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*Editorial Introduction*

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## **The Practice of Co-operative Inquiry**

In the *Handbook of Action Research*, Hilary Bradbury and I describe action research as a “family” of participative, experiential, and action-oriented approaches to research (Reason & Bradbury, 2001a, p. xxiii). The different practices, which make up this family, sometimes overlap and sometimes emphasize different aspects of the action-research movement. They also share certain characteristics in common:

... action research is a participatory, democratic process concerned with developing practical knowing in the pursuit of worthwhile human purposes... It seeks to bring together action and reflection, theory and practice, in participation with others, in the pursuit of practical solutions to issues of pressing concern to people, and more generally the flourishing of individual persons and their communities. (Reason & Bradbury, 2001b, p. 1)

Co-operative inquiry is one articulation of action research. The original proposal for experiential inquiry was put forward by John Heron in 1971 (Heron, 1971). This developed into a practice of co-operative inquiry as a methodology for a science of persons (Heron, 1996; Heron & Reason, 2001). In co-operative inquiry, all those involved in the research endeavor are both co-researchers, whose thinking and decision-making contributes to generating ideas, designing and managing the project, and drawing conclusions from the experience; and *also* co-subjects, participating in the activity that is being researched. The arguments, which support this approach—the participative worldview, the human person as agent, critical subjectivity, the political, epistemological ecological, and spiritual dimensions of participation—are explored extensively elsewhere (Heron & Reason, 1997; Reason & Bradbury, 2001b); and we have described the methodology itself and the choices facing an inquiry group in considerable detail (Heron, 1996; Reason, forthcoming).

This issue of *Systemic Practice and Action Research* focuses on the *practice* of co-operative inquiry, and, in particular, on the choices and actions of those who initiate and facilitate co-operative inquiry groups. I have been struck how much the people who I talk to about co-operative inquiry want to hear *stories*: not just the theory and methodology, but the human stories about how it all works. They want to know how to initiate an inquiry group, how many people to include, how long the inquiry should go on for, how to locate an inquiry within an organization.

In particular, they want to know about the personal qualities this kind of inquiry will demand, the attitudes and skills they will be required to manifest. Maybe the most frequent question people ask is about power and influence: If the inquiry is to be truly co-operative, does this mean that as initiator I cannot be influential?

The six papers in this issue address these concerns by providing accounts of how the authors—all of whom recently initiated and participated in co-operative inquiry projects—established and worked with inquiry groups. The majority of the contributors have close associations with the Centre for Action Research in Professional Practice (CARPP) at the University of Bath, where we have developed our practices of co-operative inquiry over many years. Kate McArdle recounts in some detail how she established an inquiry group, which is ongoing at the time of writing, of young women in management within a multinational corporation. Geoff Mead tells the story of inquiring collaboratively into leadership practices in Hertfordshire Constabulary. Marian Charles and Sara Glennie write about their just-completed inquiry with professionals engaged in child protection work. Mark Baldwin compares his experience in five inquiry groups he has facilitated with social work professionals. Penny Barrett, writing with Bev Taylor, reflects on the formal and informal aspects of her inquiry with midwives in an Australian hospital. Carlis Douglas explores the liberating possibilities of co-operative inquiry in her work with Black women. Following these papers, Patricia Maguire, who has made significant contributions to practices of participatory action research, particularly emphasizing feminist dimensions of inquiry, offers a commentary from a political and feminist perspective.

## 1. THE METHODOLOGY OF CO-OPERATIVE INQUIRY

The reader unfamiliar with co-operative inquiry may require a brief methodological outline; further descriptions can be found in the references on the CARPP website [www.bath.ac.uk/management/carpp](http://www.bath.ac.uk/management/carpp) and on John Heron's website [www.human-inquiry.com](http://www.human-inquiry.com).

Co-operative inquiry can be seen as cycling through four phases of reflection and action, drawing on a fourfold "extended" epistemology: *experiential knowing* is through direct face-to-face encounter with a person, place or thing; it is knowing through empathy and resonance, that kind of in-depth knowing which is almost impossible to put into words; *presentational knowing* grows out of experiential knowing, and provides the first form of expression through story, drawing, sculpture, movement, dance, drawing on aesthetic imagery; *propositional knowing* draws on concepts and ideas; and *practical knowing* consummates the other forms of knowing in action in the world (Heron, 1996; Heron & Reason, 2001).

In Phase I, a group of co-researchers come together to explore an agreed area of human activity. In this first phase, they agree on the focus of their inquiry and

together develop a set of questions or propositions they wish to explore. They agree to undertake some action, some practice, which will contribute to this exploration, and agree to a set of procedures by which they will observe and record their own and each other's experience. Phase I is primarily in the mode of propositional knowing, although it will also contain important elements of presentational knowing as group members use their imagination in story, fantasy, and graphics to help them articulate their interests and to focus on their purpose in the inquiry. Once the focal idea—what the inquiry is about—is agreed upon, Phase I will conclude with planning a method for exploring the idea in action, and with devising ways of gathering and recording data from this experience.

