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# An Illustration of Cooperative Inquiry Design: Finding Our Way to Precious Knowledge, Together

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Although transpersonal psychology and practices are inherently holistic, vitally informed by an ontology of interconnectedness, and fundamentally open to practices that challenge hegemonic norms in research practices, the use of participatory methods that implement these ideals, remains scarce. The purpose of this paper is to reveal the details of the transpersonal research I co-conducted, which used Cooperative Inquiry to analyze the transpersonal phenomenon of psychospiritual transformation, for researchers and practitioners who seek an example to guide their investigations. My intent is to stimulate enthusiasm for this method by providing an overview of cooperative inquiry followed by a detailed account of the decisions and activities involved in the research design, data collection and analysis procedures, and validity measures complemented by a brief account of the results.

**Keywords:** *cooperative inquiry, participatory action research, transformation, integration, method, transpersonal psychology*

**A**cross time, people have gathered together in a circle of inquiry to discern knowledge erudite enough to guide communities and individuals. The Chichimeca lineage of ancient Mesoamerica calls this quality of wisdom, *precious knowledge* (Magaña, 2017, p. 185) because it depicts fundamental, essential, or irreducible information—the source of a phenomenon’s existence, inclusive of its complexities. All cultures have precious knowledge. Elders of ancient Polynesia, for example, discerned a sacred practice called *lomilomi* that is known as a healing massage. This cultural knowledge is, however, far more than a massage; it is a way of life connected to nearly all aspects of island living (Chai, 2005). Precious knowledge is highly valued because it is ordered, grounded, quintessential, and illuminates the intricacies of a mystery or even source of life, and it may even be deemed sacred.

Disciplines also produce precious knowledge. In the context of modern psychology, Sigmund Freud’s discoveries of the id, ego, and superego, Mary Ainsworth’s conceptualization of attachment, William Cross’ nigrescence model that founded racial/ethnic identity psychology, Mamie

and Kenneth Clark’s “doll test” that helped overturn school segregation, or Ken Wilber’s discernment of an integral theory of consciousness, are just a few examples of what some might deem precious knowledge.

The arduous journey a scholar must take to grasp precious knowledge requires the totality of her being: a keen commitment to understanding the depths and even the source of a phenomenon by applying mindful and disciplined focus, open heart and mind, and attuned body—reifying its conceptual value. Might there be another way? My experiences as a coresearcher using *cooperative/collaborative inquiry* (CI) methods showed me a distinct means through which a group can generate outcomes beyond anything one researcher can conceptualize or even imagine, because of the ways in which it is achieved, together. Might a CI be a means through which moderns have the potential to access precious knowledge?

A CI is defined here as a collaborative method to systematically investigate a research question as a group of inquirers by engaging in cycles of action and reflection to co-construct

knowledge based on shared lived experiences and group analysis (Bray, et al., 2000; Heron, 1981, 1996; Heron & Reason, 1986). The purpose of this paper is to assist researchers interested in employing CI by describing key considerations, decisions, and activities required to design and implement a CI study and illuminating the narrative with examples from my doctoral research. My intention is to embolden use of CI by demystifying its concepts, design, practices, and ethic.

This paper begins with a brief synopsis of participatory approaches, cooperative and collaborative inquiry, and the concept of extended epistemology. The bulk of the paper is a detailed account of CI design, data collection and ongoing data analysis, validity measures, formal data analysis using illustrations from my research, which analyzed the transpersonal phenomenon of transformation after an experience of travel. Both collaborative inquiry and my doctoral research (Ross, 2008, 2017) are heavily influenced by cooperative inquiry. For ease of discussion, I refer to my use of collaborative and cooperative inquiry as CI (Ross, 2008, 2017). While I draw on my work to support the aims of this article, I point interested readers to my previous publications for more information. (Ross, 2008, 2010, 2017, 2019a, 2019b, 2019c). For those who plan to employ CI, I also suggest readers consult founding publications that convey necessary detail (see Bray, et al., 2010; Heron, 1988, 1996; Heron & Reason, 2002; Reason & Rowan, 1981).

### **Brief Synopsis of Participatory Action Approaches and CI**

Participatory action research encompasses a spectrum of research approaches that have evolved throughout the latter half of the 20th century. The basis of this approach “rests on a belief and experience that all people . . . accumulate, organize, and use complex knowledge constantly in everyday life” (Greenwood & Levin, 1998, p. 4). Research that taps community members’ knowledge promotes values of democracy and social change. Participatory action research is documented as the preferred approach when the research aims toward social, educational (Kemmis & McTaggart, 2005), political (Fals Borda, 2002; Freire, 1970), ecological (Reason,

1998; Reason & Torbert, 2001), epistemological (Shah, 2001), or transformational change (Reason & Torbert, 2001).

