement and challenge for participants.

In the *prescriptive approach*, the teacher or formator generally becomes the instigator and enforcer of the rules of engagement related to critical dialogue and practice. As Osborne (1997) described the situation from a science teacher's perspective, "Rather than thinking of the goal of management as avoiding conflicts between children and between children and teacher, it becomes one of managing those conflicts, even fostering them at times" (p. 194). The *prescriptive approach* (Garraan & Rasmussen, 2014) contributes to a safe environment that enables participants to actively engage in critical dialogue and practice while attempting to minimise undue domination, coercion or harm from or of others in the group. This approach uses agreed processes to enable participants and teachers to have a clear understanding of how they interact. The intention of applying this approach is to provide safety in the process of promoting debate and critical analysis of participant's contributions to the learning environment grounded in original and imaginative thinking (Osborne, 1997). As Boostrom (1998) states "if critical thinking, imagination and individuality are to flourish in classrooms, teachers need to manage conflict, not prohibit it" (p. 407).

One form of the *prescriptive approach* to safety (Garraan & Rasmussen, 2014) is expressed in the application of confidentiality frameworks as discussed in the previous section as well as other guidelines for engagement in critical dialogue (Palmer, 2007). The refinement of meaning and engagement with practice require the ongoing clarification of agendas and principles of practice that define fields such as spiritual direction. This relates to the core of all traditional academic endeavour in its goal of understanding the various disciplines within a very complex world.

In the spiritual direction learning context, the prescriptive approach to safety is relevant to the critical feedback and analysis of skills and practices that participants encounter as part of their theoretical and practical formation. The focus of this approach is to embrace the potential of conflict and difference within the classroom in a manner that promotes participants' engagement with the process of learning. The embracing of conflict needs to occur in balance with participants' experience of safety to encourage and empower them to become actively involved in critical dialogue (Osborne, 1997). The teacher or formator's role is to manage or control the balance between the protective and prescriptive approaches to

safety. This raises the question of what *participatory approaches* to safety can contribute beyond *the protective and prescriptive approaches*.

This study confirms the *participatory approach* as an additional and complimentary approach to the *protective and prescriptive approaches* to safety. As outlined in the findings, the participants observed that safety in the group was generated organically from within the learning community. In the context of learning, the participatory approach refers to the generation of safety within the learning community by the participants' application of trust, openness and vulnerability in their interactions with each other.

The role of the formator in the development of a safe learning environment is to introduce *protective and prescriptive* processes (Palmer, 2007). By initially creating a safe holding space and introducing rules of confidentiality into the learning process, formators contribute to *protective and prescriptive approaches* to safety in the learning environment. When the vulnerable processes of self-disclosure involve personal experiences as part of the learning process, there is a need for participants to take additional responsibility for each other's safety (Helm, 2009). By seeing the value of safety, participants develop a sense of ownership of the process allowing them to share more deeply and freely in the learning process. This results from the emerging sense of openness and trust in each other and the formators which becomes the basis for mutual encouragement to be open and vulnerable in the learning context.

The *participatory* approach to safety involves a level of risk-taking that participants identified in their interviews as an essential aspect of promoting their learning through deepening self-disclosure. They were challenged to go deeper and to critically examine their perspectives, beliefs and self-awareness relating to the situations they encountered. By engaging actively in becoming vulnerable with their peers in spite of the level of discomfort, participants experienced a deepening awareness of new horizons of creative possibilities that extended their learning.

The distinctive aspects of the *participatory approach* to safety relate to the content and context of the learning environment. In the *participatory approach* to safety, the main focus of the learning process tends to apply to awareness of participant's lived experience and how it is influenced by and influences others. The relational aspects of the learning community become more pronounced in their influence on the learning process. This includes the

exploration of the subjective elements of experience including the emotional, sensate, spiritual and intuitive dimensions (Kisfalvi & Oliver, 2015).

The vulnerability of disclosing these aspects of personal experience within group learning contexts calls for a safe environment that enables participants to overcome their fear of being exposed personally to others (Quiros, Kay & Montijo, 2012). For the participants in this study, it was the experience of shared vulnerability that challenged and stimulated the trust between them to open up within the group and contribute to the learning process from their own experiences. The active participation in the learning process with the formators promoted their sense of safety and trust in their peers and the formators. They noticed that this sense of safety and trust grew organically and in many senses went unnoticed until participants experienced a situation where the sense of safety broke down.

The inconspicuous nature of safety in the *participatory approach* also has resonance with Winnicott's (1965) observations that children when they are held well do not notice that they are being held until there is a "slight failure of holding" (1965, p. 113). When the trust has been established, the participants settle into the safe and trusted environment without it needing to be reinforced. The responsibility for maintaining the safety and trust within the *participatory approach* to safety is shared mutually between peers and formators. This responsibility evolves along with the shared vulnerability that participants see as one of the foundational principles of the safe holding space.

The *participatory approach* based in confidential group conversations produces a safe context in which participants are not only open to share their experiences and insights but also are motivated to go deeper in their learning (Biggs, 2012). This is in spite of the fact that most group learning contexts are not conducive to self-disclosure (Quiros, Kay & Montijo, 2012). The safety addressed in the context of the spiritual direction course includes the emotional, spiritual and psychological safety of the participants, their peers and formators (Holley & Steiner, 2005). The confidentiality element of the *participatory approach* enables each of the parties to the conversation to engage safely in each of these aspects of the learning context.

One of the added advantages of the development of participatory approaches to safety is that participants found that they could apply their shared understanding of safety beyond the formal structures of the course in their informal group interactions. This contributes to participants developing the ability to extend their learning opportunities beyond the course as

part of their ongoing formation as spiritual directors. The participatory approach to safety also provides the models for other forms of group engagement in which the generation of safety is not dependent on authority figures being present.

Table 5.1

Different approaches to safety

Approach to safety	Basis for safety	Formators' Role	Students' Role
Protective	The authority and compassion of the responsible party	Protector and responsible party	Protected with limited responsibility
Prescriptive	Parties enter in a contract or agreement to abide by the rules or shared understandings	Referee or manager of the learning process responsible for ensuring conformity to the shared agreement	A conforming participant who is required to follow the rules of engagement
Participative	A shared responsibility for the maintenance of safety based on the quality of relationships between all parties.	Co-facilitator of safety and conformity.	Co-facilitator of safety and conformity

While all three approaches to safety have a role to play in different learning contexts (See Table 5.1), the findings indicate that the *participatory approach* works in conjunction with the *protective and prescriptive approaches* to safety and aligns with the approach taken in the spiritual direction course. The initial generation of safety within the learning community develops through use of the *protective and prescriptive approaches* to safety to encourage participants to own the process. Over time, the *participatory approach* to safety emerges and enables participants to apply it without ongoing recourse to formators to maintain the process.

Another aspect of the findings that relates to safety issues is the impact of diversity on the learning community. This is explored in the next section of the discussion.

5.4.2 Engaging diversity in the learning community.

The diverse range of participants in the spiritual direction course influenced the spiritual formation learning community by: enhanced awareness of a range of perspectives on life; and creating bonds in a heterogeneous learning community.

5.4.2.1 Enhanced awareness of a range of perspectives on life.

Representation from a range of religious traditions, cultural, social and professional backgrounds and gender difference in the group of participants contributes to a diverse mix of perspectives within the learning community. This diversity is seen to contribute to an enhanced awareness of a broad understanding both in relation to how experience is viewed and what meaning evolves from sharing experiences within the group.

Diversity within the learning community enables a broader range of views. There were people in the learning group that participants would not normally associate with who contribute alternative perspectives. The participants were given the opportunity to share with people beyond their normal circles of engagement. In the context of the safety and trust discussed in the previous section, participants came to experience a bonding that enables them to share their divergent views at a deeply personal level. Sharing at such a level of personal experience means that they are processing real life issues and experiences that characterize the diversity of any learning community or potential directees.

The findings indicate that input from a diverse range of participants contributes to broadening the scope of beliefs, experiences, and responses to life that they encounter in their own lived experience. The number of variables in the diverse mix of backgrounds represented in a spiritual direction course deepens the richness of the learning experience. With the spread of religious traditions represented among the participants, the range of beliefs and religious perspectives offers a rich array of alternative ways of expressing and embodying faith outlooks.

Studies examining the impact of diversity in higher education contexts have focussed on the contribution of diversity to learning related to the intellectual and moral aspects of courses (P. Gurin, Dey, Hurtado, & Gurin, 2002; Hurtado, 2005; Watson, Johnson, & Zgourides, 2002). Drawing on Piaget's (Piaget & Gabain, 1965) work with children and

adolescents, P. Gurin, Dey, Hurtado, and Gurin, (2002) argue that students develop intellectually and morally when they are involved in interacting with colleagues who have different perspectives from their own. This became the basis for their study of the impact of racial and ethnic diversity in United States universities in the light of the call for affirmative action (P. Gurin, Dey, Hurtado & Gurin, 2002). They conclude that diversity within the learning communities in universities and colleges positively influences participants' ability to think actively and engage intellectually with what they are learning.

