Action Confidence as an Indicator of Transformative Change

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Abstract

This article reports on the findings from an interview-based, qualitative study of adult learners in Scotland participating in the MITx u.lab MOOC (massive open online course) in 2015 and 2016. It focuses on interviewees’ accounts of the impact of participating in u.lab on their work and lives. Using grounded theory as an analytical guide, we explore participants’ perceptions of the impact of their engagement in the learning process, which reflect intrapersonal, relational and systemic learning. Through these accounts, we became particularly interested in participants’ relationship to taking action and the way this changed over the course of their participation in the learning process. We conclude that an embodied change in one’s perception of the nature and purpose of action—something we call ‘action confidence’—is reflective of transformative learning as it indicates significant epistemological change for participants.
Action Confidence as an Indicator of Transformative Change
In January 2015, at what was perhaps the peak of the MOOC (massive, open, online course) movement, MITx launched *u.lab: Transforming Business, Society and Self*. Built around Otto Scharmer’s Theory U (Scharmer & Kaufer, 2013; Scharmer, 2016, 2018), *u.lab* was a conscious attempt to make transformative learning widely accessible by providing a framework and blended learning process available at no cost through the online learning platform edX (https://www.edx.org/). The scale has been significant. As reported by the Presencing Institute, to date over 150,000 people across 185 countries have registered for *u.lab* (www.presencing.org/aboutus/what-we-do).

Scotland became the first country to develop a network of peer support for participants at a national level, called *u.lab Scotland* (https://ulabscot.com/about/), connecting *u.lab* participants to one another throughout the year. At the time that *u.lab* was launched, the Scottish Government had been engaged in a conversation for a number of years about shifting its approach to policy making toward more co-productive, asset- and outcome-based approaches, as represented in the National Outcomes for Scotland policy (Scottish Government, n.d.) and the Community Empowerment (Scotland) Act (Scottish Government, 2017). One of the challenges was how to put these aspirations into action. In addition, *u.lab* arrived several months after the independence referendum, a period of public reflection about the kind of society Scotland wants to be. This reflection brought with it a collective desire to create change, but not a clear path for doing so. When a small group from the Scottish Government and voluntary sector took part in the first iteration of *u.lab*, they saw it as one pathway for supporting a more outcomes-based, community-empowered approach to change. The government hosted a number of national gatherings to raise awareness about *u.lab*, and supported a cross-sector holding team to connect a network of individuals and groups engaging in the process simultaneously in different locations throughout Scotland.
Through this network, participants were invited to ‘share their stories’ of their u.lab participation and these stories form the basis of the present study. The interviews focused on interviewees’ accounts of the impact of participating in u.lab on their work and lives. We then used a grounded theory analytic framework to begin to inquire more deeply into their accounts to build a more nuanced understanding of the learning process and its outcomes as experienced by the participants.

The interviewees describe impact that we conceptualize as intrapersonal, relational and systemic. Through these accounts, we became particularly interested in participants’ relationship to taking action and the way this changed over the course of their participation in the learning process. In the discussion, we examine this change in participants’ relationship to taking action through the lens of transformative learning theory.

**U.lab as a learning context**

Based on Theory U, the u.lab experience is concerned with identifying, engaging with and transforming the source of our most pressing environmental, social and spiritual challenges—our level of consciousness. The u.lab framework provides individuals and groups with a transformative learning process, framed by a U movement, that helps them to access and act from ‘deeper levels of knowing’ (see Figure 1).
Figure 1. Theory U: Seven ways of attending and co-shaping. This figure outlines the stages of the Theory U learning process (Scharmer, 2018, p. 23).

Movement down the left-hand side of the U focuses on deepening one’s capacity to see and pay attention to oneself, others and systems from a perspective that is both deeper and broader. In u.lab, a great deal of emphasis is placed on listening. U.lab participants take part in exercises, such as dialogue walks and peer coaching circles, to practice the deeper levels of listening introduced through the course content and are invited to use an online tool to reflect on and ‘rate’ their levels of listening each day for the duration of the course in order to increase their awareness.