Cooperative inquiry is a research strategy couched within participatory action research. John Heron (1981, 1988, 1996, 2001) established that research could be done with people rather than about people. Peter Reason (1993, 1994a, 1994b, 1998; Reason & Rowan, 1981) contributed greatly to Heron’s foundations, and Heron and Reason (1986, 1995, 1997, 2002) produced joint publications as well. This approach to inquiry involves a small group in “reciprocal relation using the full range of their sensibilities to inquire together into any aspect of the human condition” (Heron, 1996, p. 10) as *coresearchers* (Yorks & Marsick, 2000, p. 266). The group creates a context with norms of shared responsibility and employs democratic decision-making. Members of the group co-jointly determine the inquiry question(s) and data collection methods, and then gather and analyze the data that emerge.

Collaborative inquiry, a similar form of participatory human inquiry, was inspired by cooperative inquiry and developed in part to provide the authors with flexibility in how they chose to implement research procedures and because they found the word collaborative carries with it certain sociocultural advantages (Bray et al., 2000, p. 6). For the purposes of research, the acronym of CI draws upon both cooperative inquiry (Heron, 1981; Reason & Rowan, 1981) and collaborative inquiry (Bray et al., 2000) processes and honors the “synonymy” of approaches (Kasl & Yorks, 2010, p. 316).

Participatory approaches such as CI assume that knowledge is contextual and “relative to how it is shaped by the knower” (Heron & Reason, 1997, p. 280), which deviates from positivistic strategies that suggest an empirical reality can only be known through objective measurement and reason. CI upholds a subjective-objective ontology wherein subject and object are interdependent. Moreover, subjectivity and objectivity are preceded by an intersubjective field, a context of shared meanings that is “linguistic-cultural and [at a deeper level] experiential” (Heron & Reason, 1997, p. 280). While postmodern or critical theory approaches enlist the voices of research participants, the researcher is

still the one who analyzes, synthesizes, constructs, and reports the knowledge thereby delimiting the knowledge through the writer's lens. In contrast, CI offers a democratic group heuristic approach wherein the coresearchers control and share knowledge-production and analysis processes and data is emergent, perceived through personal and shared complex gaze, and is fully intersubjective.

**Extended Epistemology**

Instead of generalizing, a cooperative inquiry uniquely values learning from and producing practical knowledge and action based upon conceptual knowledge. The results are limited because a CI generates data out of personal and common experiences unique to a particular group of coresearchers. Even though these limitations exist, it is important to note that scholarship can continue to be the overall aim of CI research, because ultimately, it is knowledge-in-action that affects change (Heron, 1996). This unique research endeavor is called the *primacy of the practical* (Heron, 1996) wherein the coresearchers privilege propositional outcomes as new competencies in action.

Consummating knowledge that is practical is made possible by following a fourfold extended and cumulative epistemology (Heron, 1992, 1996;

Reason, 2003), which engages four modes of the psyche correlating to each epistemology (Figure 1). *Experiential knowing* occurs through direct encounters involving the senses and feelings, and is typically prearticulate by engaging the affective and imaginal modes of psyche. *Presentational knowing* emerges out of experiential knowing as the first form of expression by using the imaginal and cognitive modes, and presentational expression can take various forms such as storytelling, art, schematics, or movement. *Propositional knowing* draws upon use of cognitive analysis and synthesis such that concepts and ideas form with increasing complexity by employing the conceptual and practical modes. Lastly, *practical knowing* is the culmination and full incorporation of the knowledge into intelligence-based daily actions by implementing the practical and feeling modes.

The upward arrow in Figure 1 shows the movement that knowledge derived from lived experience can have if it is coalesced through cycles of action and reflection to become practical knowledge. The downward arrow shows how practical knowledge loops around to become further grounded as it feeds propositional, presentational, and experiential knowledge again. Consummating