In Phase II, the co-researchers now also become co-subjects: they engage in the actions agreed, observing and recording the process and outcomes of their own and each other's experience. In particular, they are careful to notice the subtleties of experience, to hold lightly the propositional frame from which they started so that they are able to notice how practice does and does not conform to their original ideas. This phase involves primarily practical knowledge: knowing how (and how not) to engage in appropriate action, to bracket off the starting idea, and to exercise relevant discrimination.

Phase III is, in some ways, the touchstone of the inquiry method. It is a stage in which the co-subjects become fully immersed in and engaged with their experience. They may develop a degree of openness to what is going on so free of preconceptions that they see it in a new way. They may deepen into the experience so that superficial understandings are elaborated and developed. Or they may be led away from the original ideas and proposals into new fields, unpredicted action and creative insights. It is also possible that they may get so involved in what they are doing that they lose the awareness that they are part of an inquiry group: there may be a practical crisis, they may become enthralled, they may simply forget. Phase III involves mainly experiential knowing, although it will be richer if new experience is expressed, when recorded, in creative presentational form through graphics, color, sound, movement, drama, story, poetry, and so on.

In Phase IV, after an agreed period engaged in phases II and III, the co-researchers reassemble to consider their original propositions and questions in the light of their experience. As a result they may modify, develop or reframe them; or reject them and pose new questions. They may choose, for the next cycle of action, to focus on the same or on different aspects of the overall inquiry. The group may also choose to amend or develop its inquiry procedures—forms of action, ways of gathering data—in the light of experience. Phase IV is primarily the stage of propositional knowing, although presentational forms of knowing will form an important bridge with the experiential and practical phases.

In a more complete inquiry, the cycle will be repeated several times. Ideas and discoveries tentatively reached in early phases can be checked and developed; investigation of one aspect of the inquiry can be related to exploration of other parts;

new skills can be acquired and monitored, experiential competencies realized. The group itself may become more cohesive and self-critical, more skilled in its work and in the practices of inquiry. Ideally the inquiry is finished when the initial (and emergent) questions and concerns have been thoroughly addressed in practice, when there is a new congruence between the four kinds of knowing. It is, of course, rare for a group to complete an inquiry so fully. It should be noted that the actual process is not as straightforward as the model suggests: there are usually minicycles within major cycles; some cycles will emphasize one phase more than others; and some practitioners have advocated a more emergent process of inquiry, which is less structured into phases; nevertheless, the discipline of the research cycle is fundamental.

The cycling can really start at any point. It is usual for groups to get together formally at the propositional stage, often as the result of an invitation from an initiating facilitator. However, such a proposal is usually birthed in experiential knowing, at the moment that curiosity is aroused or incongruity noticed (Rowan, 1981, 2001). The proposal to form an inquiry group, if it is to take flight, needs to be presented in such a way as to appeal to the experience of potential co-researchers.

In all forms of action research, the quality of inquiry practice lies far less in impersonal methodology, and far more in the emergence of a self-aware, critical community of inquiry nested within a community of practice. Thus, while co-operative inquiry as method is based on cycles of action and reflection engaging four dimensions of an extended epistemology as described above, co-operative inquiry as human process depends on the development of healthy human interaction in a face-to-face group. The would-be initiator of a co-operative inquiry must have a willingness to engage with the complexities of these human processes as well as the logic of inquiry. This requires us to recollect our understanding of group processes. It is these human issues that the contributors to this issue primarily address themselves.

## **2. REFLECTING ON THE ACCOUNTS OF INQUIRY**

As I read through the six accounts which follow, I notice how the facilitators and their inquiry groups hold together opposite tendencies as the inquiry emerges. Here are my reflections on some of these.

### **2.1. Ordinary and Special**

I am struck how co-operative inquiry is both very special and very ordinary. The accounts show clearly how working in a group of people who trust each other, engaging together in cycles of action and reflection over time, supporting and challenging one other to look experience in the face and take risks in developing new forms of practice, is a very special experience. Engaging in cycles of action

and reflection can birth a high-quality attention and bold experiments in practice which is the essence of inquiry. The accounts *also* show what an ordinary, everyday experience this is: people come together and share stories about their work; they drink tea and eat cake together; *ordinary talk* becomes inquiry, as Barrett puts it.

## 2.2. Legitimate and Different

I also noticed the importance of establishing both legitimacy and difference within their hosting organization. The contributors give accounts of their negotiations with significant organizational gatekeepers for material and symbolic support, and to address an organizational issue, which is seen as important. At the same time, the inquiry group offers difference, is in some important sense countercultural: they provide a collaborative space within a hierarchical organization (Mead), young women's voices within a traditional corporate structure (McArdle), the voices of practical experience in the face of government regulation (Baldwin), and so on. One might think that Douglas, whose inquiry with Black women takes place entirely outside formal organizations, offers an exception to this rule—but she too has to draw on her legitimacy as an inquiring member of her community and offer a space where difference can emerge.