Throughout the process, mindfulness is used to access felt- or sense-knowing. This becomes the primary focus at the bottom of the U, in the presencing phase. Here participants engage in stillness and an extended mindfulness journaling process designed to help them connect with their deeper levels of knowing. In the crystallizing phase that follows, exercises are provided to help learners crystallize the vision and intention that emerges from the previous phases.
The right-hand side of the U process focuses on moving into action. The emphasis here is on prototyping or “exploring the future by doing” (Scharmer, 2018, p. 118). Prototyping is action taken to explore or try out an idea in order to get feedback that will help move the work forward. In the latter part of u.lab, frameworks, exercises and online discussion support are provided to guide participants to step into action.

The pedagogy of u.lab is described as ‘online-to-offline’: the MOOC platform offers online content in the form of videos, readings and written exercises. Four ‘live sessions’ are streamed from the MIT campus and serve to reinforce the conceptual learning and connect the global community through story-sharing. In addition, u.lab encourages offline connection in various forms. It particularly supports the formation of local, face-to-face learning communities called hubs. These are described as, “place-based, local communities of change” (Presencing Institute, 2016) and provide a local context and holding space for learners who choose to join one.

The online-to-offline pedagogy in u.lab has makes a significant contribution to the advancement of online transformative learning pedagogy, particularly with respect to MOOC learning. While it was initially anticipated that MOOCs would constitute a significant transformative force in higher education (DiSalvio, 2012; Viehland, 2014), this expectation has largely not been realized (Al-Imarah & Shields, 2018; Robertson & Tasso eira de Aquino, 2017). Further, evidence of transformative learning outcomes within MOOCs is scant. In his critique, Brady (2013) argues that MOOCs, as they have been developed over the last decade, operate in stark contrast to the potentially transformative learning vision of the founders by, “breaking apart actually existing academic communities and refocusing on the individual’s acquisition of knowledge” (p.14). In the broader field of distance and online
adult learning, however, there is significant advocacy for transformative learning frameworks and pedagogy (Njiro, 2014; Meyers, 2008; Smyth, 2011; Zang & Dempsey, 2019), and an emphasis on the need for technology to serve pedagogy rather than drive it (Njiro, 2014; Smith, 2012; Smyth, 2011). Within the online transformative learning literature, Smith (2012) points out that much of that literature tends to be conceptual rather than providing detail about how to foster transformative learning in online environments, and she provides principles for doing so. Those authors who do explore the ‘hows’ of fostering online transformative learning tend to focus on the quality of interactions in online spaces both between students and between instructors and students (Rossi et al., 2015; Ryman et al., 2009). We have aimed to contribute to this knowledge base elsewhere by examining the components of the u.lab pedagogy that, when integrated, have been experienced by participants as an effectively fostering transformative learning (Pomeroy & Oliver, 2018). These include online content that is perceived to be powerful and relevant to learners’ current contexts, processes that help participants to connect in meaningful ways, and simultaneous local and global ‘holding spaces’, as described above. In this way, the u.lab can be seen as leveraging the accessibility offered by MOOCs and the power of in-person, local learning communities to increase the likelihood of transformative learning outcomes for participants.

**Theory U and Transformative Learning Theory**

As implied by the title of the MOOC, u.lab’s educational aim is explicitly transformative. Thus, we locate u.lab within the field of transformative learning theory as a frame for understanding interviewees’ accounts of their learning experience and consider what Scharmer’s work contributes to that field. In doing so, we recognize that the field of transformative learning is itself contested. The widespread appeal of transformative learning
as a concept has raised some concern that the term is at risk of becoming so diffuse as to lose its meaning (Illeris, 2014; Kegan, 2018; Taylor & Cranton, 2012; Tisdale, 2012). This has led to calls for an integration of various waves of transformative learning theory (Gunnlaugsson, 2008) and the creation of a more unified theoretical stance (Taylor & Cranton, 2012).

Current debates notwithstanding, we take as our point of departure Mezirow (2000), who remains widely recognized as providing the foundational conceptualization of transformative learning. He describes this learning to be “the process by which we transform our taken-for-granted frames of reference (meaning perspectives, habits of mind, mind-sets) to make them more inclusive, discriminating, open, emotionally capable of change and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action” (Mezirow, 2000, p. 8). Of particular significance to this study is Mezirow’s view of action. Critical reflection or self-reflection on assumptions combined with the opportunity for dialectical discourse to validate a best reflective judgement gives rise to a new frames of reference that then guide action in the form of new behaviours and roles (Mezirow, 2018, p. 118). He sees action as unfolding in a particular pattern: exploring options, planning a new course of action, acquiring skills, and provisional experimentation with the new action, which then leads to increased competence and confidence.