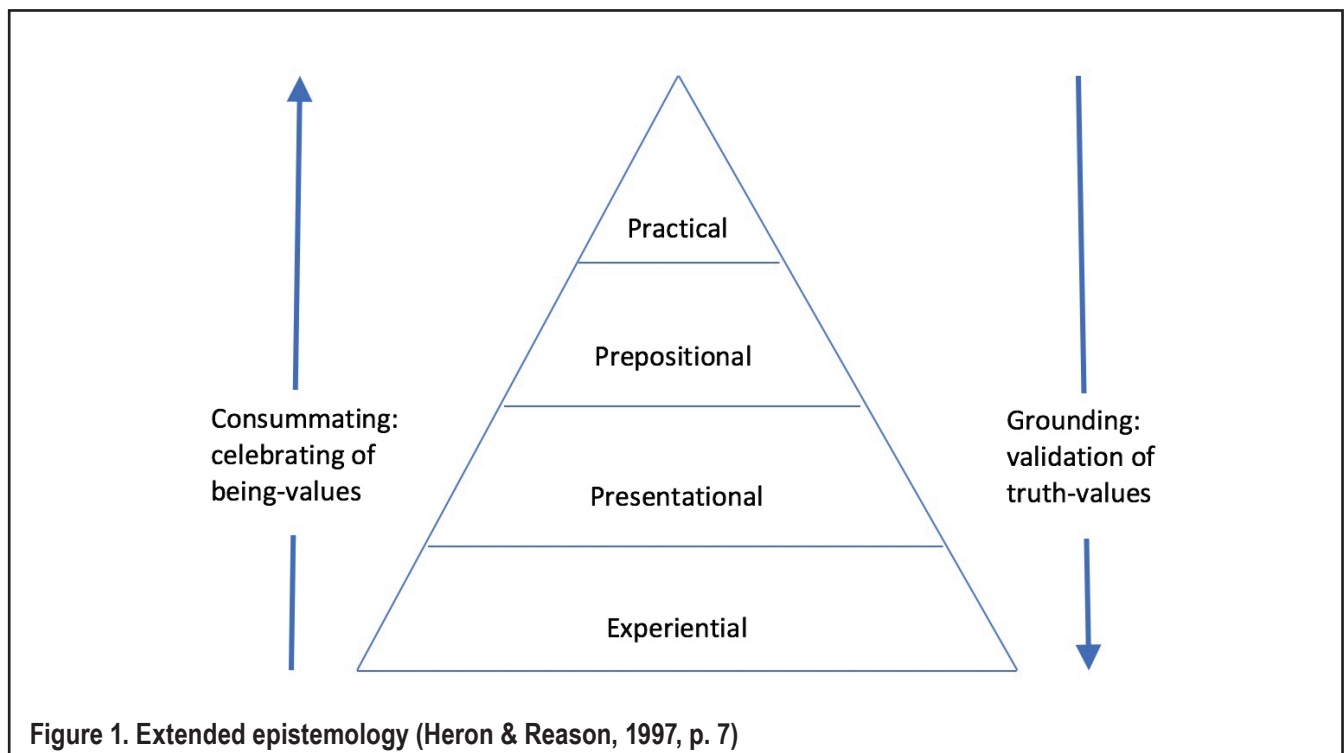


Figure 1. Extended epistemology (Heron & Reason, 1997, p. 7)

and grounding knowledge creates congruence between the four epistemological aspects and is how a cooperative and collaborative inquiry can establish validity—(Heron & Reason, 1997, p. 6). A CI challenges prevailing norms that privilege propositional knowledge by recognizing practical knowledge as the “final outcrop of this up-hierarchy of knowledge, from experiential to presentation to propositional... [because] practical knowledge...cannot exist in its extraordinary range...without being grounded” (Heron, 1992, p. 172) in “deeply contemplated experience” (p. 4).

Once launched, the research involves iterative cycles of data collection in the form of action—agreed upon activities to experientially explore the topic—and reflection. The action/reflection cycles tend to contain: (a) action (i.e., exploring, doing, and attending to daily living with attention upon the inquiry); (b) reflection/analysis (i.e., group meetings that use reflexive exercises through multiple ways of knowing and ongoing data analysis); (c) revision/planning (i.e., planning for the next action phase); and (d) self-reflexivity (i.e., occurring throughout).

Action/reflection cycles conclude based upon the inquiry question and purpose, and according to the group’s decision as to the number of cycles warranted to sufficiently respond to the question (Heron, 1996). After the inquiry group completes the last research cycle, the coresearchers can begin formal analysis of the data, distinct from the ongoing data analysis that coincides with data collection, from a vantage point inclusive of the entire process. Formal data analysis involves *making sense* of data, to examine the question “What have I been through?” in a way that involves contemplation, analysis, and eventually articulation (Rowan, 1981, p. 99) and *making-meaning*, to conceptualize what the group discovered (in the form of propositional and practical knowledge).

### **Implementing CI Using Example Research**

The subject of our CI (Ross, 2008) was inspired in part, by a recognition that an experience of personal transformation does not necessarily guarantee permanent psychological change (Cushing, 1999; Paterson et al., 1999). Although Jack

Kornfield explored the concept in his book, “After the Ecstasy, the Laundry” (2001), a review of literature found no study that has empirically examined how transformative, life-changing experiences are integrated into daily life (i.e., upon return home or to routine).