The learning in a spiritual direction course resulting from diversity in a group goes beyond intellectually stimulating the participants with a range of perspectives (Mayhew, Wolniak & Parcarella, 2008). Directees in spiritual direction sessions come from broadly defined and diverse socio-religious groups. So spiritual directors are required to be aware of a breadth of factors which will inform their guidance of directees. This involves them gaining awareness, beyond their own lived experience, of a range of cultural, religious, social, professional and gender issues. Having broad diversity within the learning community improves the ability of participants to engage in deepening their awareness of themselves, their colleagues and others including their directees (Palmer, Zajonc & Scribner, 2010). By sharing in a group that represents cultural, social and religious diversity, participants are able to relate to other perspectives as an extension of their own lived experience.

Flowing from the contribution of diversity to the learning community, the creation of bonds within the learning community was seen as enhancing learning. This is addressed in the following section.

5.4.2.2 Creating bonds in a heterogeneous learning community.

The personal peer relationships that develop within real life situations in a heterogeneous learning community assist participants to prepare to encounter the unpredictable and complex issues that arise in their spiritual direction practice (Hurtado, 2005). The emerging connections with a diverse range of peers contribute to the development of bonds among peers that further promote learning through a freedom of expression and sharing. As Cozolino (2013) contends, the brain has a primary social function that is essential to the process of learning. Referring to attachment theory, Cozolino states “while some educators have called attachment building in the classroom “optional”, I would suggest that it is essential in order to optimize learning” (2013, p. 12).

The development of the ability to connect with a diverse range of others in the process of learning goes beyond information sharing to relational, experiential development. This contributes to enriching the learning process by grounding the learning in a rich communal experience. Diversity, rather than becoming a factor in dividing the community, becomes an asset that extends the learning resources (Menahem, 2011). Celebrating diversity contributes to the growth of connections and bonds that develop over time and promotes positive learning outcomes.

The connections and bonds that evolve within a diverse learning community makes a difference to how each member engages with the learning process and their perspectives and insights become a learning resource rather than a limiting factor. This study also notes that the connections and bonds in the diverse learning community reduce the focus on competition and performance-related distinctions between participants. Another study explored the influence of group diversity through the lens of measuring social capital (Park & Bowman, 2015). Social capital refers to the quality and application of relational factors that influence how people interact with each other in particular social networks (Gopee, 2002). They found that one of the positive outcomes of bridging social capital was lessening the emphasis on differences in the process of engagement and interactions. Through the connections that developed despite the different backgrounds, members of a heterogeneous spiritual direction learning group come to see differences as an expression of complexity rather than as a confusion of multiple perspectives.

Cohesiveness in a diverse learning community has been shown to improve outcomes in the learning process (Garraan & Rasmussen, 2014). Cohesion among the participants in this study emerges when they acknowledge the different perspectives represented in their heterogeneous learning community as enhancing their learning. When participants value the difference between the views and perspectives of others and their own in a context of safety and trust, they are motivated to engage more actively in the shared learning process in which they invest more of themselves.

The provision of a context in which the diversity of the group can be held in safety and trust provides scope for participants to creatively process the complexity of the views offered (Palmer, 2010). While diversity contributes to enriching the learning process, the study also explored the impact of the manner in which participants cooperated together in a variety of contexts both formal and informal.

5.4.3 Cooperation within the learning community – informal and supportive aspects.

The learning experience of participants extended beyond the formal contexts within the spiritual direction course to include informal and peer group activities. The factors influencing participants' learning included: the role of inter-connectivity, and the nature of the informal interactions.

5.4.3.1 The role of inter-connectivity.

The concept of interconnectedness is associated with contemplative approaches to understanding aspects of relational, spiritual and educational phenomena. This concept has also been related to communal approaches to life through the writing of Nhat Hanh (1995, 2000) and his notion of “interbeing” (1995, p. 10). In describing *interbeing*, Nhat Hanh (1995) draws on the Buddhist idea that all things are connected due to their interrelatedness and interdependence.

The sense that all things are made from common elements and so are substantially connected to each other provides the grounds for the notion of *interbeing*. For Nhat Hanh (1995), when *interbeing* is acknowledged, obstacles between members of a group disappear and the way opens for peace and understanding to emerge. Extending Nhat Hanh (2000), Gunnlaugson (2009) believes that this leads to a deepening sense of inclusivity and responsibility for those who engage within the learning situations. This contributes to participants becoming active in shaping one another. Gunnlaugson (2009) proposes that this concept of *interbeing* reflects what needs to be embraced to enable effective learning to occur.

Another perspective of connectedness associated with contemplative processes of learning and understanding draws more from the pure experiential aspects of life. Writing from a psychological perspective, May (1982) speaks of “unitive experiences” (1982, p. 52ff). Unitive experiences relate to experiences where individuals become more acutely aware of encounters that are holistic in scope and express an all pervasive sense of connectedness. May (1982) describes this expression of connectedness as a “keystone of contemplative spirituality” (p. 53). The connectedness associated with a collegial, interactive approach contributes to extending awareness of experiences related to contemplative approaches within spiritual direction courses.

The concepts of *interbeing* and *unitive experiences* convey something of the significance of interconnectedness that enhances the collegial approach to learning. This study found that participants experience connectedness in their interactive relationships with each other and in their subjective awareness of aspects of their own experiences. While both concepts inform the experiences of the participants in the course, the concept of *unitive experiences* provides a more relevant expression of the experience of connectedness. The notion of *interbeing* focuses more on what this study refers to as *substantial connectedness* which relates to the focus on the connectedness based on commonality of concrete experiences. *Unitive experience*, on the other hand, draws attention to the experiential basis of connection and the relational nature of these connections within the broader lived experiences of participants.

Flowing out of the awareness of *unitive experiences* of connection, there are changes and shifts in participants' consciousness of both the interactions with others and with themselves. Acknowledgement of the interconnectedness of the various circumstances and relationships in spiritual direction courses can contribute to participants experiencing transformative shifts in their learning and personal awareness. The findings indicate that as a result of connectedness within the learning group, participants feel supported and encouraged in the processing of learning and engaging with self-awareness. A mutual empowering of peers flows from the experience of unity associated with feeling connected to each other (Gunnlaugson, 2009). The level of intimacy that is generated out of *unitive experiences* of connection are associated with a sense of empathy (Pavlovich & Krahnke, 2012) and compassion (Nhat Hanh, 1995) that participants experience in relation to others and themselves. The findings reflect something of the depth of relationship that results from the connectedness participants experience in the spiritual direction course.

The collegial approach incorporating both the personal and subjective approaches to experiences from a first person perspective have been challenged by academics. They claim the subjective perspective cannot be substantiated empirically or within the epistemological frameworks familiar to Western academic pedagogies (Roth, 2006; Roy, 2006). The ontological nature of the subjective perspectives suggest that the experiences encountered through these perspectives do not fit within the epistemological frameworks of the objective perspectives associated with the traditional academic approaches to learning (Roy, 2006). As Roy (2006) observed, "the ontological does not contain the epistemological, nor vice-versa; neither should it be imagined that the epistemological somehow arises from the ontological,

or vice-versa” (2006, p. 133). A collegial, interactive approach provides avenues for both subjective, ontological approaches and objective, epistemological approaches to be brought together in dialogue which opens the way for awareness of their relationship to each other.

The decentralising of the individual within the learning context through connectedness challenges traditional approaches to learning that are either *teacher centred* or *student centred* (Bai, 1999; Palmer, 2009). As the findings indicate, this means that neither the subjective approach of an individual perspective nor the purely objective, scientific approach dominates the processes of learning. Instead, through connectivity in the learning community, both approaches are provided space to connect with each other and this leads to a more integrated approach to learning.

The experience of connectivity within the learning community extends beyond the formal curriculum program to impact the informal interactions of the participants as outlined in the next section.

5.4.3.2 The nature of the informal interactions.

The cooperative relationships that develop within and beyond the formal learning environment create a group dynamic that extends learning to informal engagements in a range of social contexts. In situations such as meal or program breaks, participants have the opportunity to casually engage in interactions that extend the dialogue that has arisen during lectures or practical sessions. These informal interactions also provide opportunities for participants to take advantage of each other’s experiences and knowledge. The study findings support the view that these informal interactions contribute to extending the opportunity to process what comes up in the formal aspects of the course.

These findings resonate with other studies which contend that the engagement with peers in informal interactions about the course extends participant’s learning and produces improved academic and social outcomes (Engberg & Hurtado, 2011; Gurin, Dey, Hurtado & Gurin, 2002; Hurtado & DeAngelo, 2012). One of the subthemes that emerged from these studies in the United States was the significant influence informal interactions between peers had on a range of positive outcomes. As P. Gurin, Dey, Hurtado, & Gurin (2002) conclude “in the national study, informal interactional diversity was especially influential in accounting for higher levels of intellectual engagement and self-assessed academic skills” (p. 351). The focus of these studies is on progressing the arguments in support of racial diversity

in higher education institutions. A follow up study by Hurtado & DeAngelo (2012) found that both “informal and formally structured activities during college appear to build students’ self-confidence in their abilities to function in a diverse, global, and interconnected society” (p. 20).

The findings of the 2012 study support the view that informal engagement within higher education institutions extends the opportunities for participants to engage in personal sharing and critical dialogue that promotes learning beyond the formal course contexts. Other studies have looked at the role of informal learning in the workplace and other forms of continuing education (Billett, 2001, 2008; Colley, Hodkinson & Malcolm, 2007; Eraut, 2011; Malcolm, Hodkinson & Colley, 2003). Billett (2001) and Eraut (2011) have argued that learning tends to happen more often outside the formal academic and educational formats. Eraut (2011) resolves that students learn more effectively through their work contexts than occurs in the situations that they encounter in more formal settings. However, Malcolm, Hodkinson & Colley (2003) contend that distinguishing between formal and informal learning can create an artificial distinction between different learning contexts while each exhibit both formal and informal elements.