There has been considerable development of Mezirow’s work since its inception. Dirkx (2001, 2012) draws our attention to the role of emotion in learning, and the transformative power of bringing into consciousness that which was previously unconscious, using emotion as a gateway for this kind of insight (2012, p. 120). In addition to addressing the role of emotion in learning, Dirkx’s “soul work” also suggests a spiritual dimension to transformative leaning, a dimension emphasized by both Tisdell (2008, 2012) and Hart
(2014). Tisdell (2008) describes the universality of spirituality in the context of transformational change: “[w]hen defined as a journey or an experience leading toward wholeness, everyone has a spirituality” (p. 28). While most transformative learning theorists blend aspects of cognitive, emotional/relational and spiritual dimensions of learning, there is often an emphasis on, and deep exploration of, one dimension.

One of Scharmer’s key contributions to the field of transformative learning is to provide a robust framework for integrating the cognitive, emotional/relational and spiritual dimensions of transformative change. He describes the ‘three instruments of inner knowing’ in the following way:

An open mind is the capacity to suspend old habits of judgment—to see with fresh eyes. An open heart is the capacity to empathize and to look at a situation through the eyes of somebody else. An open will is the capacity to “let go” of the old and “let come” the new.

(Scharmer, 2018, p. 25)

The final dimension, open will, has both similarities and differences to existing conceptualizations of the spiritual dimension of transformative change. Scharmer describes open will as connecting to our deeper sources of knowing, or connecting to Source. He notes that this deep connection is described in a number of wisdom traditions and that each “name the fundamental level of experience and describe a deeper state of being that can become present within us and through us, both individually and collectively” (Scharmer, 2016, p. 185). He views the opening of the mind, heart and will as necessary conditions for learning from the emerging future—his second key contribution to the field of transformative learning.
Scharmer identifies two sources of learning: learning from what has happened in the past and learning from emerging future possibilities. He finds the first source insufficient to address the challenges of our times, stating that these challenges, “require us to slow down, stop, sense the bigger driving forces of change, let go of the past and let come the future that wants to emerge” (Scharmer, 2018, p. 10). To do this, we need to transform the way we pay attention to ourselves and the world around us, or, in Scharmer’s words, to change the field structure of our attention. He identifies four such fields:

1. *I-in-me*: what I perceive based on my habitual ways of seeing and thinking.
3. *I-in-you*: what I tune in to and sense from within with my mind and heart wide open.
4. *I-in-we and I-in-now*: what I understand from the source of what wants to emerge, that is, from attending with my open mind, heart and will.

(Scharmer, 2016, p. 11)

Thus, to be able to learn from an emergent future, we need to change not just perspectives, but the very source of perception, which means connecting to, broadening and integrating cognitive (mind), emotional/relational (heart) and spiritual (will) knowing.

Scharmer’s view that it is ‘the emerging future’ that is the source of transformative learning and new action can be placed in direct contrast to Mezirow’s view of action and its source described above. We will return to this contrast in the discussion section.

**Research Methodology**
This study was initiated by the second author in her role supporting u.lab within the Scottish Government. The purpose for the research was threefold: first, to better understand how people were using the u.lab platform and course, how they were experiencing the process and what impact it was having; second, to harvest stories that could be shared across the u.lab Scotland communities (see Going around the U, 2017); and third, to collect data for internal planning and resourcing.

Participants were invited to share the story of their u.lab experience. The invitation was sent out to all who had opted in to receive the additional u.lab Scotland content, approximately 300 in total. In addition, a number of participants were approached and invited to participate in an attempt to seek out both male and female participants as well as a participant group that represented the range of (a) sectors represented by participants, and (b) types of u.lab engagement (individual, small coaching circle group and hub).