The aim of our research was to address this literature gap by investigating the lived experience of integrating a personal transformation that occurred during or as a result of international study abroad travel into daily life. Drawing upon an analysis of literature spanning more than eleven disciplines, personal transformation was defined in this research as:

A dynamic sociocultural and uniquely individual process involving experience(s) of expanding consciousness through cognitive, psychological, physiological, affective, and/or spiritual structures, rendering a shift in the form of one’s thinking, doing, believing, and/or sensing due to the novelty of the intersection between the experiencer, the experience, and their location in time. (Ross, 2008, p. 29)

Following CI procedures, coresearchers convened over a period of 13 months to examine their daily lives to answer the research inquiry question, “What is our experience of integrating transformation?” (Ross, 2008, p. 4).

The results contributed to theory in transpersonal psychology (Wilber, 1980/1996), clinical psychology (Fosha, 2000; Fosha & Osiason, 1996), including transformative learning (Mezirow, 1978), sojourner adjustment (Gullahorn & Gullahorn, 1959), and rites of passage (Turner, 1969; van Gennep, 1909/1960).

### **Design**

Before the coresearcher group forms and cooperative decision-making starts, the initiating researcher must make a number of preliminary methodological decisions regarding the structure and procedures of the CI (Bray et al., 2000; Heron, 1996; Heron & Reason, 2002). Once formed, the coresearcher group makes the remaining design selections collaboratively (i.e., co-determined data types and validity measures). These decisions, while helpful, need not be rigidly adhered to because a



priority of CI is nimble attention and adaptation to relational concerns, insights, and experiences. For a full account of design decisions in CI, see publications such as Heron (1996) and Bray et al. (2010).

**Preliminary Decisions.** The primary purpose of our research (Ross, 2008, 2017) was to be informative, wherein the main findings are “propositions about the nature of a domain” (Heron, 1996, p. 48). Our goal was to produce rich descriptive, explanatory (propositional), and expressive (presentational) drawings, “imaginal symbols of the significant patterns in our realities” (p. 37). Concretely, I sought to share results via my dissertation and members of the inquiry group hoped that our findings may also benefit others. Our purpose was distinct from CI types delineated by Kasl and Yorks (2010) that have a primary purpose of transforming one’s core identity, personal growth, or professional development. Specifically, we studied a phenomenon larger than ourselves in the sense that transformation is mystical, occurring both within and beyond human influence; transformation happens spontaneously. As such, we relied heavily on heuristic practices.

This study was an *internally initiated inquiry*, which means that as the initiating researcher, I had a personal experience of the research topic and was a participant in the inquiry process, and thus was a full coresearcher. In addition, this study employed *full form inquiry* (Heron, 1996) wherein all people, including the initiating researcher, are involved wholly as coresearchers and cosubjects. Despite the potential problematic nature of juggling responsibilities as both the initiating researcher obligated to university requirements and as a coresearcher, I entered into the processes completely as a coresearcher.

This study was a *mixed role inquiry* (Bray et al., 2000; Heron, 1996), meaning that coresearchers had various roles and relationships to the research, including as academic instructor, undergraduate student, graduate student, significant other, and teacher’s assistant. Importantly, following Kasl and Yorks (2010), I monitored closely my thoughts, beliefs, values, and feelings in order to mitigate the potential problems due to my role as a doctoral student and

the university requirements I was adhering to. My aim was to relinquish power and control to the best of my ability while acknowledging the reality that the research process and product was influenced by the university requirements and my written report about the group’s knowledge.

The next two design selections involved how this study gathered information from experiences both within and external to the CI group. The study was an *outside inquiry with elements of inside inquiry*. During the reflection phase, coresearchers congregated to discuss, share, and explore experiences of self in relation to the topic and the focus in the action phase was on the daily lives of the coresearchers outside of the group, which Heron (1996) identified as an *outside inquiry*. In *inside inquiry* (Bray et al., 2000; Heron, 1996), coresearchers are “studying their individual and collective experience of group phenomena” (Heron, 1996, p. 43). The final design selection involved what Heron (1996) called an *open boundary* during the action phases, meaning that interactions with other people, events, and situations that occurred in the daily lives of coresearchers outside of the inquiry could contribute data or feedback that affected the inquiry.

Before we began the study (Ross, 2008, 2017), I needed to estimate the approximate *duration of the study* so I could inform prospective coresearchers about the time commitment. I estimated that the research would require a minimum of eight action/reflection cycles (i.e., inquiry meetings, twice per month for four months), well within the suggested five to eight minimum necessary to “give enough room for useful outcomes without being too demanding on time and motivation” (Heron, 1996, p. 95). However, once we became engaged in the study, we chose to continue beyond our original agreed timeline because we had not yet reached a clear answer to our research question, and all coresearchers wanted to continue until we did, which occurred after 13 months.

