Article

BUILDING A CULTURE OF EVERYDAY INQUIRY, LEARNING AND ADAPTATION

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INTRODUCTION

The age of COVID-19 embodies a collective experience of adaptive leadership amidst complexity – for individuals, whānau, hapū, iwi, communities, workplaces, as well as researchers and professional practitioners. In this article, we tell stories of some significant 'aha moments' in the adaptive leadership of an innovative Bachelor of Leadership for Change degree and identify how key insights emerged that informed programme pivots, actions and decisions.

The storytellers bring three distinct perspectives. Margy-Jean, a learning facilitator involved in programme delivery from the outset, shares stories from the early delivery and co-design phase with the first adopters (2018/2019). Deane, a programme graduate who brought a learner voice through their research to recent programme adaptations, shares stories of his contribution to the reset phase (2020/2021). In a separate article in this issue, Sam, the lead programme designer, shares insights from his story of the programme development phase (2016/2017) which set the foundations for approval by the New Zealand Qualifications Authority (NZQA).

We argue that our intentional 'everyday inquiry on the run,' engaging diverse research methods and stakeholders, has been a key structure supporting our capacity to learn, lead and adapt amidst the complexity of this age. We discuss how an intentional programme culture of inquiry, learning and adaptation and specific research processes have enabled valuable leadership learning opportunities for our tauira/learners. In addition, we suggest ways in which developmental evaluation approaches can contribute further in the future of this innovation. We offer our stories to others interested in the role of embedded reflective practice in supporting education innovation, leadership and learner agency.

BACKGROUND

Otago Polytechnic's Bachelor of Leadership for Change (BLfC) is a self-directed, action-centred degree programme designed to support people wanting to make a difference in their lives, workplaces and communities. The programme guides and supports learners to build confidence and core transferable leadership, learning and change capabilities as they identify a problem, figure out a solution and get into action (Otago Polytechnic, 2022).

The programme was developed and designed around heutagogical principles (Hase & Kenyon, 2007; Blaschke, 2010) over a two-year period culminating in NZQA approval for delivery in late 2017 (Mann et al., 2017a, 2017b). Heutagogical principles set a foundational understanding of learning as emergent, contextual and collaborative. Therefore the programme's learning infrastructure and curriculum has needed to be highly flexible and responsive to diverse learner contexts, cultures and capabilities. Learner contracts and pathways have been shaped by the learner with their learning facilitator, agreeing what needs to be learned, what learning activities/processes will support that learning and how evidence will be gathered and presented for assessment to demonstrate what has been learned in relation to programme requirements.

Facilitation of transformative learning, particularly in the age of COVID-19, has involved working with an ongoing tension between structure and emergence (Malcolm, 2020). A culture of individual and collective inquiry-based learning and adaptive leadership amidst complexity has not only been central to the learner journey, but also for the learning facilitators leading the programme. The facilitation team's ongoing reflective practice has been essential to continually observe, reflect on any issues emerging in their practice, figure out solutions and take, often rapid, action to respond and adapt to meet learner needs.

An intentional culture of collaborative inquiry, learning and adaptation, based on the concept of developmental evaluation (Gamble, 2008; Patton, 2011) has provided some structure for the BLfC facilitation team's reflective practice through complex times since 2018. Any new innovation faces adaptive challenges, especially transitioning from a small group of keen, early adopters to scale to a larger, wider audience (Moore, 2014). However, in this context there are additional pressures from the restructuring of the vocational education sector into Te Pūkenga, and the associated re-positioning needed within the programme's home institution to renew the programme's mandate. Further, COVID-19 constraints limited some of the face to face opportunities for learners and other key stakeholder engagement in the programme culture of co-design.

METHODOLOGY

Developmental evaluation (DE) provides rapid feedback of evaluative information to social innovators and their stakeholders to inform adaptive leadership and development of change initiatives in complex, dynamic situations (Patton et al., 2016). Developmental evaluation brings an evaluative mindset to innovators' practice and helps track the impact of activities as they happen to support development, and to guide adaptation and rapid innovation from what is learned (Patton 2011; Westley et al., 2006). Developmental evaluation differs from formative evaluation which seeks to improve a particular model of practice, and summative evaluation which seeks to test if a particular model achieves desired outcomes (Patton, 2011).