Interviews took place November 2016 to January 2017. In total, 12 participants took part in nine interviews. Eight participants were interviewed individually and one group of five participants from the same hub were interviewed together. One participant took part in both the group interview and an individual interview. Nine of the participants were women and three were men, representing the gender distribution in the wider u.lab Scotland community (u.lab Scotland, 2017b). The study participants work in public health and social care, non-governmental and charity organizations, social enterprise and business. Interviews were open-ended, with some chronological prompts as a point of departure (e.g. ‘Where were you in your life when you first encountered u.lab? Did you come into the process with a specific intention? In which aspects of the course did you take part?’). The open-ended approach
provided a high degree of flexibility, enabling interviewer and interviewee to depart from the prompts and pursue themes that interviewees identified as significant about the experience.

The first author joined the study in the Spring 2017 to code and analyze the data set in consultation with the second. We chose grounded theory (Charmaz, 2014; Glaser & Strauss 1967; Strauss, 1987) as a methodological guide for the analysis that would allow us to ‘build up’ an understanding of participants’ experiences of the process and perceptions of the impact. Initially, open coding was used with six of the interviews. As Charmaz (2014) identifies, the purpose of initial coding is to open up the inquiry and mine the data for analytic ideas to pursue with further analysis (p. 114). Initial coding gave rise to a number of focused codes and potential analytic themes. The initial set of focused codes were then applied to the entire data set. Constant comparison of codes to data and codes to codes generated further codes and categories, and informed the emerging themes and theoretical direction of the analysis reflected in the findings and discussion.

We recognize there are limitations inherent to this study. The sample size is small and taken from one geographical region, so it may not reflect the experience of others in u.lab or in transformative learning processes more generally. In addition, participation in the study was framed as an opportunity to share and disseminate experiences. It is likely that the individuals who chose to participate in an interview were motivated to do so because their experience of the u.lab process had been positive. While the opposite is also possible, we did find that the individuals who volunteered to take part in the study tended to describe their experience as positive, often very much so. The findings should be viewed in light of this self-selection. Finally, each of the authors is actively engaged in the u.lab movement, the second author as a
member of the u.lab Scotland holding team and the first as the host of a u.lab hub in her university and, more recently, a member of the core team hosting the global u.lab MOOC.

Given our roles and the nature of the sample, we want to emphasize that this study is not an attempt to evaluate whether or not u.lab ‘works’ as a transformative learning process. Rather, we recognize that we are working with data from a group for whom the process was deemed impactful and our purpose here is to explore and, ideally, surface the nature of that impact.

Thus, we aimed to explore what can be learned about the experience of transformative change through a deep inquiry into individuals’ experiences. Of particular interest was the integrative learning framework of u.lab and the effort to blend cognitive, emotional/relational and spiritual learning, all in an online-to-offline format. Smith (2012) noted that most of the literature on online transformative learning focuses on perspective change, which we also found in a number of studies (Forte & Blouin, 2016; Nicols & Dewerse, 2010; Zhang & Dempsey, 2019). This raises a second research question: what kind of learning results from a learning process that emphasizes emotional, relational and spiritual learning as well as perspective change?

**Findings**

The accounts of participants in the present study describe a shift in consciousness that seems to change their way of being in the world. While two participants in the study described the process as “confirming” or “reaffirming” existing perspectives, the majority described significant changes to the way they perceive themselves, their relationships, and their systems. The change in perspective in turn impacted their feelings about and actions within
these domains. We have organized the findings into three broad categories: intrapersonal, relational and systemic.

*Intrapersonal*

One level of impact reported can be thought of as internal, reflecting changes in the way one thinks and feels about oneself and one’s world. Several participants commented on a shifting sense of self, for example seeing themselves differently or more clearly. This also includes feeling more oneself or integrating different aspects of oneself to gain a greater sense of wholeness.

**Theresa:** I found that quite profound, thinking what does your younger self make of you now and what does your older self make of you at this point, and that actually changed the way I think about me, forever I think.

**Elaine:** I’ve trained in counselling, I’ve trained in coaching and it felt almost like there were these two parts of myself and I wasn’t quite sure how they fit together and in that process of drawing out this prototype idea, I went, ‘Aha, that’s how those bits fit together’. So, it was a moment for me both in terms of what could potentially happen but also in terms of how I viewed myself and how these parts of myself kind of fit together.