In the spiritual direction course, the distinction between formal and informal elements of learning relates to the situations in which learning occurs. As participants noted, the content of their informal interactions often relate directly to the formal content of lectures or practical sessions they had recently engaged with so the learning material is the same or similar to the formal content. The context, however, were quite different in that it did not have the structures or supervision provided in the formal contexts. Malcolm, Hodkinson & Colley (2003) describe informal learning contexts as “open-ended, with few time restrictions, no specified curriculum, no predetermined learning objectives, no external certification” (p. 315). The benefits of these informal encounters relate to the extension of the learning process beyond the formal context thus providing opportunities for interactions that deepen and enhance the levels of engagement with the curriculum content.

In the spiritual direction course, there was also the additional advantage of promoting awareness of the relational and non-cognitive elements of the learning process. This insight appears to run counter to the conclusions that Hoekstra and Korthagen (2011) arrived at when they acknowledged the need for the development of awareness of “feelings, beliefs, values, needs, images, and, most of all, their relationships with one’s behavioural tendencies” (p. 88). They went on to conclude, however, that “an informal learning context may not provide the

necessary triggers for such an awareness to emerge” (p. 89). Their observation, while inconclusive, does not correlate with the findings of this study which found that participants do engage in deep and meaningful interactions that include affective and cognitive aspects of their personal learning experiences in informal contexts. This may relate to the generation of the *participatory approach to safety* within the spiritual direction course discussed earlier in this chapter.

The findings indicate that participants in the spiritual direction course did share a breadth of dimensions of experience in their informal interactions. The interactions become an extension of the relational involvement in the formal aspects of the course. Due to the safety and confidentiality generated among participants in the formal settings, they are able to initiate in-depth conversations that include a range of experiential dimensions in the informal contexts.

This breadth of engagement in the informal as well as the formal learning contexts enables the participants to deepen their awareness of the range and subtlety of the perspectives each person brings to the learning process. The informal aspect of the interactions between participants is also significant in developing the skills for ongoing learning that relies on the ability to dialogue with others in the field. By initiating informal interactions, participants benefit from processing learning as it occurs rather than limiting it to the formal timetable. By capturing the moments of learning that may spontaneously arise, participants can take advantage of access to their peers to advance their learning.

The group dynamics experienced in the spiritual direction program go beyond the formal structures as defined by the curriculum and institutional expectations. The result is the promotion of learning beyond the limits of time and place. This produces a self-generating and highly efficient learning process in terms of formator and participant resources. The principles of spiritual direction practice do not operate on a time limited basis. Spiritual direction practice promotes ongoing reflection, discernment and awareness that extend beyond the face-to-face sessions. Therefore the learning process mirrors the principles that are being taught in the spiritual direction course.

5.4.4 Overview of the discussion of the community as learning context.

The learning community requires the development of an environment that encompasses the *protective, prescriptive* (Garraan & Rasmussen, 2014) and *participatory* approaches to safety. This involves the formators in providing leadership that contributes to the safety of

participants. Spiritual direction courses need to incorporate the provision of clear guidelines for participants that outline the frameworks and processes of confidentiality and safety. Participants also are responsible for recognizing their role as adults in the maintenance of safety and support of their peers in the process of sharing and engaging in critical feedback.

The role of diversity in the spiritual direction course is seen as significant in promoting the broadening perspective and worldview of participants in preparing them to work with a range of directees in their practice of spiritual direction. The bonding within the heterogeneous learning community also enhanced the ability of participants to learn through being challenged to go beyond their current views within a safe and supportive context.

The connectedness experienced by participants in the collegial, interactive approach to learning is identified with the unitive experiences that evoke deepening awareness of what is encountered in the learning process. Participants also experience openness to how others experience life and how this connects with their experiences both relationally and personally. The effects of connectedness in the group interactions are also seen to strengthen and deepen the relationships through experiences of empathy and compassion based on the level of intimacy generated by their experiences of unity.

Chapter 6 The Emerging Theory and its Implications

6.0 Introduction

The purpose of this study was to explore how participants perceived the factors that contributed to their formation as spiritual directors. This was to facilitate the identification of significant influences on participants' learning that would inform an emerging theory related to the learning processes and contexts associated with the formation of spiritual directors. Key elements, in particular learning approaches and contexts, were identified based on the experiences of participants. The influence of these elements on participants' learning was examined to construct a theoretical framework that contributes to the understanding of effective learning processes within a contemplative education model (Anderson, 2013). Previous scholarly research was drawn upon to identify aspects that correlated with or challenged the insights emerging from the findings.

6.1 Purpose and Context of Research

As outlined in Chapter One, the impetus for the study was in response to a significant growth of spiritual direction formation programs throughout the world. There was also interest in designing and implementing spiritual direction programs that effectively meet the learning and formation needs of the growing number of men and women seeking to train as spiritual directors within higher education contexts (Ruffing, 2011).

Based on the perception of the participants, four core categories were identified that related to guiding and promoting student learning. These categories were associated with the relational approaches to learning, the contemplative processes of learning, the role of the formators and the influence of the learning community in the learning process.

The categories were subjected to a rigorous analysis which drew on a review of the existing body of relevant literature. The exploration of a range of formation models associated with spiritual direction identified several current models of formation (Muto, 2011; Nicholson, 2014; Smith, 2014). These models outlined the way formators have conceptualized various approaches to formation from different perspectives. The significance of the collegial, interactive approaches in the broader scheme of relational approaches to

learning was identified as a key relational element in the learning process (Gunnlaugson, 2009).

The insights relating to contemplative approaches to education were analyzed from the perspective of participants in view of the existing literature (Eriksen, 2012; Kolb, 1984; Binz, 2008; Scharmer, 2009). These approaches were scrutinized to isolate key components in processing experiences within learning contexts with a view to comparing them with the core elements emerging from the findings. In so doing, a new theory became apparent as a result of this study.

Literature relating to the contextual issues of the role of formators and the learning community in the learning process was also studied to isolate the issues currently emerging in scholarly research. The survey of literature disclosed ongoing debate about the significance of the personal attributes of teachers (Cecero & Prout, 2011, 2014; Garzon, Hall, & Ripley, 2014) and their ability to model what they are teaching (Palmer, 2007). The relationship between teaching staff and students was also the subject of ongoing study to discern its impact on the ability of students to engage with the learning process (Hart, 2004). The study highlighted the significance of the relational impact of formators on participants in the learning process.

The exploration of factors related to the learning community within scholarly research revealed issues of safety (Boostrom, 1998; Wirth, 1997), diversity (P. Gurin, Dey, Hurtado, & Gurin, 2002; Hurtado, 2005) and cooperation (Hurtado & DeAngelo, 2012). These issues emerged as prominent factors in relation to the effective functioning of learning communities. Current debates about the appropriate approaches to safety within adult learning contexts were explored in relation to the participants' experiences within a diverse learning community (Garrahan & Rasmussen, 2014). Studies on the impact of diversity were also examined in relation to participants' experiences of difference within their learning communities (Mayhew, Wolniak & Parcarella, 2008). Findings related to cooperation and other relational factors within the learning community were also compared with studies addressing these aspects within other adult learning contexts (Colley, Hodkinson & Malcolm, 2007; Eraut, 2011).

The study drew on this literature in the process of analyzing the findings associated with the core categories and this contributed to establishing the relevance of the findings to broader contexts. To enable the data to be prepared for analysis in the findings, a research

framework was designed to guide the researcher in the processing of the various elements of study to identify an emerging theory. This approach to the research design is outlined below.

6.2 Approach to Research Design

An initial survey of existing literature related to spiritual direction formation learning processes and contextual issues concluded that there has been limited research in this area (Truscott, 2007). The choice of a methodology and subsequent research design was based on a need to develop theories and discern possible implications from the research data. The methodology chosen for the processing of the data drew upon the principles of classic grounded theory as originally outlined by Strauss and Glaser (1967).

This methodology was applied in conjunction with the epistemological considerations of constructivism, constructionism and social constructionism (Crotty, 1998). The application of each of these approaches involved a sequential process. *Constructivism* was identified in the process of participants' initial formulation of meaning as part of conceptualizing their experiences and insights (Breckenridge, Jones, Elliott, & Nicol, 2012). The epistemological expression of *constructionism* came into play when the researcher was working with the data provided by participants to construct meaning that reflected a shared understanding of the participants' experiences (Crotty, 1998). The social constructionist phase focused on relating the shared understanding of the participants' experiences to the broader body of literature and research to develop a collective set of meaning constructs (Anastas, 2012).

The theoretical perspectives of interpretivism (Orlikowski & Baroudi, 1991) in accordance with symbolic interactionism (Blumer, 1969) were employed to identify the manner in which the data was understood to relate to the findings that emerged. The interpretivist perspective supported the adoption of the participants' accounts of their lived experiences as data on which conclusions could be established. Based in the interpretivist perspective, symbolic interactionism affirmed the use of shared symbols of language and metaphor to convey the accounts of participants to the researcher. This perspective also enabled the researcher to enter into dialogue with other related research studies where shared symbolic language provided the basis for critical and analytical engagement.