The research methods used in the programme's DE work since the delivery phase began have included both informal and formal data gathering and analysis to inform agile, responsive adaptation, for example:

- Formal facilitated sessions for learner input, including feedback about programme design, success factors, improvement suggestions and impact.
- Very regular facilitation team meetings to critically reflect on our practice, discuss any learner or group feedback and translate this into agreed actions and adaptations, for example of learning infrastructure.
- Focus groups and interviews with external stakeholders, colleagues, learners and alumni; one round convened by senior leadership in 2020 and two focus groups convened by the facilitation team in mid and late 2021.
- A student-led process of interviewing 11 fellow learners and alumni in 2021 around their learner journey and programme enhancement recommendations for the reset.
- Three visits from the programme's external Monitor (2019, 2020, 2021) and indepth staff team planning meetings have supported deeper sense-making and adaptations.

Building on earlier published findings from this DE work (Malcolm, 2020), this article is based on the authors' reflexive practice (Westoby, 2022) about the life of this programme. We each look back on the programme development processes we were involved in leading and the data/feedback/observations from our research to identify stories about significant pivots in thinking, actions, decisions and what supported their emergence. In the discussion, we revisit Patton (2016)'s explanation of a developmental evaluation mindset and essential guiding principles (developmental purpose; evaluation rigor; utilisation focus; innovation niche; complexity perspective; systems thinking; co-creation; timely feedback). We conclude that there are opportunities to strengthen some aspects of our application of DE into the future that could in turn strengthen the implementation of this innovation.

FINDINGS

Here we tell stories of some significant 'aha moments' and how key insights emerged from our research and reflections that informed programme pivots, actions and decisions. They were not necessarily all eureka moments. The seeds of their emergence were often sown over quite a period or through a combination of factors.

Building the plane while flying it: Margy-Jean's story

The first big insight for me was that 'building the plane while flying it' (that is, co-designing much of the course content and infrastructure with the first early adopters) made sense. Our BLfC facilitation team was confirmed a few weeks before the first learners started in February 2018. Nearly a decade earlier, my doctoral studies had included an indepth curriculum review for a not-for-profit sector management programme (Malcolm, 2014). My own internal quality drivers and assumptions about teacher responsibilities were on high alert. How could we do justice to this new degree and prepare curriculum resources in such a short timeframe?

The pivot moment for me was remembering a key message from all graduate interviewees in my doctoral research, "that the way the Unitec programme was taught had as much, if not more, impact on their leadership learning as the curriculum content" (Malcolm, 2014, p. 128). Therefore it was appropriate that our BLfC team focussed early on our own 'how' professsional practice, to create the conditions for learning to emerge. The 'what' curriculum content would draw on the diverse wisdom of the whole learning community – kaiako, tauira, guest speakers – and learners' own inquiry skills and knowledge. My practice needed to let go some of my 'teacherly-responsible' behaviours to embrace a more heutagogical mindset of learning as emergent, contextual and collaborative. So, as a team we discussed shared underpinning values, what shifts self-determined learning required of us, designed initial (mostly online) learning infrastructure and research strategies that would support ongoing, collaborative co-design, learning and agile adaptation as a whole leadership learning community with the early adopters.

My second significant "A-HA" moment emerged during the first formal developmental evaluation session with the learners in 2018, seeking indepth feedback on their learner journey experience so far and insights into programme design enhancements. One of the tauira commented how they now realised how much their voice really mattered in this programme co-design. It was a leadership experience in itself for them, to have such agency compared to their previous experiences of education. Tauira in that initial cohort had a real sense of empowerment to push the boundaries of co-design. For example, one learner challenged the final assessment requirements and persuasively argued for more emphasis on oral assessment as a strategy for decolonising education (Te Wake, 2020). Staff and organisational responses to tauira feedback continued to show that learner voices and leadership could impact structural change as well as their own individual learning pathways.

The key pivot from a teaching, learning and research perspective was to see participation in an adaptive culture of programme co-design, evaluative thinking and collaborative learning as an essential part of the leadership learning 'hidden curriculum.' Our learners are required to design and implement processes for critically evaluating their own change projects. Staff modelling of ethical practice, research process design and their direct experience as research participants helped scaffold experiential learning towards these capabilities. However, while we can offer these opportunities, not all tauira (exercising their self-determined learning agency) choose to participate in these research activities.