The experience of seeing oneself more clearly was not always comfortable. Several participants commented on noticing disconnects in their systems and in their own lives.
Nicola: It’s made me think a lot about the disconnects in my own life, and disconnects in work as well. So, that has been a really profound bit of thinking for me and reflection for me, and I thought, you know, just looking at people, just passing people….We don’t even connect in work, we don’t even look at each other in work. We have this superficial interaction. So, that’s made me very thoughtful and it’ll stay with me for a long time, I think, that level of disconnectedness. It brings with it a level of sadness, I think, because we’ve got there as human beings. And to find, because you always think, ‘Oh, that’ll not be me,’ and then you think, ‘Actually, it is too.’

The comment above reflects the affective nature of the learning—the feeling of discomfort that surfaces from seeing disconnects in one’s interactions with the world. Other comments reflect the cognitive aspects of the learning as they imply that a change occurred in the structure of participants’ thinking, including seeing their systems or situations in a new way.

Peter: Some of the change that we’re, probably around the… periphery of our sector, I’ve been thinking more broadly about some of that, and what that means and, you know, what the future of our sector looks like, what the future skills will look like, and that’s been quite interesting.

Laura: So, we’re trying to help people get from early recovery into sustainable recovery. So, that was the vision of it by using the wisdom of the community more deeply, and to offer a space for that. So, we started to do that and that worked really well and we could’ve kept on doing that until somebody said, ‘Doesn’t everybody need recovery?'
The comments above hint at the relationship between inner change and outer action. In these examples it seems that a shift in one’s consciousness or thinking about a situation is a precursor to changing outward behaviour.

*Relational*

Given the emphasis on listening in the u.lab process described earlier, it is perhaps unsurprising that the most commonly reported outcome of participation was deeper listening. Deeper listening includes the capacity to be aware of one’s own level of listening, listening more open-heartedly, with greater empathy, less judgement and a genuine desire to understand the other.

**Anna:** I’ve realised that when I thought I was a good listener I’m not a good listener at all. So, that, and I’ve realised that that needs practice and that needs coming back to over and over and over again to be aware of that, the power of listening, and really listening, to my family as well. We all go into this disconnected mode, so, that’s been really powerful and that was a real wake-up call for me as well …

The capacity to listen more deeply and be aware of one’s level of listening seemed to increase participants’ capacity to hear perspectives quite different from their own.

**Stuart:** And I think it’s a kind of process, it’s like continually trying to use the tools and to embed it and to keep remembering to listen. I mean this morning I
kept saying, ‘Right, keep listening,’ even though it was very hard, continually fighting my anger, still wanting to shout at somebody.

Karen: I think coming together and actually working together and listening to each other just, how do we do this together then rather than me battling you, you know. So, it’s taken away the—and I don’t think I was a huge ‘them and us’ person—but it was getting that way because things were really so difficult, you know. So I think it’s, again the letting go bit’s important but also that step back, build relationships, this can happen differently.

Focusing on listening, empathizing and understanding other perspectives changed participants perceptions of the very purpose of an encounter with another, shifting the nature of the interaction from something habitual or transactional to an opportunity to build relationship.

Jenny: I think for me the sort of, the awakening that u.lab brings is that the heart and, you know, opening the heart so that you can actually try and genuinely engage with people in a way that really will make a difference.

Theresa: I’m using u.lab in terms of an approach [at work] and it’s working very, very well. And I think that the kind of deeper listening where I’m really listening to what people are hoping to get out of things, or even their approach, you know, the, kind of, walking in their shadow and understanding their approach and how they deliver a service, so that my own understanding is better enhanced and I can empathise better.
Just as a shift in perspective seemed to lead to different ways of relating to others, these different ways of relating then seem to extend beyond interpersonal interactions to wider systems.

Systemic Change

The differentiation between change in interpersonal relating and change in systems was not always clear-cut. The changes seen in systems often began with subtle changes in the interviewees’ manner of relating to others. Many described bringing a different quality to their conversations. The conversations were founded on an intention to engage in deep or generative listening, and the interviewees report designing processes and spaces to engage in this kind of listening as well as asking different kinds of questions in order to hold more meaningful conversations.