Finally, the initiating researcher determines the *criteria for inclusion* in the study. For the example study (Ross, 2008, 2017), people who considered serving as coresearchers in this study needed to self-evaluate and verbalize that they: 1. Experi-

enced some sort of internal change because of study abroad travel, but did not need be able to articulate the precise nature of the change; 2. Wished to explore, share, learn, inquire into, and reflect upon their daily living that occurred before, during, and upon return from the study abroad; 3. Agreed to engage in group processes while also noticing experiences of self, other, and the immediate environment during daily life; 4. Agreed to participate in discourse and group-generated reflective activities that might involve noncognitive activities and expressive art; 5. Agreed to cocreate and implement group chosen action in the context of their daily lives; and finally, 6. Agreed to verbalize and sign consent indicating that they genuinely and freely wanted to engage in the collaborative study.

**Initiating the Research.** The research begins by soliciting and securing a *coresearcher group* (CG). In order to inform, orient and establish the CG for our study, I invited all interested candidates to an induction meeting. The purpose of the meeting was to provide an overview of the proposed research question, method, and participation requirements. In our study, I asked candidates to contemplate the invitation and return to a follow up meeting if seriously interested. The second meeting consisted of a question and answer session, further review of the method using handouts and guide, and instructions to contemplate prior to the first research meeting, “What are my yearnings and intentions for participating in this research?” Candidates who self-selected to participate in the study were given a research journal with which to document information.

**Coresearcher Selection.** Seven individuals met all the criteria and elected to participate in the research, three of whom went to Costa Rica and four to Peru for study abroad. The group size was within the norms of a cooperative inquiry range of 5 to 15 coresearchers (J. Heron, personal conversation, February 28, 2016), small enough to allow for all voices to be heard and large enough to have diversity of experience (Fusch & Ness, 2015), and within desirable data saturation (Suen, Huang, & Lee, 2014, p. 105). Two of the seven individuals (one being myself) participated in both travel courses. The group of seven coresearchers consisted of all females, with

an age range of 23-37 (when the research began), a median age of 29 years old, and ethnicities of Mexican ( $n = 1$ ) and White ( $n = 6$ ). The coresearchers lived in different cities spanning a distance of 13–75 miles from each other.

### **Data Generation and Ongoing Analysis**

A CI research process often begins with a question proposed by the initiating researcher; however, it is important that coresearchers critically evaluate, revise or recreate the question, in order to produce a question that each person feels compelled to examine. For Ross (2008, 2017), our group followed these procedures, and by the third month had chosen to keep the initiatory question as I had initially presented it, namely, “What is our experience of integrating transformation [upon return home from the study abroad experience]?” We each articulated why we chose to be coresearchers and what we hoped to gain to facilitate “informed agreement” (Heron, 1996, p. 63), conscious engagement, and group ownership of the study. Intentions shared at the onset of the inquiry ranged from intrapersonal (e.g., wanting to grow and heal), to social (e.g., yearning to engage in community or gain a certain quality of friendships), curiosity (e.g., wishing to understand transformation and integration better), and altruism (e.g., desiring to make a positive contribution to collective knowledge or wellbeing of others).

**Distinguishing Action and Reflection Given a Transpersonal Inquiry.** Our study (Ross, 2008, 2017) involved exploring deeply a phenomenon of our “intrapyschic life” and “interpersonal relations” (Heron, 1996, p. 37), as opposed to inquiring about how to do or become something. We quickly discovered that the line of distinction between action and reflection is in actuality blurred. Before collecting data, we needed to clarify, based on our context, how we would define each task.

Authors of CI, transformative learning theory, and the related method called *heuristic inquiry* all acknowledge that reflection can be a form of action (Bray et al., 2000; Mezirow, 1991; Moustakas, 1990) or the two can be intertwined as “reflection in action” (Bray et al., 2000, p. 9). For this study (Ross, 2008, 2017), the action was defined in traditional terms as a concrete activity such as

initiating a conversation. In order to examine a transpersonal phenomenon, we found that action, as data collection and analysis activity, must also include an act of intentional volition where the coresearchers intend to respond to the research question by attending to internal sensations, feelings, relationships, spirit (however defined) and external experiences. A deeper action is to attend to the synchronicities between internal and external circumstances as if they directly inform the inquiry question. The assumption of this definition of action presumes that internal and external events are interrelated and are metaphorically, psychologically, and spiritually related to the research question.

As an activity of data collection, action is fortified when the coresearcher makes a clear and focused intention to assume that one's inner sensations, feelings, thoughts and external events, activities, and experiences are directly connected and mutually informative of the research question. In other words, the coresearcher upholds the possibility that moment-to-moment experiences, both internally and externally, have the potential to inform the research intent.