Drawing on the classic grounded theory model and applying the perspectives of interpretivism and symbolic interactionism, the researcher employed in-depth, unstructured interviews with participants to gather the data. This approach to gathering data fits well with the principles of classic grounded theory by engaging in the process with an open agenda on

how the data are generated. This enabled participants to recount their lived experiences of the spiritual direction formation program with limited influence from the researcher's agendas and conceptual frameworks.

6.3 The Emerging Theory Based on the Findings

The study addressed four main research questions in relation to the spiritual direction formation program from the participants' perspective. They were:

- What factors contribute to the enhancement of participants' learning in a spiritual direction formation program?
- What effect do these factors have on the processes of learning within the formation program?
- How does the formators' role in the formation process contribute to the promotion of these factors?
- What influence does the whole learning community have on creating a context in which these factors affect to a diverse range of participants in formal and informal contexts?

Emerging from the data, four categories of findings were identified that included the relational approaches to learning, contemplative processes of learning, the influence of formators on learning, and the community as learning context. In examining these categories, a theoretical framework has been proposed that emerges out of the findings, i.e. from the ground up in grounded theory terms. The theoretical framework is explored in relation to the above four research questions.

6.3.1 Factors enhancing participants' learning.

The theory highlights the influence of the relational qualities of trust, openness, vulnerability and integrity expressed by all parties involved in the learning process to each other. The interplay between these dynamic qualities are conceptualised by this study as the *Participatory Engagement Theory* (PET) which describes the significant impact of relational qualities on participants' engagement in the participatory learning space. When these relational qualities are present in the interactions between those participating in the learning process, they experience a deepening emersion, expansion and extension of the participatory learning space between them. The absence of these relational qualities results in participants

withdrawing into defensive and reactive responses that limit their ability to engage deeply and fully with their peers in sharing personal insights and receiving critical feedback.

In contrast to other theories based on “teacher-centred”, “student-centred” or “subject-centred” (Palmer, 2007) approaches, the PET focus of learning was found to be centred in the space generated between those participating in the learning process. This learning space was observed to be a dynamic space influenced by the relational qualities that participants and formators exercised in their interactions and verbal exchanges within the learning process.

6.3.1.1 The impact of relational qualities.

The *Participatory Engagement Theory* (PET) focusses on the dynamic impact that the key relational qualities had on participants’ learning within the participatory learning space. The qualities of trust, openness, vulnerability and integrity among participants, their peers and formators were recognized as influencing the way the learning space functioned and impacted the participants’ learning.

From the study it became apparent that the trust that developed among participants was a significant factor in deepening the learning process of these adults undertaking a higher education course in spiritual direction formation. By developing trust in the process of collegial learning with each other, participants were more likely to engage deeply with their colleagues and formators in the learning space. Trust between the parties involved in the learning process promoted receptivity to acknowledge the personal experiences and perspectives of others. By trusting their peers and formators, participants were willing to listen to the personal insights of their peers which promoted a deeper level of engagement in the learning process.

However, trust on its own can result in passive receptivity that limits the participants’ engagement with the challenges of participating in the interactions involved in adult learning. There is a need for participants to express their own views and perceptions of what they are experiencing and thinking in the group interactions. This highlights the necessity for participants’ trust to be partnered with openness to share with others in the learning group what they are processing themselves.

Participants’ openness with each other was another key quality that built on the trust between them. Rather than just trusting others to express what was emerging in the learning space, participants discovered that their willingness to openly share and interact with colleagues in the learning process extended their learning. This involved them being open to

share personal and critical insights which broadened the learning experience for all parties. The participants' willingness to be open with each other contributed to enlarging the learning space by encouraging them to share more broadly some of their own affective, sensate, intuitive and spiritual dimensions of experience along with their cognitive insights. This enabled participants to explore a broader range of perspectives on the learning experiences. The openness also invited participants to be involved in an expanding learning space that enriched their learning opportunities.

In spite of the richness of trustfully receiving and openly sharing insights, there is the possibility that the group interactions can lead to participants hearing and sharing what they know will be affirmed and accepted within the group. To promote moving beyond the obvious, the known and the acceptable, participants need to be prompted to become vulnerable in taking risks to engage in the critical and creative venture of exploring and engaging with that which is unfamiliar and challenges the current limits of experience and knowledge. Vulnerability encourages participants to move beyond the limits of the comfortable learning space.

Participants experienced vulnerability as a key relational quality in their effective learning. This quality contributed to motivating participants to take risks and venture beyond the bounds of their own and others' expectations of what was acceptable in the learning space. This resulted in participants having space to explore the unexpected and unpredictable aspects of the learning process. Vulnerability has been seen to be a key factor in critical and creative exploration of new possibilities in the learning environment (Palmer, Zajonc & Scribner, 2010). By being open to take risks in experimenting with practice or offering unprocessed insights, participants provided alternative perspectives that encouraged all parties to consider options beyond the accepted norms of existing knowledge.

Taking risks to go beyond the accepted limits of the groups understanding can result in random and undisciplined speculation that distracts participants from grounding their learning in the reality of everyday living and practice. This calls for the need for integrity which is the quality that promotes the integration of the outcomes from trusting others input, openly sharing one's own views and taking risks in exploring beyond the limits of the current understanding of the group.

The integrity of participants in group interactions was observed as integrating the preceding qualities trust, openness and vulnerability in the learning space. The promotion of

integrity within the learning group encouraged participants to listen to and respect others' perspectives that allowed them to inform participants' learning and formation. This contributed to the ability of participants to take a more holistic approach in assimilating what they were learning with their ongoing practice. The integrity of participants created a context in which trust, openness and vulnerability came together in synchronicity to blend the relational qualities into a process that multiplied the effect of each quality beyond its own ability to contribute to the learning space and process.

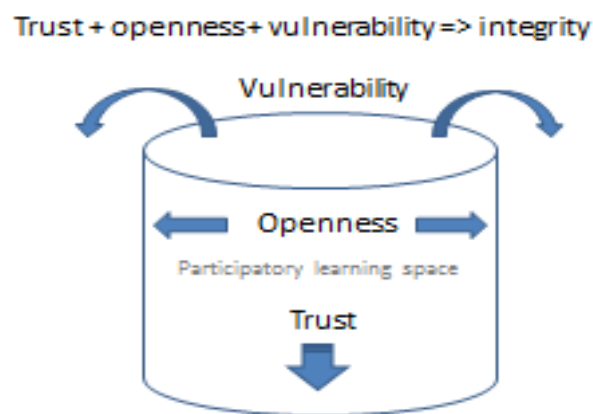


Figure 6.1. The dynamic impact of the *Participatory Engagement Theory* on the participatory learning space.

The overall effect of these qualities working in concert with each other was to create an ever expanding *participatory learning space* that contributed to a holistic approach to learning for participants. The impact of these qualities of relationship is captured in Figure 6.1 which provides a visual representation of how the dynamic influence of the qualities of relationships as expressed in the *Participatory Engagement Theory* (PET) impacts the *participatory learning space*.

6.3.1.2 The dynamic nature of the participatory learning space.

Associated with the expression of personal qualities among participants was the promotion of the participatory learning space as a place of mutual exchange. This was in contrast to understanding the learning space as solely a venue for the acquisition of others' insights and knowledge.

Flowing out of the application of the relational qualities within the shared learning space, participants came to see their involvement in the learning process as a form of

hospitality. By adopting this stance, participants were encouraged to actively participate in contributing their insights as well as valuing the contributions of others. This perspective generated a level of good-will among participants where they felt valued while appreciating others' involvement in the learning process. The contribution of the qualities of trust, openness and vulnerability enabled participants to engage more readily in the interchanges that were generated in the participatory learning space.

The insights gleaned from the data supports the *Participatory Engagement Theory* that the relational qualities, when applied within a *participatory learning space*, are pivotal in enhancing participants' ability to learn from each other, their formators and their own reflections.

Based on the application of the relational qualities, the participants identified with several procedural aspects associated with contemplative approaches to learning that worked in concert with these qualities to assist participants in their learning. These aspects are explored in the following section in relation to the *participatory engagement theory* associated with the qualities that defined participants' interactions.

6.3.2 The effect of relational factors on the processes of learning.

The principles of the *Participatory Engagement Theory* focussed on the relational qualities outlined in the previous section influenced several aspects in the learning process. These aspects were associated with the elements identified in the second core category. They included the impact of the time taken to reflect on experiences, the breadth of dimensions of experience, the critical feedback offered in the process and the ability to integrate the analytical and reflective aspects of the learning process. The impact of the relational qualities of trust, openness, vulnerability and integrity on these elements are explored in this section to establish the influence of relational qualities on the learning process.

By taking time to reflect, participants were able to get in touch with deeper and broader aspects of their experience which influenced their approach to learning. These included the affective, cognitive, intuitive, sensate and spiritual dimensions of experience. When they were able to trust each other enough to openly share the deeper and more personal aspects of their experiences, participants observed that their learning was enhanced. The effect of trusting each other was that they were able to take risks and be vulnerable. This was expressed in participants openly sharing their inner personal reactions and responses which contributed to them integrating their learning more readily into their practice. Their trust in

each other also extended beyond personal sharing to being willing to be challenged and to engage critically with each other. The willingness to be vulnerable both in offering critical feedback and receiving it, enabled participants to go beyond the limits of safe comfortable learning processes to explore new horizons and perspectives in relation to their awareness and practice.