## 2.3. Bounded and Open

One key characteristic of co-operative inquiry is that the group, which is typically closed to new members for the duration of the inquiry, offers a safe space within which inquiry can flourish. The group is usually drawn together through a series of exploratory conversations and meetings, and at some point, which often has symbolic significance, the boundary is drawn with so that “now we know who ‘we’ are,” as McArdle puts it, and members can engage in the processes of inclusion, control, and influence which constitute group process (Reason, forthcoming). Charles and Glennie suggest that, “the inquiry offered a qualitatively different space.”

Creating a boundary creates safe space but also a boundary issue: if some are “in” then others are “out” and the transition back across the boundary to share the learning with others needs to be managed carefully. As Mead tells in his account, the police leadership inquiry group offered a transformational space for its members, but, he adds, “we are still struggling to communicate the benefits of a collaborative approach to a wider police audience.” Charles and Glennie from the beginning have to create a safe space for their inquiry group within the complex and pressured field of child protection. The midwives inquiry group that Barrett and Taylor write about appears particularly successful in making a space for themselves *and* establishing the Early Mothering Group as a recognized part of hospital practice; this may be because they were willing to open their group boundary at an appropriate point.

## 2.4. Power and Collaboration

There is a line of creative tension between power and authority, on the one hand, and collaboration, on the other. The initiating facilitator exercises power and influence in order to create the space within which the group can develop and flourish; but this power must be used to facilitate collaboration—if it is held too long, or used to oppressively bolster the initiator’s position, it becomes degenerate. Douglas and Mead both realize that abdicating power does not lead to collaboration and that they need to be powerful leaders in their groups; Douglas explores, in some detail, the dilemmas that this creates for her and provides a glimpse of her reflections on the leadership role.

All the contributors exercise power strongly:

- In the initial framing of the inquiry questions, they all have an agenda to pursue, which has emerged in their prior personal inquiries or from organizational opportunities.
- In creating and holding space for the inquiry process, working the formal organizational, informal networking and dialogue, and managing the ongoing affairs of the inquiry.
- By working toward creating a culture of inquiry, which differentiates the inquiry group from the rest of the organization—note how Mead uses the jumping mouse story and how McArdle reorganizes the furniture to make a space fit for conversation.
- Through facilitation of the group process so that collaboration can emerge as quickly as possible—helping people feel comfortable, providing structures which clarify the task early on, and so on.
- Through moment to moment facilitation of the group task. Baldwin refers to his use of “catalytic” interventions to draw out themes, reflect back, summarize; and also confronting, “devil’s advocate” interventions when he senses issues are being avoided. Charles and Glennie provide strong directive leadership when group energy flags, at the same time asking themselves if this is appropriate.
- Through facilitating the emotional process of the group. As will be clear from all the accounts, but particularly highlighted by Douglas, the process of inquiry into significant life issues is emotionally challenging. The Black women Douglas works with find that their learned strategies of surviving get in the way of their ability to participate with each other in the inquiry group and interfere with their capacities for thriving. The field of child protection where Charles and Glennie are working is “permeated by uncertainty and anxiety.” One of Baldwin’s groups cannot get on with their inquiry task until they have confronted difficulties in their working relationships. And so on. The inquiry facilitator has to be prepared to deal with anger, frustration, fear, and grief, especially as the inquiry deepens and the group experiences the challenges of their situation.

Yet this power is always in the service of creating a space for collaboration, the “genuine achievement of a sense of ‘us’” as Wadsworth has it (2001, p. 420). While holding their power, the facilitator must also be willing and able to encourage participant initiatives, to step into the background when these occur, to become an ordinary group member; and yet be willing (but not too willing) to take the stage again when the situation requires it. They need to actively open their own leadership to inquiry and model the process of learning through inquiry for the group as a whole. This is what Torbert refers to as transformational leadership (Torbert, 1991, p. 56): mutual, actively seeking challenge, essentially vulnerable. And lest all this seems to be too demanding, the facilitator must heed John Heron’s words:

May I suggest to the reader who . . . starts to find the account of all these skills daunting and disheartening, that the discipline of engaging in a co-operative inquiry and its cyclic process is itself a means of developing them. Furthermore, while the description of them can appear immaculate, the occurrence of them is maculate, fractal, earthy, irregular and granular. We are all beginners. (Heron, 1996, p. 115; see also Heron, 1999)

In this introduction, I have reflected on some of the issues I see raised by these six accounts. I am sure each reader will see learnings which apply particularly to their experience, and will find yet different lessons suggested by Pat Maguire in her commentary. We are, indeed, all beginners; and we can all learn.

With thanks to the contributors for writing these accounts and responding to my editorial demands, to the many participants in the inquiry groups, and to my colleagues and students with whom the adventure of inquiry continues.

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