Peter: Rather than talk about the skills you need for work today, which would probably have been the sort of thing to do in the past, it was what are the skills we need for the future and what are the, kind of, capabilities and attributes that, not just our industry would be looking for, but, you know, just generally out there. [We asked] ‘What is it that you value? What’s important to you?’ So, it was probably asking that question in a completely different way and, again, it might have produced a different result to the usual stuff like teamwork and communication skills and all that.
Kay: So, when we were doing the u.lab stuff the strand that ran alongside that was we also put out a kind of general call and said, ‘Tell us what you think would be part of a good community for you. What does a community that works well for older people look like and feel like?’ And people told us things, some of which were ones we expected and some of which were ones we completely didn’t expect, which is the joy of talking to people and saying, ‘How does life look to you?’.

In addition to creating a change in the nature of the conversation in a given system, there was also a shift in one’s perception of who needs to be included in the conversation. Reaching out to a broader range of people both within one’s own system and outside of it was a commonly described outcome for the interviewees. For some, this included reaching out to those at the margins of the system, something emphasized in the u.lab process.

Graham: So, I think the listening, I think the listening. I think the realisation that there’s more than just the public sector and the third sector out there. That there is actually a business community who do actually also care about society, and reaching out to them, and that’s become apparent from my recent experience that actually they really do care, and do you know what, it’s about time we started, and do you know, our public sector and third sector needs to drop its attitudes towards private sector, not the other way round.

Laura: We need a lot more compassion, and we need to include actively performing drug users in our circle of our concern, without requesting that they give up. That was really new for me, that was a new perspective. So, in terms of
that, using the tools to surface the margins, stuff from the margins and bringing people from the furthest margins, I just thought, ‘Yes’. I’ve always made it conditional. I didn’t realise I’d done it, that of course they want to be giving up, well some people don’t and does that leave them out the circle of policy concern, no, it doesn’t. Does that leave them not having a voice? No, it doesn’t.

Among the interviewees, a wide variety of new initiatives–or prototypes–were reported. Examples of these include a community organization with a newly acquired facility inviting residents in to co-plan and design the space, an initiative to place public health analysts in health and social care offices to work together with staff to improve services, and the expansion of a popular education platform run by people in recovery from addiction to make it available to the wider public and not just those in recovery. While the scale, type and domain of action differed, an interesting finding was that the actions tended to have in common qualities related to the themes of reaching out to wider groups of people, creating spaces for meaningful conversation and/or more collaborative ways of working.

**Graham:** We have 34 neighbourhoods within our two towns and we want to go and reach out to all of those neighbourhoods and engage with those neighbourhoods and those residents to say, ‘Actually, what’s, what assets do you have in your area? What’s good in your area? And what do you think’s missing? What would you like to see to make this a really good neighbourhood to live?’ We’ll produce a full asset map of the whole of the two towns and we’ll share that with anyone who wants it. But what we will have engaged with is a whole new set of friends who live in those areas and we can work with them and support them. They can support us too.
**Jenny:** So, we’re inviting clinic staff, both consultants and specialist nursing staff, to shadow the third sector services on their day to day work. So that would mean going into people’s houses, which clinical staff—not all clinical, I mean some clinical staff do, you get district nurses that do - but sometimes the hospital-based staff, even if they’ve maybe done that in the past, you know, it’s not saying they’ve forgotten what it’s like, but it’s just about re-engaging them with the reality of the patients that they’re working with.

We connect the prototypes described here to the learning described above in the following way: a change in perspective about the purpose of an encounter provided motivation for deeper listening. Listening differently helped participants to see and think about systems and issues with a different understanding. This shift in consciousness or perspective led to action that was more inclusive and collaborative.

*Action Confidence*

Up to this point, we have discussed specific actions reported by interviewees, such as listening differently, asking different questions, making changes to one’s way of working. Yet what we believe is one of the most significant outcomes for interviewees can be thought of as a *changed relationship to taking action* in general. We believe this to be significant because a changed relationship to taking action requires a change in consciousness about self, relationship and system/issue. The finding that the interviewees’ began to engage in action differently first surfaced in their use of the words ‘courage’, ‘bravery’ and ‘confidence’ to describe the impact of u.lab in their work and lives.
**Kay:** u.lab did big exciting things for us. The conversations we had around the topic led directly to us building up bids and to several new projects so that led to good things. What it did to us as an organisation, I think one of the main lessons I think we got from u.lab was be braver, just, you know, stop worrying about things so much and just try it and see what happens.