The faith that participants developed in the group's integrity in relation to personal disclosures was very significant. They reported that they felt able to integrate analytical, cognitive processes with other more personal dimensions of their experiences. This generated a more holistic awareness of the relevance of their learning to their practice as spiritual directors. This resonates with aspects of the *Theory U* process which calls on participants, in corporate contexts, to approach discernment with an open mind, an open heart and an open will (Scharmer, 2007). The open integration of cognitive (head), affective (heart) and motivational (will) insights within the learning process allows for a more grounded engagement with all experiences.

Two models of collective processing of learning are identified as contributing to participants' ability to learn from their experiences. They were the *Lectio Divina* and *Theory U* models of contemplative processing of learning experiences. Both models rely on the principles of trust, openness, vulnerability and integrity to enable participants to collectively benefit from the processes of deepening awareness and broadening perspectives in relation to experiences within discernment and learning.

The principles of *Lectio Divina* (Binz, 2008) bring to the process a particular focus on the initial stages of engaging with experiences in learning contexts. The *Lectio Divina* model focusses on noticing experiences without becoming preoccupied with trying to analyse them. Having reflected deeply or meditated on the experiences, the third *Lectio Divina* stage of *oratio* enables participants to engage in expressing what has emerged out of their reflection during the meditative stage. The fourth stage, *contemplatio*, proposes entry into contemplatively processing the resources that have emerged out of the preceding stages with a view to becoming aware of what insights are generated in the process.

In the contemplative process of learning, the *Theory U* model (Scharmer, 2007) offers further insights and guidelines that clarify the essence of the contemplative stage of the *Lectio Divina* approach to learning. The *Lectio Divina* model suggests an open and trusting stance to entering the contemplative stage of the process. More specifically, the *Theory U*

model details steps taken to prepare participants to enter into the contemplative stage of the process which Scharmer (2007) referred to as *presencing*. These steps incorporate processes of suspending personal agendas and insights previously formed during the initial stages of the process as outlined in the first three stages of the *Lectio Divina* process. This suggests an openness to take risks in not controlling the process so that the participants can more readily discover new insights and possibilities out of the process. The step of *letting go* as outlined in the *Theory U* process implies a willingness of participants to trust the process and each other in being willing to open their minds, hearts and wills to whatever the learning process invites them to notice. The intention is not to eliminate or dismiss previous insights but to clear the way for participants to be open to take risks and be vulnerable in broaching new and unforeseen insights and discoveries through the process of contemplation. These additional steps prepare for learning by clarifying and informing the fourth stage of *contemplatio* in the *Lectio Divina* process.

As outlined in the findings, the qualities of trust, openness, vulnerability and integrity contributed to the expanding and deepening of the shared participatory learning space. This occurred through participants becoming more openly aware of the various dimensions of experience, trusting each other to take a risk in engaging in critical feedback and integrating their insights into their practice as spiritual directors. The combination of the *Lectio Divina* and *Theory U* models suggests a theoretical framework in which the principles of the *Participatory Engagement Theory* become a significant factor in advancing the learning process for participants. The relational qualities of trust, openness, vulnerability and integrity combine together to enhance the learning process associated with these models.

As well as the procedural aspects of learning, there were contextual elements that emerged from the findings that relate to the influence of the relational dynamics associated with the *Participatory Engagement Theory*. They related to the role of formators in the learning process and the impact of the learning community on participants' learning. The first, the contribution of formators in the promotion of trust, openness, vulnerability and integrity, is discussed below.

6.3.3 The contribution of formators in the promotion of these factors.

The ability of formation team members to hold the balance between open vulnerability, as discussed in previous sections, and leadership has been identified as a key attribute of formation team members in relation to participants' learning. One of the key aspects of the

findings that emerged was the formators' modelling of the observed relational qualities, associated with the *Participatory Engagement Theory*, evident between all parties – participants and formation team members – in the learning space.

The discussion of findings highlighted the way formators were active in modelling the qualities of trust, openness, vulnerability and integrity both in their interactions with each other and their involvement with participants in the course. This modelling contributed to participants embracing these qualities for themselves in their interactions in the program.

The formation team members demonstrated the application of these qualities through their ability to lead in a non-hierarchical manner. This approach by formators contributed to the generation of the trust and openness of participants to engage in the learning process without having to rely solely on them as formators. The qualities that participants also identified in formators was their ability to take risks and be vulnerable in allowing the participants to more actively contribute to their own exploration and learning. These attributes of openness and vulnerability implied that formators were willing to work in partnership with participants particularly in the unpredictable and exposed environments of the unfamiliar learning contexts.

The discussion of findings indicated that it is not enough for formation team members to articulate the principles and theory related to spiritual direction practice. There was also the necessity for formation team members to model the qualities that enhance the processes of learning in their own engagement with the learning processes within the course. This extended beyond just demonstrating approaches to learning. Participants needed to see firsthand how formation team members engaged in their own processes of learning by applying the qualities of trust, openness, vulnerability and integrity as part of the formal learning processes.

The manner in which formators modelled collegial trust, openness, vulnerability and integrity was significant in that they did not compromise their responsibilities as guardians and authorities within the learning context. The formators were seen to maintain a safe holding environment within the learning space and guide participants into establishing accountability frameworks that provide clear boundaries particularly around confidentiality. This observation supported the notion that the application of the principles of the

Participatory Engagement Theory involving the qualities of trust, openness, vulnerability and integrity operate in conjunction with other contextual factors in enhancing learning.

Formators reinforced the shared expectations of the learning community by modelling the relational qualities that contributed to extending the learning processes. This occurred by enabling participants to move beyond the rigidity of fixed boundaries and expectations to engage in shared exploration based on trusting each other and being open to take risks as demonstrated by the formators.

Such shared risk taking raises the issue of safety in this process and the impact of the relational qualities on the maintaining a safe learning community. The following section explores the influence of the quality of relationships on the generation of safety among participants in the learning process.

6.3.4 The influence of the quality of relationships on the learning community.

The relational qualities associated with the Participatory Engagement Theory were also significant contributors to the development of a safe, diverse and cooperative learning community in which participants felt able to fully participate. Three approaches to safety were identified in the discussion of Category Four of the findings that were relevant to the spiritual direction formation program. The *protective* approach was seen to be appropriate in the process of initially engaging with participants in laying the foundations for safety in sharing personal experiences. The *prescriptive* approach contributed to the establishment of the ground rules in the early phase of formation, particularly in the development of a shared understanding of confidentiality. The *participatory* approach to safety, however, ultimately created an environment in which participants both owned and contributed to the maintenance of a safe and trusted learning community.

The significance of relational qualities of trust, openness, vulnerability and integrity in the generation of the *participatory approach to safety* related to the influence these qualities had on participants taking ownership of safety in the learning process and space. By trusting each other and the formators, participants no longer needed to rely on the formators to feel safe with each other. This resulted in participants becoming more open to engage with each other. As a result they discovered that even though they came from different backgrounds and

held differing views they still felt free to take risks in openly sharing their insights and personal views and critiquing each other without feeling compromised.

The emergence of the *participatory approach to safety* meant that the formator's role in maintaining safety shifted from being responsible for guarding and implementing safety, as implied in the *protective* approach to safety, to participating in the learning process themselves. Participants also came to experience a shift from looking to formators to protect or control the process to taking more responsibility for their mutual protection of each other. This contributed to both relieving formators of the need to constantly manage the learning environment and empowering participants to take responsibility for the maintenance of safety within the learning community. This approach also prepared participants to apply the principles of participatory approaches to safety in their informal exchanges and interactions which naturally extended the learning process safely beyond the formal structures of the course. These are contexts where formators were normally not present to regulate or maintain the safety of the group. This resulted in the participants benefitting from the opportunity to engage in learning in these informal contexts over meals and meeting as peer groups in settings while maintaining the safety for group participants themselves.

The trust and openness generated in the formal learning contexts enabled participants to experience the development of cooperative relationships through the modelling of such relational qualities in the informal interactions that occurred beyond the structured program.

6.3.5 Summary of the emerging theory.

The discussion of findings has examined four categories related to the role of experience in learning, contemplative processes of learning, the role of formators in the learning process and the impact of the community on learning. Emerging from these categories are insights that informed the *Participatory Engagement Theory*, discussed in the previous section.

Central to effective spiritual direction formation programs is an emphasis on the relational qualities of trust, openness, vulnerability and integrity that participants share within the participatory learning space. This suggests a move away from “teacher-centred”, “student-centred” or “subject-centred” approaches (Palmer, 2007) to a focus on what happens between participants when the relational qualities are enacted among all participants and their

formators in the learning space. The relational qualities are seen to influence the manner in which participants process their experiences in the learning space and the dynamic impact these qualities have on the expansion and extension of participatory learning space.

By applying the relational qualities in their time to reflect, participants experience a deepening of their awareness of the various dimensions of their learning experiences. This occurs when they are able to trust each other enough to share openly the affective, sensate, cognitive, intuitive and spiritual aspects of their experiences. In taking risks and being vulnerable in challenging and critiquing one another, participants provide critical feedback that contributes to them integrating their insights into their practice as spiritual directors.