A third key pivot point emerged when we had an opportunity at our noho marae intensive with 15 learners in November 2020, to engage in our annual formal DE feedback session. By now we had a more diverse range of learners who had all started at different times. COVID-19 constraints had delayed our ability to get them together face to face earlier on in their studies. Tauira experience of learning

challenges in adapting to a different learning culture and positive programme success experiences were similar to earlier learners (Malcolm, 2020). However what surprised me was that we had significantly more feedback about programme improvements needed than previously, especially around improved onboarding, information and communication platforms and bicultural practice.

This was important, constructive feedback, but how was it be interpreted? Was it a factor of different research methods (greater percentage of learners involved and face to face engagement), facilitation staff team changes, the 'personas' of this group of learners, the impact of COVID-19 and not being able to meet face to face earlier? Quite likely all of the above, and in hindsight, also a sign of a new phase of development, where learners were coming in with expectations of a more established programme compared to the early adopters. We clearly had to work differently to create a strong cohesive learning community when we cannot get learners together as a group early on in their study. Furthermore, it was important to put these improvement flags alongside the stories these same learners shared of the programme impact on their self awareness, sense of identity, appreciation of process, growth in 'ako,' relational and cultural capabilities, critical thinking capacity and broadening perspectives, with identifiable ripple effects on their families and work contexts already.

Resetting the trajectory: including Deane's story

By 2020, New Zealand government reforms of vocational education were shaping up a new national operating environment for all polytechnics, and a new programme like this was vulnerable being still in its establishment stage. Otago Polytechnic leadership reviewed the programme's alignment with the new Te Pūkenga context and conducted external stakeholder focus groups. A key pivot at this stage was senior leadership recognition that this programme offered significant potential to meet the needs of Te Pūkenga priority groups, including Māori, Pasifika, and neurodiverse learners (not just their original vision of serving a school leaver niche). The value of our own DE research was evident in these decisions, and the team was resourced to invest in a range of programme 'reset' improvements.

Deane, now a graduate of the programme, focused his final year's study in 2021, on a research project bringing a learner lens to the reset work. His positioning meant he had a unique opportunity to gather open, honest feedback from learners that they may not have shared so freely with facilitators – and presented a challenge to make sense of their feedback without simply reporting back key themes. He explains the emergence and significance of his findings next:

> As a part of my BLfC final year change project, I contributed a learner's voice to the 'reset team.' I have professional experience in creating, promoting or redeveloping educational programmes for corporate, online and college programmes. Using ethnography as the tool to bring out patterns and programme-relevant data, I searched for commonalities in the 11 interviewees' reports of their experiences and developed my interpretation of these. This is the data most corporate projects collect to find possible improvements in the 'customer experience.'

> Most interviewees were in their last year of the programme or had recently graduated. Most were very precise about what they had learned from their time in the programme. Everyone talked about things they struggled with which they thought hindered their progress rather than added to their learning. Two graduates had had conflicts with facilitators and fellow learners. When I asked them directly about 'obstacles,' that could be 'fixed' they advocated for the removal of at least three core programme components: the ethics review, bicultural practice, and the 'ako' community. Yet when asked what they were doing after graduation, their answers demonstrated that they both were seeking to learn more about those same challenges in further study they had since embarked on. My interpretation was that the 'obstacles' had not defeated them. Rather, the challenges they faced had quite likely played a part

in prompting a shift in their professional practice and their understanding of themselves. I would say a transformation had occurred.

Every interviewee commented on the Ethics Review. Before the review, many learners interpreted the ethics questions as Otago Polytechnic being risk-averse or protecting itself. After, almost all learners described it as an opportunity to get feedback about their research from an outside source and a chance to see the holes in their process. This represented a measurable transformation of attitude in my interpretation.

I began to see that without challenges the learners did not experience the *disruption* that Mezirow (2018) described as a vital part of any transformational learning experience. I had begun my research with the view that an 'effective' programme was an easy one. That all impediments to learning should be removed. But where there is no 'transformation of practice,' there is only the imparting of basic skills. The disruption had a vital role.