**Theresa:** Even just the comments that people were making gave me enough confidence then to go away from that and project myself a bit harder, or make my voice heard a bit louder in terms of where my own project was going, and my goodness what a revelation that was because things really turned around, instantly, you know. So, I felt that that was quite a powerful experience for me.

Feeling greater comfort with moving into action without knowing exactly where that action would go was also a strong theme, and seemed to lead people to feel more willing to take action. Many accounts reflect a shift from ‘planning so as to get things right’ to ‘trying something new in order to learn’.

**Elaine:** I think in terms of work I’m much more in a place now to just give things a go. I think I’ve, I mean I’m generally a very reflective person and sometimes when you’re a reflective person that can lead to you not taking action very quickly and I think the learning from u.lab and also that exploration of creativity has kind of really freed me up to go, ‘Well, do you know what, I’m just going to do this and there’ll be learning out the back of it and then we’ll do it differently
the next time’. And, kind of, that process of innovation and change, I’m able to embrace in a way that probably I wouldn’t have previously.

**Anna**: Where I see it is, soldier on without feeling that it’s a lost battle. It’s, for me, it’s an exciting, it’s exciting territory. I don’t see it as a battle as such, I see it as unexplored territory and there’s people who’re willing to be fellow explorers and it’s okay. It’s unchartered waters, and yet it’s not, if that makes sense.

In response to what is perceived as an effective framework for moving into action, several participants report feeling excitement, hope and even joy at the prospect of taking action in the future.

**Kay**: For me it’s just added a whole other joyful range of useful books and contacts and reports to follow up and that’s, it’s the kind of thing I find helpful because I tend to go back and re-read things and read the footnotes of the footnotes of the footnotes, because that’s where you sometimes think, ‘Aha, that makes sense of this,’ and I think for me it was that filling in that extra layer or positive ways of making change and supporting change to happen.

**Nicola**: It gives you hope. It really has given me hope, in the sense I’d got to that stage in my professional career I thought, ‘I’m going to work with dogs or something’. Because it’s too hard, you know? I’m not making progress, we’re not making progress. What are we doing here? But this has given me a hope to really keep working.
Anna: It’s the antidote to scunteredness.

As mentioned earlier, two participants describe the impact of u.lab as reinforcing and affirming existing understandings and practices, and enhancing work already planned or underway.

Peter: I’ve found that really valuable because I think, ‘Yes, that’s exactly what I think and feel,’ you know, maybe not all of it, but, you know, there’s a huge amount in there that has really just reaffirmed things for me and I’ve found that to be a really useful exercise because I think, ‘Actually, you know, I’m not away out on my own over here in thinking that way and feeling a bit, you know, ill at ease with it,’ I actually feel quite reaffirmed and think, ‘Well, actually, no I’m going to go and ask some of those questions,’

These points taken together can be thought of as an increase in participants’ “action confidence.” We believe that this change in interviewees’ relationship to taking action is the most significant of our findings because it embraces, and indeed requires, learning in a number of domains.

Discussion

Jarvis (2009) states, “Fundamentally, it is the person who learns and it is the changed person who is the outcome of the learning, although that changed person may cause several different social outcomes” (p. 24). The individuals in this study describe a number of changes, including a change in the way they see and think about themselves and their systems, a
change in the way they interact with, perceive and pay attention to others, and a change in the action they take toward that which is more inclusive and collaborative. In this discussion, we wish to draw attention to a finding we consider most intriguing, namely the interviewees’ description of an increase of what we are calling “action confidence”.

*We define action confidence as the courage and willingness to act where one might not have acted previously stemming from a shift in one’s thinking about the nature and purpose of action.* This shift can be characterized as a move away from action that is more performativ, focused on ‘getting things right’, to action that is more experimental and focused on ‘acting to learn’. Further, and perhaps most significantly, action confidence arises when individuals develop the capacity to access different forms of knowing to inform and shape their action and to bring those forms of knowing into coherence.

The epistemological change underlying action confidence is the foundation for our claim that action confidence is an indicator of transformative learning. Kegan (2018), in considering ‘what form transforms’, states, “[a]t the heart of a form is a way of knowing…thus genuinely transformational learning is always to some extent an epistemological change rather than merely a change in behavioral repertoire or an increase in the quantity or fund of knowledge” (p. 35). Action confidence is fundamentally about a change in the epistemology underlying action.