Existing literature confirms that action involves "paying heed moment by moment" (Heron, 1996, p. 17) and by having "imaginal openness" and "empathic communion" (p. 119) in relationship to the present moment and conscious use of all senses to perceive our "ever changing empathic and unrestricted perceptual transactions with the world" (p. 117). For example, under typical circumstances, the prompt "What is my experience of the feminine?" might be a request for reflection. In the context of our inquiry topic, this prompt became, in essence, an action because the source of data derives from intentional effort of attentive contemplation with all senses and gathering information external to the self and from within. The action cycle of data collection requires mindfulness to the inquiry with deliberate, committed self-reflexivity of paying "extraordinary heed" (p. 117). During this research phase in Ross (2008, 2017), activities during daily living such as a discussion with friends became action through which the coresearcher could connect to information (sourced in felt visceral experiences, feelings, premonitions, tacit knowing,

dreams, conversations, and synchronicities) in order to respond to the agreed upon action prompt.

*Reflection* in a CI is central to data collection and includes looking backwards in time to critically analyze assumptions, actions, attitudes, values (Mezirow, 1991) and reflective interpretations intended to correct cognitive distortions (Cell, 1984). In Ross (2008, 2017), our CG defined reflection as an endeavor that helps the CG to scrutinize past experiences for the purpose of making unconscious experiences conscious and causing coresearchers to learn, grow and heal and as such, constitutes a group heuristic activity.

In Ross (2008, 2017), in order to add dimensionality to the data that was collected, the group carried out at least one or more reflection types (descriptive, evaluative, and/or explanative) during each group meeting. According to Heron (1996), *descriptive reflection* occurs when we aim to decipher and filter phenomenological content when we share and listen. *Evaluative reflection* involves judging whether our or others' "subjectivity is uncritical, unfocused and unrefined" (p. 143). Lastly, *explanatory reflection* involves deliberate making meaning.

#### ***Data Generation Via Action and Reflection Cycles***

In total, in Ross (2008, 2017), we met as an inquiry group for 19 group meetings averaging about 3.5 hours each, a three-day retreat<sup>1</sup>, all of which transpired across a period of 13 months. As a group, we determined the content of all action cycles before the end of all meetings. Heron (1996) explained that although balancing action and reflection is fundamental "there is no general formula" except for inquirers to discuss the balance occasionally to ensure that the cycles are not overly experiential or abstract (p. 141).

The basic content of our meetings (Ross, 2008, 2017) and the reflection, actions, and analysis we endeavored, is exhibited in Table 1 as they occurred chronologically by month and year. In actuality the group meetings involved both action and reflection (Heron, 1996). For example, after a few hours of reflection, a coresearcher might suggest that we engage in an action such as walks in nature, drawing, or a meditation to access more information in order to enrich and contrast the



**Table 1. Chronology and content of the group meetings and actions taken by month and year.**

Meeting / Month	Year	Basic Content
Month 1–4	2006	<p><b>Meeting:</b> First research meeting consisted of all participants who agreed to the conditions and criteria of the research. We met twice total in this first month.</p> <p><b>Action:</b> Ponder and document my response to the inquiries: “How do I feel?”, “What is happening right now in my life and what might that mean in the context of this research question?”, and “Am I integrating and if so, in what ways?”</p> <p><b>Meetings:</b> Continued to conduct research meetings twice per month (every other week), for an average of 3.5 hours each.</p> <p><b>Action:</b> Inquire within and document my response to the question: “What is the relationship between integration and suppression?”.</p> <p><b>Action:</b> Entertain and document my response to the inquiries about the masculine and feminine: “What is the feminine?”, “What are examples of the feminine in my life?”, “What does the feminine feel like in my body?”, “How does the feminine show up in my life?”, “How did I experience and respond to masculine and feminine people and places while abroad?”, and “How do my experiences of the masculine and the feminine while abroad affect me now that I am have returned from travel?”.</p>
Month 5	2006	<p><b>Meeting:</b> Conducted 1 research meeting due to low attendance (3 people were present) during the other meeting.</p> <p><b>Action:</b> Complete a chronological integration timeline of experiences, feelings, thoughts, significant events, and personal themes to span pre-travel through to the present day. (This activity was completed by 3 of the 7 coresearchers during these months but then as a group we abandoned this action activity until we chose to initiate the activity again in month 10. See months 8-11.)</p>
Month 6	2006	<p><b>Meeting:</b> Conducted 1 research meeting due to the winter holidays.</p> <p><b>Action:</b> Sit and meditate every Wednesday and Sunday night for approximately 15 minutes with the intention of gathering together nonlocally and to use non-ordinary ways of knowing to answer our research question.</p>
Month 7	2007	<p><b>Meeting:</b> Created and participated in a 2.5-day residential research retreat designed to deepen our reflection and to begin meaning-making and making meaning.</p> <p><b>Action:</b> Experience the action-oriented rituals, exercises, and ceremonies with the Dagara initiated shaman.</p> <p><b>Action:</b> Note my feelings and responses to our experiences of the retreat.</p>
Month 8–11	2007	<p><b>Meeting:</b> Conducted 1 research meeting per month. These meetings included meaning-making, data analysis, and thematic emergence. Member checks conducted.</p> <p><b>Action:</b> Entertain and document my response to the inquiries: “How do I feel?”, “What is happening right now in my life and what might that mean in the context of this research question?”, and “Am I integrating and if so, in what ways?”.</p> <p><b>Action:</b> Complete the previously abandoned activity of a chronological integration timeline of experiences, feelings, thoughts, significant events, and personal themes to span pre-travel through to the present day. (All coresearchers completed the integration timeline activity.)</p>
Month 12	2007	<p><b>Meeting:</b> Conducted 2 research meetings. These meetings included further analysis, meaning-making, validity measures, and thematic refinement. Member checks conducted.</p> <p><b>Action:</b> Respond to the validity measures questions sent out by the initiating researcher.</p>
Month 13	2007	<p><b>Meeting:</b> Concluded the research during a small retreat and closing ceremony. Conducted validity measures. Member checks conducted.</p> <p><b>Action:</b> Write your “integration story;” and/or bring special objects, stories, and closing thoughts for the ceremony; and/or devise a ritual that will facilitate a feeling of completion for you.</p>