I began to see that 'the obstacle is the way' and that the community of practice is vital in working through those obstacles. Mezirow concluded that without disruption, a learner won't make the fundamental changes that strengthen their professional and personal practice. At those vulnerable moments, learners asking other learners for help can foster community. Yet most of the interviewees were solopreneurs whose first instinct was to resist oversight or collaboration. Having to find help rather than avoid a problem was consistently new for most learners I interviewed. I experienced this when other learners asked me for help too, and thus a key learner message from my final reporting was that having people (facilitators and other learners, or 'ako' practice) to work through problems is one of the main benefits of the programme.

Instead of my original plan to create a map so learners could avoid or easily conquer some of the more difficult parts of the course (at the risk of dumbing down the handbooks and resources) I instead advocated for telling learners 'why' (not how) they needed to deal with each obstacle. All the 'whys' are in fact expressions of the Graduate Profile Outcomes that are the fundamentals of the programme's intentions and the rubrics learners are graded by. Further I recommended a variety of ways to improve communication of the diverse sources of help that learners can ask for. That act of asking, rather than being told 'how to' all the time, leads to a more profound learning experience. It develops critical thinking, reveals research paradigms and strengthens habits of self-directed learning including an ability to embrace vulnerability and uncomfortable disruptive experiences.

HOW DEVELOPMENTAL EVALUATION FINDINGS ARE INFORMING PROGRAMME ADAPTATIONS

The programme team role was to listen to diverse perspectives from different stakeholder groups (learners, graduates, our external programme monitor, senior leadership, colleagues) and operationalise programme amendments.

Two underlying tensions for a programme like this stood out from our latest multi-stakeholder workshop in December 2021 that have been inherent, ongoing issues to navigate. Firstly, the tension between what is self-determined by the learners and what are foundational programme requirements. Secondly, how to enable learners to see the critical connections between the various parts of the programme infrastructure. For example, participation in our programme Community of Practice, knowledge of Te Tiriti o Waitangi, and critical reflective practice are all essential foundations for learner and programme success, yet tempting spaces for a vulnerable or strongly independent learner to avoid. Face to face hui for learners and staff can play a critical role in onboarding, learning and stretching mindsets, yet budgets and COVID-19 can easily get in the way of these happening. The progamme culture involves mindshifts at many levels: from learning as an individual journey to one of collaborative 'ako'; accepting vulnerability, discomfort and uncertainty as part of learning; building clear

connections between critical reflection, evidence of capabilities and framing one's practice. The programme reset so far has grappled with these tensions in the following ways:

- Stronger onboarding processes for learner cohorts at fixed times in the year – a move away from a rolling intake whenever the learner is ready – which also make face to face intensives early in the learner's journey more feasible.
- A more rigorous recognition of prior learning process on entry, to better determine the appropriate study pathway for experienced learners.
- Revision of the entry courses which all learners complete to lay common foundations.
- Revision and moderation of all assessment rubrics and handbooks to provide consistent, clear messaging including around commitments required and a glossary of key language.
- Development of a new 'one stop shop' Moodle site as the primary information platform and use of Teams as the primary communication platform.
- Introduction of four checkpoints across each study year to monitor/support learner progress with developmental feedback, including the option to invite fellow learners, whānau, workplace or community colleagues into these conversations.
- Revision of collaborative project courses to now be done with their programme peers, to strengthen learning. community engagement.
- Clearer communication throughout of expectations, boundaries and supports available for self-directed learning.
- Initial work on embedding Otago Polytechnic's Māori Strategic Framework across the programme, based on a stocktake of what is already in place towards becoming a bicultural programme.
- Online celebration of graduands as an off-boarding step when graduation ceremonies have not been possible.

DISCUSSION/CONCLUSIONS

One of the important contributions of Deane's research was to prompt us to communicate our kaupapa more clearly with our tauira, including explaining our underlying educational intent around transformational learning (Mezirow, 2018). We aim to strengthen our orientation of new learners to expect and embrace 'disorienting dilemmas,' engage in critical reflection, and commit to being part of our community of practice to make sense of the actions they are taking to grow their confidence and capabilities in new roles, relationships and contexts (Otago Polytechnic, 2022). Learning to "work with the uncomfortable and the emergent spaces" (Malcolm, 2020, p. 36) is one of the most common programme impacts described by our alumni. Thus, while we continue to strengthen the programme foundations, our goal is to scaffold and support learners through some relevant challenging experiences.