Modelling of the relational qualities by formators promotes the adoption of these qualities by participants. Formators' modelling of the qualities also reinforces the understanding that they are part of the learning environment with participants as colleagues in the process. By maintaining their authority, the formators provide a safe environment for participants to develop these relational qualities in their interactions with each other.

Due to the qualities of relationship in the interactions between participants, the generation of safety within the learning community extends beyond the *protective and prescriptive* approaches to safety initiated by the formators. The qualities of relational engagement contribute to the development of a *participatory* approach to safety that is not solely reliant on the formators to maintain the safe environment. By maintaining the qualities of trust, openness, vulnerability and integrity, participants experience the *participatory* approach to safety in their interactions beyond the formal learning contexts where formators are not present to govern the space.

6.4 Implications from Participatory Engagement Theory

The implications arising from the *Participatory Engagement Theory* discussed in the previous sections include: the development of group frameworks for authentic engagement; the development of contemplative models of processing experiences; the selection criteria for formation team members; and the development of a safe, diverse and cooperative learning community. These implications are viewed in the light of their possible application within spiritual direction formation programs and other higher education contexts.

6.4.1 Implication 1: The development of group frameworks for authentic engagement.

Intentionally focussing on the promotion of the qualities of trust, openness, integrity and vulnerability among participants as outlined in the *Participatory Engagement Theory* will contribute to deepening, broadening, expanding and integrating participants' engagement within the learning space. The awareness of the learning space among participants shifts the focus of learning away from either *teacher-centred* or *student-centred* learning to a more *community-centred* or *participatory* approach to learning. The focus on the participatory learning space promotes a mutual sharing of experiences and insights consistent with the collegial, interactive approaches that maximize participation by all parties in the learning process.

6.4.2 Implication 2: Development of contemplative models of processing experiences.

The application of the relational qualities in line with the *Participatory Engagement theory* operates within experiential learning models to enhance their application. The two models that this study identified as relevant to spiritual direction formation were *Lectio Divina* and *Theory U*. The researcher has argued that neither of these models are adequate on their own to inform the learning processes involved in the formation of spiritual directors. When they function in association with the principles of the *Participatory Engagement Theory*, the impact of the relational qualities that participants bring to the process contribute to the combined elements of *Lectio Divina* and the *Theory U* models (See Figure 6.2) enhancing the contemplative approach to learning.

This study identifies the combined model as the *Participatory Reflective Learning Model* (PRLM) which draws on the preliminary stages outlined in the *Lectio Divina* approach combined with the detailed steps associated with the *Theory U* approach to contemplation. The development of the *Participatory Reflective Learning Model* in association with the principles of the *Participatory Engagement Theory* promotes the intentional engagement of participants in approaching the crucial stages of group contemplative processing by applying the qualities of trust, openness, vulnerability and integrity. The *Participatory Reflective Learning Model* outlines a continuous process that guides participants' reflection on

experiences from the shared perspective by exploring ways in which emerging insights can be applied within the learning process and beyond.

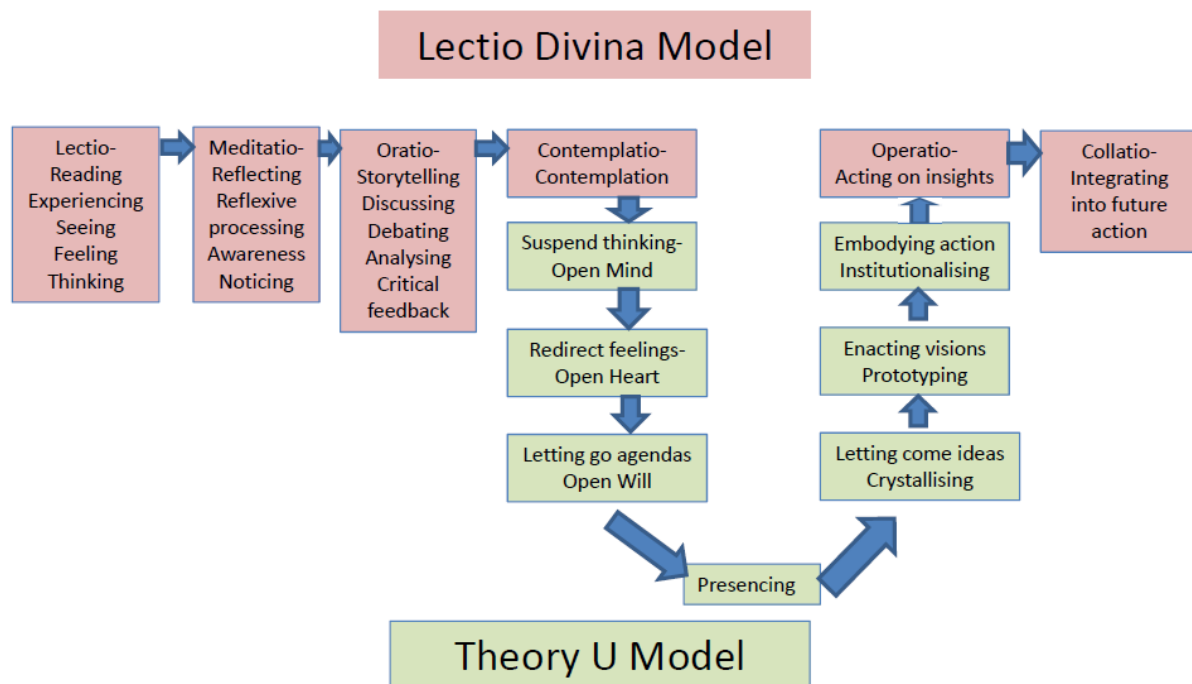


Figure 6.2. The Participatory Reflective Learning Model (PRLM).

The researcher suggests that program designers and formators apply a PRLM approach to processing learning experiences. This would best be done in conjunction with principles associated with PET that promotes trust, openness, vulnerability and integrity as foundational to the participant engagement in contemplative educational approaches to learning.

6.4.3 Implication 3: Selection criteria for formation team members.

The *Participatory Engagement Theory* acknowledges the need for specific personal and practical criteria to be identified in guiding program directors and training centres in their appointment of formation team members. Key areas of consideration for determining the criteria for the selection of formation team members relate to the *Participatory Engagement Theory* and include the ability to instil trust in participants so that they are willing to be open and vulnerable as learners. This requires formation team members to demonstrate an ability to model these qualities in both learning and spiritual direction practice. They also need to recognize their partnership with participants in applying the relational qualities in the way they lead participants in learning.

Potential formators also need to maintain their authority in providing a safe and conducive environment for learning while openly and vulnerably engaging with participants in the learning process. This requires candidates who exhibit a balance of meekness and self-esteem that potentially enable them to engender trust with participants and openly share and be vulnerable in the process.

6.4.4 Implication 4: The development of a safe, diverse and cooperative learning community

The adoption of the associated theoretical frameworks of the *Participatory Reflective Learning Model* in conjunction with principles of the *Participatory Engagement Theory* implies that formation team members recognize the range of approaches to safety that relate to different aspects of the learning process. Being familiar with the *protective, prescriptive and participatory* approaches to safety, formation team members need to be familiar with these approaches and be able to apply them in a manner that is appropriate to the participants' stages of development and nature of the interactions. Formators also need an awareness of the contribution of the relational qualities of trust, openness, vulnerability and integrity to the generation of safety in a group.

The relevance of the relational qualities in the promotion of engagement with diversity in the learning group requires intentional attention in breaking down the barriers that inhibit learning. Participants need to be encouraged to take risks in engaging with differing perspectives within the safety of the formation program.

The development of *participatory approaches to safety* among participants would provide them with a model of safety that can be applied within informal contexts in which they can develop cooperatively in their ongoing learning. The significance of promoting this approach to safety within the formal structures of a course relates to the benefits of applying it in informal interactions where formators are not necessarily present. The development of informal gatherings beyond the course modelled on the relational dynamics within peer groups provides avenues to develop the relational qualities, associated with the Participatory Engagement Theory, that contribute to participants' learning beyond the completion of the formal course program.

6.5 Research Limitations and Delimitations

This research project was limited to the study of a spiritual direction program within a particular centre for spirituality from the participants' perspective. The selection of

participants for interviewing was restricted to recent graduates and current final year participants in a spiritual direction formation program at the time of data collection. This group was chosen to reflect recent expressions of the learning processes within the formation program. There was also an understanding that they would more readily recall their experiences due to the relatively short time between when they studied and the interviews.

The study also was delimited to examining the learning processes and contextual issues relating to participants' experiences of the formation program. In the analysis of the data and the establishment of the findings, curriculum content and spiritual direction traditions were not directly addressed in the study and neither were aspects relating to personal learning styles. The central focus of the research was on how participants experienced the learning processes and the learning context and how these factors influenced them in their formation as spiritual directors.

6.6 Recommended Further Research

The limitations and delimitations of this study leave room for further research related to the formation of spiritual directors. These include:

1. The exploration of relational and contemplative processes of learning in other spiritual direction traditions in which a different emphasis is applied to core elements of the formation program. This would assist in establishing whether the principles identified in this study apply beyond the current spiritual direction program.
2. An identification of formators' perceptions of effective approaches to learning in spiritual direction formation programs would provide another comparative perspective in relation to the findings of this study which were based on participants' perceptions.