Our conceptualization of action confidence builds on Scharmer’s (2001) earlier work on the epistemology necessary for effective action in our current reality. Writing in the context of management leadership he describes the challenge leaders face:
The challenge is to develop the capacity for “precognition”, the ability to sense and actualize emerging potentials. To do this, leaders must be able to see the emerging opportunities before they become manifest in the marketplace. This kind of knowledge can be thought of as *tacit knowledge prior to its embodiment*, or “self-transcending” knowledge.

(p. 137)

He further describes self-transcending knowledge as “knowledge about the *sources* or ‘place’ from where thought and action come into being. The focus is on the primary ground from which human action arises in the first place” (p. 141). He views self-transcending knowledge as the scarcest resource in organizations and the most difficult to attain, yet essential for generating action necessary for meeting current challenges.

This view of action and its source can be juxtaposed with that of Mezirow (2000, 2018). For Mezirow, the impulse to take action arises from a transformed perspective. As one’s frame of reference changes, new action is pursued because it is reasoned to be more true or justified (Mezirow, 2000, p. 8). For Scharmer, new action comes into being not from reasoning, but from making contact with different levels of knowing, particularly those which precede cognitive thought and give rise to it. This means drawing on our capacities to know through our felt sense and intuition as well as cognition. These capacities are applied to knowing our own experience, but also used as a gateway for perceiving the collective experience where “perception begins to happen from the whole field” (Scharmer, 2016, p. 139). Scharmer draws attention to the level of knowing that exists prior to its embodiment as well as the process by which this knowledge coming into awareness. In doing so, he emphasizes the importance of accessing knowledge as it emerges, which he frames as learning from the
emerging future. Where Mezirow sees new action arising from a determination of what is most true, Scharmer views the source of action as perceiving what is emerging and in need of action in order to fully manifest.

These different frames have a direct impact on what confidence means in the context of taking action. From Mezirow’s perspective, action is planned, necessary skills are developed and confidence comes from demonstrating competence in a particular new action, behaviour or role (2018, p. 118). For Scharmer, the precursor to new action isn’t planning or skill building. Rather, action arises from accessing and integrating all forms of knowing in order to perceive “a future possibility that depends on us to come into reality” (Scharmer, 2016, p. 161). Taking action is then a learning mechanism to “explore the future by doing” (Scharmer, 2018, p. 25). Action and learning are in direct service of one another as learning-through-action leads to more adequate action, which in turn generates further learning. Confidence, in this case, isn’t about performing well but rather a willingness to step into new action, inspired by a connection to multiple forms of knowing, in order to learn.

We argue that the courage, willingness and sense of hope with which the interviewees in this study describe moving into action, and which characterize action confidence, are the result of accessing and integrating different forms of knowing. In particular, in a world where conceptual knowledge is privileged, the learning process brings into consciousness and validates emotional/relational and spiritual/intuitive knowing. Creating coherence between these different forms of knowing enables people to source their actions from knowing that connects with their deepest experience. When learners have a means to connect with, represent, and give meaning to that experience, we see an impact on the way they subsequently move into action. They are more willing to act without necessarily knowing the
outcomes, that is, to act in a way that isn’t focused on performing but rather on learning. The focus on learning then further feeds knowing in all its forms.

**Conclusion**

In this study we set out to explore the nature of transformative change that results from participation in a learning process that integrates cognitive (mind), emotional/relational (heart) and spiritual (will) learning. We view action confidence to be a direct outcome of this integration. The confidence to take action comes not from the ability to perform well, but rather from the capacity to act from a place of connection to all our forms of knowing. We can think of the change as meta-epistemological. In addition to specific shifts in interviewees’ ways of knowing their systems, relationships and worlds, there seems to be a shift in the way that knowing on a spiritual/intuitive, emotional/social and cognitive level are connected to one another more consciously and with greater congruence than was previously the case. It is in developing capacity to access and bring coherence to different ways of knowing that action confidence arises. Said differently, action confidence can be seen as the manifestation of epistemological coherence or the integration of different ways of knowing. As such, an increase in learners’ action confidence can be regarded as an indicator of transformational change.

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