discoveries that emerged during reflective discourse. This mini-round of reflection-action-reflection also fostered continuous grounding of the knowledge into lived experience and mitigated any tendencies for abstraction.

### **Emergent Data Types and Data Generation**

**Activities.** In CI research, coresearchers codetermine activities that will generate relevant dynamic lived experiences through which data emerge. Data generation and analysis can occur throughout the research and thus the two are not distinct procedures. Furthermore, data gathering and data analysis can also use the same strategies toward their respective ends: producing data and producing outcomes.

The primary data in a CI is lived experience which is embodied and tacit; not yet made into form through expression (Heron, 1996). Through the course of our study (Ross, 2008, 2017), the CG selected to gather primary data using storytelling, drawing, meditation, walks in nature, discourse, three types of reflection, ceremony with a spiritual leader, esoteric cards, ritual, and sharing our dreams. In order to practice the full range of attentiveness, I provided the CG a reference page describing each type of reflection.

Secondary data is information retrospective of the lived experience (Heron, 1996) and is categorized as *presentational illustrations* and/or narratives (Bray et al., 2000). In Ross (2008, 2017), presentational illustrations captured experiential, nonlinear, nonverbal data through images and experiences that we later translated into propositional knowledge through critical discourse. These took the form of expressive art (music, movement, drawing, ritual, experiential exercises, etc.) or schematics (conceptual drawings or concept maps) that we documented by photographing. Narratives constitute written documentation of coresearchers' thoughts and feelings, some of which might have been spoken communications. We captured this data in various ways, including journals, meeting notes, transcribed audiotaped dialogue, and online dialogue entries and a sizable homework project we called "My Integration Timeline" (a month-by-month, detailed account of the events, feelings, and themes experienced prior to transformative travel to present) that each coresearcher completed.

### **Validity Measures During Data Collection.**

The idea of validity in research originates in a positivist paradigm, meaning that it stems from an ontology asserting that there is an absolute truth we can know and that the pursuit of objectivity is central. Validity in a participatory paradigm might involve discourse that asks, "Are we in any way deceiving ourselves in our claims and in our practice?" (Reason, 1988, p. 37). This research (Ross, 2008, 2017) implemented nine validity measures originating from Heron (1996), Heron and Reason (2002), Merriam (2002), and other authors (Paxton, 2002; Rosenthal, 2005; Sartor, 1998; Van Stralen-Cooper, 2003) who have completed CI research. Most of the nine measures are specific to CI design and pertain to explicit ways in which the CG can conduct themselves and make choices in ways that improve the strength of the results.

The CG (Ross, 2008, 2017) integrated the following six validity measures into the design and process:

1. Paying attention to the number of inquiry cycles so they are enough to confidently answer the question;
2. Balancing action and reflection (and reflecting about the process);
3. Using both *divergent focus* (subgroups or individuals working on differing topics concurrently) and *convergent focus* (the entire group working on the same topic);
4. Implementing descriptive, evaluative, explanation, and application/practical reflection types;
5. Establishing criteria and processes that define group effectiveness; and
6. Balancing chaos and order.