6.7 Concluding Remarks

This study has explored a spiritual direction formation program in a higher education context through the perceptions of its participants. Applying the principles of classic grounded theory (Strauss and Glaser, 1967), the data generated by participants has been analysed to identify categories of findings which have contributed to the development of a theory about the impact of relational qualities on different approaches and contexts on participants' learning.

Based on the data, the researcher developed a *Participatory Engagement Theory* (PET) that describes the principles of effective participant involvement in the learning based on the

qualities they bring to the process. The formation of spiritual directors is generally based on a contemplative approach to learning that is grounded in collegial, interactive approaches to engaging in the learning environment and beyond. The *Participatory Engagement Theory* focuses on the relational qualities of trust, openness, vulnerability and integrity experienced among participants and their formators within the spiritual direction formation program. The theory affirms that engagement with these relational qualities promotes deep and extended learning through their application within the participatory learning space.

The study contends that spiritual direction programs need to be built around these relational qualities within group interactions. By applying these relational qualities associated with the *Participatory Engagement Theory* within the *Participatory Reflective Learning Model* (PRLM), participants maximise the benefits to their learning through clear structured approaches to processing their learning experiences at increased depth and breadth.

Formators' ability to model the relational qualities contributes to participants' adoption of them in their own learning and spiritual direction practice. Participants' application of these relational qualities within *protective and prescriptive* approaches to safety enables them to contribute to the development of *participatory* approaches to safety within the learning community. This assists participants to develop an ownership of safety in the group contexts and empowers them to participate more fully in the learning process. The *participatory* approach also provides opportunities for participants to apply its principles beyond the formal learning contexts where formators are not present to protect or guide the process. This opens the way for participants to interact and learn together in informal contexts and encourages cooperation and connectedness among participants that contributes to the extension of the learning beyond the formal limits of the course.

This study provides a foundation on which the *Participatory Engagement Theory* and the *Participatory Reflective Learning Model* are established. By applying the principles of the *Participatory Engagement Theory* in association with the *Participatory Reflective Learning Model*, the instigators and designers of spiritual direction formation and other adult learning programs promote deeper and broader engagement with a clearly structured learning process that enhances participants' learning. When formators are able to model the principles of the *Participatory Engagement Theory*, they encourage participants to more actively embrace and engage with the relational qualities in their interactions within the learning space.

The study also identifies the concept of *participatory approaches to safety* to distinguish this from the *protective and prescriptive approaches* (Garraan & Rasmussen, 2014) which are more commonly applied within adult learning contexts. The impact on safety for participants of applying the relational qualities results in the creation of a *participatory approach to safety* that extends beyond the limits of *protective and prescriptive approaches* to be applied by participants within and beyond the formal learning context.

The *Participatory Engagement Theory* lays the foundations for the design of programs that encourage participants to actively and safely engage in learning within adult higher education environments.

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Appendices

Appendix A: Information letter to Board and Director – WellSpring Centre.

Appendix B: Information letter to participants in the interviews

Appendix C: Consent letter for participants in the interviews

Appendix D: Interview Protocol

Appendix E: Category distribution in initial responses

Appendix F: Introductory statement prior to interview

Appendix G: Sample prompting questions for in depth interviews

Appendix H: Final statements following the interview

Appendix A

INFORMATION LETTER TO THE BOARD AND DIRECTOR – WELLSPRING CENTRE

PROJECT TITLE: An investigation of the impact of a curriculum program on the formation of spiritual directors.

PRINCIPAL SUPERVISOR: Dr. Michael T Buchanan

STUDENT RESEARCHER: Rev. Peter S Bentley

STUDENT'S DEGREE: Doctor of Philosophy

The Board and Director of the WellSpring Centre

WellSpring Centre

PO Box 300

Ashburton

Victoria 3147

Dear

I write to formally seek permission to write a letter of invitation to the current participants and graduates of the Art of Spiritual Direction formation programme to participate in a research project which investigates the impact of a curriculum program on the formation of spiritual directors.

The research project explores the various components of curriculum development in the spiritual direction formation program. The insights from the current participants and graduates who have trained in the spiritual direction formation program will be drawn upon to investigate the impact the spiritual direction curriculum has had on their development and

practice as Spiritual Directors. Unstructured in depth interviews will be utilized to gain insights into the perspectives of participants who have participated in a spiritual direction formation program.

This project, which is being conducted by Peter Bentley, will form the basis for the degree of Doctor of Philosophy at Australian Catholic University under the supervision of Dr. Michael T Buchanan.

With your permission I intend to write to each potential participant identified by you and invite them to participate in the aforementioned study. I have attached a copy of the letter of invitation and consent form for your reference.

Participation in this study is completely voluntary. Participants can withdraw from the study at any time without adverse consequences.

One of the expected benefits of the study is that it will provide the WellSpring Centre primarily and other spiritual direction formation programs subsequently with researched evaluations and proposed theories of the curriculum of the spiritual direction formation program that can be applied to future course design. We also hope that the research project will help to provide information that will help shape changes to the current formation program.

The study will be published as a thesis for assessment and results from the study may be summarized and used at conference presentations and appear in publications. All respondents will receive feedback of the results of the research and they are assured that their participation in this research will not be identified.

If you have any questions regarding this project you should direct them to the Principal

Supervisor:

Dr Michael T Buchanan,

Faculty of Education, Australian Catholic University, St Patrick Campus,

(61) 39953 3294

Michael.Buchanan@acu.edu.au

I will also appreciate it if the letter of invitation to the potential participants be sent from the WellSpring Centre to ensure that I do not have to request access to the students' details as part of this project.

I look forward to working with you in providing some helpful insights into the design of future spiritual direction formation programs at WellSpring and beyond.

Thanking you in anticipation.

Yours sincerely,

Peter Bentley

Research Student

Appendix B

INFORMATION LETTER TO PARTICIPANTS

PROJECT TITLE: An investigation of the impact of a curriculum program on the formation of spiritual directors.

PRINCIPAL SUPERVISOR: Dr. Michael Buchanan

STUDENT RESEARCHER: Peter Bentley

STUDENT'S DEGREE: Doctor of Philosophy

Name of participant

Address of participant

Dear *(first name of participant)*,

You are invited to participate in a project which examines the curriculum design of the spiritual direction program at the WellSpring Centre and how it impacts participants in their formation as spiritual directors.

What is the project about?

I intend to document the various aspects of curriculum design and implementation of the spiritual direction formation programme in which you have participated. This is planned to develop a theory that will inform the ongoing develop of spiritual direction formation programs to more effectively form spiritual directors in their personal development and professional practice.

Who is undertaking the project?

This project is being conducted by Rev Peter Bentley and will form the basis for the degree of Doctor of Philosophy at Australian Catholic University under the supervision of Dr. Michael T Buchanan.

Are there any risks associated with participating in this project?

It is anticipated that there will be no foreseeable risks. However, every endeavor will be made to ensure confidentiality and personal safety is ensured. All personal details will be coded to protect your identity and contribution to the project and any identifiable locators will be removed from the transcripts.

What will I be asked to do?

If you agree to be part of this project, you will be interviewed in a one on one situation and the interview will be digitally recorded as an audio record. The interview format will be an unstructured format to enable you to comment on the research topic as freely as possible. The researcher will have some guiding questions should the conversation depart from the focus of the research. You will be asked to reflect on your experience of the spiritual direction formation program and how it has impacted your formation as a spiritual director. The researcher will be asking you to be specific about what aspects of the program contributed positively or adversely to your formation. The researcher may invite you to a further interview if further information or clarification of your contributions is required.

The initial interviews will take approximately three quarters of an hour and will be carried out at the WellSpring Centre or at a mutually convenient location.

What are the benefits of the research project?

This project offers you an opportunity to present your perspectives on the spiritual direction formation programme. It will also provide an important record for the WellSpring community in relation to the curriculum of the formation programme and make a significant contribution to understanding the process of training and forming spiritual directors. The project will propose ways in which the design and implementation of the formation programme curriculum could be facilitated to improve training outcomes.

Can I withdraw from the study?

Participation in this study is completely voluntary. You are not under any obligation to participate. If you agree to participate, you can withdraw from the study at any time without adverse consequences. You will be free to do so without any constraints. You will not be

required to give a reason for withdrawal. You do not have to justify your decision, and can withdraw your consent to any recorded conversations being used in the project. However, once the data has been processed into a form that removes identifying markers, it will not be possible to withdraw recorded or written material.

Will anyone else know the results of the project?

The study will be published as a PhD thesis and in peer reviewed journals. As noted above the data will be stored in a form that is unidentifiable. Where identifiable markers are present the researcher will ensure that these are coded to ensure confidentiality. The data from the study will be held in confidence and stored in secured locations in the Faculty of Education at the Australian Catholic University in Melbourne.

Will I be able to find out the results of the project?

The results of the project will be published in a thesis and peer reviewed journals and you will be notified when these publications become available.

Who do I contact if I have questions about the project?

If you have any questions about the project you can contact me or my supervisor using the following contact details. My email address is peter.bentley@wellspringcentre.org.au. Alternatively, you may also wish to contact my supervisor Dr. Michael Buchanan, Senior Lecturer, School of Religious Education, Faculty of Education, Australian Catholic University (Phone: (03) 9953 3294, Email: Michael.buchanan@acu.edu.au).

What if I have a complaint or any concerns?