Our programme expects tauira/learners to grow capabilities to be reflective practitioners able to undertake critical evaluation of their professional practice. They do this through curating their own experiential learning with work-based learning projects and activities to support their leadership learning. The DE processes outlined show how the programme research context can offer an experience of evaluative thinking, learning about designing and delivering evaluative practices and how these can directly influence change. This is what Patton (2016, p. 307) calls the process use of DE, in which "learning and behaviour changes [can] occur among those involved in the evaluation as a result of their involvement – for example, becoming more adept at evaluative questioning and thinking."

Developmental evaluation research requires teaching staff and other key institutional stakeholders to model a culture of evaluative thinking, intentional inquiry structures, openness to feedback and listening to diverse voices in co-designing key programme features. This has been an ongoing iterative inquiry for the BLfC facilitation team, as the complexity and diversity of learners' contexts, changed project aspirations and capabilities have continued to test and clarify the boundaries of what is possible within the institutional parameters of a tertiary qualification, albeit a highly innovative one. The programme's future is still uncertain at the time of writing, but the research provides a solid foundation for when the time is right for the next phase of growth and development of this innovative degree.

Reflecting on the use of DE principles, processes and mindset to date, we can see the need for more graduate/alumni, workplace, whānau and community stakeholder voices to be built into our ongoing developmental evaluation research, to gain a wider picture of the learner journey intersection with real-world, longer-term outcomes. One positive outcome of our reset work is to engage more of these stakeholders in learners' quarterly checkpoint conversations, to add value not only for the learner, but to our ongoing, real-time programme feedback loops. While we show the depth and breadth of external stakeholder engagement in the initial programme development phase, our DE work since initial delivery has been very learner-centred, in other words, internal stakeholder focused. While this has been for sound educational co-design reasons, Patton's (2016) DE mindset principles (more fully discussed in Mann and Malcolm, in this issue) remind us of the importance of engaging all the key systems actors in the DE inquiry process.

Developmental evaluation at its most rigorous should bring a wider 'systems thinking' lens and at its most valuable, be designed as a process that supports the life-force of an innovation's intent. Patton argues that DE is ultimately about 'dynamic reframing,' seeking to "articulate, test, inform and reframe mental models of the 'actors' for the system they are operating in and the ways they have been and could be influencing it, so as to realize their intent" (Patton et al., 2016, p. 7). There is a lot of complexity to manage in an innovative programme like this and institutional leadership, industry stakeholders, facilitation staff, learners and their whānau need to understand our intent/kaupapa, our roots/whakapapa and be more engaged in co-creating the next phase.

Reflecting on the complexity of the BLfC journey to date and the essential elements of DE (Patton et al., 2016), there is more work to be done around evaluation rigor, and in particular, engagement of all the "actors" who need to be on board to realise the potential use and impact of this programme. As Deane's research highlighted, it is tempting to look at the obstacles that learners face and consider them as risks that need to be mitigated, programme improvements that need to be made, or more structured curriculum content that needs to be offered. However, this programme is based on real-world experiential learning around leading change. The obstacles are a necessary part of the way and emerge without anyone needing to actively create them. Wicked problems do not have simple solutions and require leaders to be active inquiring, collaborative learners, curious to explore questions they do not know the answers to and open to look in the mirror at their own practice.

Developmental evaluation provides a framework for all the actors in educational innovation to bring an inquiring learning mindset to work with the necessary complexity, emergence, and opportunities of a leadership learning qualification. It is possible, but not easy, for innovators themselves to be insider researchers leading DE. It has been timely to pause, reflect and write about this work before designing the next phase of this research inquiry, which will focus on the graduate impact. We offer our research to support understanding of heutagogical philosophy in action and the implications for operational culture, boundaries, processes, promotion and resourcing. Our evidence indicates that educational innovations such as this can support successful leadership learning experiences for a diverse range of learners, including Māori, Pacific and the neurodiverse. Embedding an intentional DE approach enables a diversity of stakeholder voices to engage in ongoing inquiry, learning and adaptation.

GLOSSARY

Tauira – learners(s)
Kaiako – teachers/learning facilitator(s)
Ako – each person's capacity for being both a teacher and a learner
Noho marae – a residential retreat staying at a Māori meeting house
Te Pūkenga – the new national structure for vocational education in Aotearoa NZ
Whānau – extended family

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