The study has been approved by the Human Research Ethics Committee at Australian Catholic University (approval number 2013 xxxx). If you have any complaints or concerns about the conduct of the project, you may write to the Chair of the Human Research Ethics Committee care of the Office of the Deputy Vice Chancellor (Research).

Chair, HREC

c/o Office of the Deputy Vice Chancellor (Research)

Australian Catholic University

Melbourne Campus

Locked Bag 4115

FITZROY, VIC, 3065

Ph: 03 9953 3150

Fax: 03 9953 3315

Email: res.ethics@acu.edu.au

Any complaint or concern will be treated in confidence and fully investigated. You will be informed of the outcome.

I want to participate! How do I sign up?

If you agree to participate in this project, you should sign both copies of the Consent Form. Please retain one copy for your records and return the other copy to me.

I look forward to your participation in this project,

Peter Bentley

Dr Michael Buchanan

Student Researcher

Principal Supervisor

Appendix C

CONSENT FORM (Participants copy)

TITLE OF PROJECT: An investigation of the impact of a curriculum program on the formation of spiritual directors

PRINCIPAL INVESTIGATOR: Dr Michael T Buchanan

STUDENT RESEARCHER: Rev Peter S Bentley

I have read and understood the information provided in the Letter to Participants. Any questions I have asked have been answered to my satisfaction. I agree to participate in this hour long interview which will be audio taped, realising that I can withdraw my consent at any time without adverse consequences. The interview will be aimed at establishing what impact the curriculum program has had on your formation as a spiritual director and what aspects of the program contributed most to your formation. I agree that research data collected for the study may be published or may be provided to other researchers in a form that does not identify me in any way.

NAME OF PARTICIPANT:

SIGNATURE **DATE**

SIGNATURE OF PRINCIPAL INVESTIGATOR:

DATE:.....

SIGNATURE OF STUDENT RESEARCHER:

DATE:.....

Appendix D

Interview Protocol

Introductory statement

Thank you for giving of your valuable time for this interview.

The interview will go for about 45 mins and you are free to stop at any point during the interview or take a break.

The interview will be recorded in written form as notes of the interview. It will also be audibly recorded on a recorder and transcribed in full. All identifying references to yourself or anyone you may refer to will be coded so as to ensure confidentiality. The transcripts, recordings and notes will all be kept in locked storage within ACU education dept. and digitally on a secure computer.

The research is focused on establishing an understanding of what are the most effective approaches to spiritual direction formation in a curriculum program. So we are not primarily focused on critiquing the program as identifying the factors that you found most helpful in your formation as a SD and what you found did not assist you. We are also interested in what was missing from the program that in retrospect may have helped you in your formation as a Spiritual director.

The interview is an unstructured interview which means you are free to set the agenda of what you share and what you respond to. There are no right or wrong answers in these interviews.

Because I will be transcribing the interview, it would be good if we can keep responses as short as possible and focused on the formation program content and methods. We would like to avoid personality issues however if the characteristics of teaching staff or fellow participants were contributing factors to your formation please feel free to raise these.

Do you have any questions about the process?

The research subject

An analysis of the impact a curriculum programme in spiritual direction had on the formation of spiritual directors from the perspective of the participants.

The aims of the study were:

- a) To study the perspectives of participants involved in formation in relation to the effectiveness of a curriculum programme on their formation as spiritual directors.
- b) To identify factors within the curriculum programme that enriched and/or limited the participant's formation as spiritual directors.
- c) To analyse the theory generated from research questions against existing knowledge about curriculum design in education.
- d) To propose some recommendations for future directions and practices concerning the design of curriculum in spiritual direction formation programs.

Sample questions for in depth interviews

- a) In what ways has the spiritual direction formation programme been relevant to your formation as a spiritual director?
- b) What have been significant components of the formation program for you in shaping your spiritual direction practice?
- c) How have these aspects of the formation program fostered your development as a spiritual director?
- d) What aspects of the program were not helpful in your development as a spiritual director, if any?
- e) What aspects of spiritual direction practice or theory, relevant to your practice as a spiritual director, were not covered in the formation program?
- f) What changes would you like to see that would contribute to your professional and personal growth as a spiritual director within the formation program?

Final Statement

Your contributions to this research project are invaluable in enabling us to identify the key factors that will inform the curriculum design of future formation programmes and related learning situations.

We will endeavour to keep you informed of the outcomes of this research and let you know where you can read about the findings of this research.

Do you have any questions at this point?

Thank you again for making yourself available for this interview.

Appendix E

Table of category distribution in initial responses

Category	Number of References	Sub Category	Number of References
Previous experience	14		
		Spiritual direction	4
		Personal life	6
		Professional	4
Approaches to learning	43		
		Reflection and analysis	17
		Experience and expression	16
		Critical feedback	10
Teachers roles	24		
		Modelling	16
		Open and vulnerable	
		Safe and supportive	3
		Co-learners	3
		<i>Diverse members (not identified in main categories)</i>	2
Community	41		
		Safety and trust	10
		Diversity	5
		Modelling SD	9
		Cooperative	17
Time to reflect	21		
		Slowing down	9
		Awareness of affective	
		Reflexive and reflective process	7
		Deepened self-awareness	5

Transformative	5		
		Dissonant experience	1
		Unexpected shift	2
		Expanding perspective	1
		Evidence of change	1

Appendix F

Introductory statement prior to interview

Thank you for giving of your valuable time for this interview.

The interview will go for about 45 mins and you are free to stop at any point during the interview or take a break.

The interview will be recorded in written form as notes of the interview. It will also be audibly recorded on a recorder and transcribed in full. All identifying references to yourself or anyone you may refer to will be coded so as to ensure confidentiality. The transcripts, recordings and notes will all be kept in locked storage within ACU education department and digitally on a secure computer.

The research is focused on establishing an understanding of what are the most effective approaches to spiritual direction formation in a curriculum program. So we are not primarily focused on critiquing the program as identifying the factors that you found most helpful in your formation as a SD and what you found did not assist you. We are also interested in what was missing from the program that in retrospect may have helped you in your formation as a Spiritual director.

The interview is an unstructured interview which means you are free to set the agenda of what you share and what you respond to. There are no right or wrong answers in these interviews.

Because I will be transcribing the interview, it would be good if we can keep responses as short as possible and focused on the formation program content and methods. We would like to avoid personality issues however if the characteristics of teaching staff or fellow participants were contributing factors to your formation please feel free to raise these.

Do you have any questions about the process?

Appendix G

Sample prompting questions for in depth interviews

- a) In what ways has the spiritual direction formation program been relevant to your formation as a spiritual director?
- b) What have been significant components of the formation program for you in shaping your spiritual direction practice?
- c) How have these aspects of the formation program fostered your development as a spiritual director?
- d) What aspects of the program were not helpful in your development as a spiritual director, if any?
- e) What aspects of spiritual direction practice or theory, relevant to your practice as a spiritual director, were not covered in the formation program?
- f) What changes would you like to see that would contribute to your professional and personal growth as a spiritual director within the formation program?

Appendix H

Final statements following the interview

- Your contributions to this research project are invaluable in enabling us to identify the key factors that will inform the curriculum design of future formation programs and related learning situations.
- We will endeavour to keep you informed of the outcomes of this research and let you know where you can read about the findings of this research.
- Do you have any questions at this point?

Thank you again for making yourself available for this interview.

Appendix I

Category 1: The interplay of theory, practice and experience (Orange)

- a. Practical engagement
- b. Reflective learning – journals, diaries, self-evaluation and verbatims.
- c. The role of the physical in learning

SHORT TITLE: Theory, experience and practice

Sub-category	Respondent	Quotes
Need to verbalise experience	A07	well I guess it was that it was in the verbatims and the practice, my own personal practice and putting it down in writing and I guess to me it was a good thing to be able to see and feel the transference and countertransference but I do think that could have been explained better but actually in the triads that could really been taught to us that was really transference to so to be able to name some of the theory so that in practice we have given the theory but in practice it was up to ourselves to understand the theory without. I suppose that's a teacher coming out in me. And I suppose that was my biggest criticism. The theory and practice not being explored.
	A07	It is about my need to be able to verbalise after I had experienced it within the group. And again sharing it with others in the group. Otherwise it became that one on one experience. I suppose SD is the same. That's fine.
	A07	It is as much that opportunity needs to be given to the person for everyone to verbalise what was happening in the group or the triad and why. Then sit back and analyse.
Experience of different SD traditions	A07	So I suppose that was the other thing with my SD the first year where I had a SD which was Ignatian and there was real conflict in that she was doing one thing with me and I was being trained in another way and I had no idea what was going on and I was blaming my SD but now I see that it was her training and that was where the tension within me was in the first year.
	A07	I was in conflict. It was a difficult year in terms of SD I guess throughout my religious life I have had a SD – most times through retreat times but others times as well. But there was not a regular SD year in year out. I have experienced all different kinds and I had not thought about the theory of it.

Sub-category	Respondent	Quotes
Theory before practice	A07	I think the first semester I did not really know what was happening in all of that. I think even within our peer group it took us a long time to know what peer supervision was about because we really did not know what supervision was about.
Theory and experience/ Practice	A07	I suppose looking at the dream work once I had the theory part of that it made sense of all the practice that I had experienced. So I guess that the two need to go together – the theory and the experience. I suppose that's my point all the way through– how I Learn.