The remaining three validity measures are discussed within the context of the formal data analysis. Implementing a CI requires continuous analysis and evaluation as coresearchers generate data, in order to ground the data in lived experience, determine adherence to validity measures, monitor pacing, and determine goal achievement. Still, at some point, formal data analysis is necessary. Formal data analysis involves repeatedly examining and scrutinizing all data from many perspectives and differ-

ent configurations; key here is attempting to glean meaning and gain reflective aspects of the essence of the phenomenon by virtue of having intimately, scrupulously, and collaboratively examined lived experiences of it.

This part of the process began for our research (Ross, 2008, 2017) during the seventh month of the project. Our CG decided that to best launch formal data analysis, we wanted to become immersed in the data for an extended period. We deduced that not even a day-long meeting would be sufficient time for us to become immersed deeply enough to make substantial and meaningful progress. We cocreated a residential retreat where we ate, slept, and worked at a coresearchers vacation home secluded in nature for two and a half days. During the retreat we grounded and referenced prior experiences by generating presentational knowledge through creative expression and conceptual knowledge through propositional processes of cognitive analysis and synthesis (Heron, 1996). Upon the retreat's end, the data comprised (a) the large meaning-making schemas (i.e., presentational knowledge via drawings, symbols, and diagrams) produced from the retreat, (b) the transcribed group meetings, and (c) our research journal narratives.

For a period of four months, we completed hermeneutic cycles of analysis wherein, due to the fact that our study was also my dissertation (Ross, 2008), I served as a feedback loop to our group analysis. Meaning, I further analyzed and synthesized our findings at home, and then brought the results back to the CG for scrutiny and refinement. During these cycles, I would first share my procedures and then

the findings. The group checked the resulting themes against our collective experiences in order to ground and confirm the outcomes in experiential knowing. We refined the themes through validation measures such as *gaining multiple perspectives on mutual experiences, grounding themes in lived experiences, imaginative variation, challenging uncritical subjectivity and uncritical group intersubjectivity, and playing devil's advocate* (see Heron, 1996). We also evaluated the proposed research outcomes in embodied ways such as intentionally sitting in silence while viewing the themes, while tending to bodily sensations and *tacit knowing* that founds and precedes intuition (Moustakas, 1990). During group analysis, we thoroughly examined all emergent outcomes and edited, refined, and deleted material until we reached consensus (Bray et al., 2000; Heron, 1996; Sartor, 1998). With each iteration, I then incorporated the suppositions from the group and returned to the data for further refinement.

In Ross (2008, 2017), by the fifth month of data analysis (month 12 of the research process), the data themes and a pattern of experience were reasonably refined, so as suggested by Reason (1994a), we implemented the validity procedures discussed in the section below. Table 2 shows an overview of the data analysis and validity measures by month.

The effectiveness of validity procedures in this context refers to the degree that the research answers the inquiry question and the soundness of the methodological procedures and the practices employed. Below I review the ways in which our CG (Ross, 2008, 2017) implemented the following three

**Table 2. Chronology of data analysis and validity measures by month.**

Meeting(s)	Major Activities of Analysis and Validation
<b>Month 7</b>	3-day retreat. Review of journals, ceremonial ritual, self-analysis, projection of journal content to visual schematics, meaning making, making sense of data.
<b>Month 8-11</b>	Conducted 1 research meeting per month. These meetings included meaning-making, data analysis, and thematic emergence. Member checks conducted.
<b>Month 12</b>	Conducted 2 research meetings. These meetings included further analysis, meaning-making, validity measures, and thematic refinement. Member checks conducted.
<b>Month 13</b>	Concluded the research during a small retreat and closing ceremony. Conducted validity measures. Member checks conducted.

measures: (a) challenging uncritical subjectivity and uncritical group intersubjectivity; (b) triangulating perspectives by gaining multiple viewpoints on experiences among researchers throughout data collection and data analysis (i.e., *member checks*); and (c) seeking the degree of usefulness reported by others.

**Validity Measure: Challenging Uncritical Subjectivity and Uncritical Group Intersubjectivity.** A CI involves ongoing efforts to produce trustworthy outcomes by questioning the psychological and ontological sources of thoughts, intent that precedes verbalizations, and underlying assumptions about ideas, both for one's self and others. This inquiry group (Ross, 2008, 2017) applied, to the best of our ability, suggestions that each CI group take concerted time to make consensual decisions regarding the inquiry soundness (Heron, 1996; Reason, 1994b; Rowan, 1981, 2001) to include decisions about owning group leadership (i.e., collective leadership, group ownership of ideas); committing to facilitation of group dynamics; challenging uncritical subjectivity (i.e., honest questioning, falsification; Heron, 1988); confronting internal barriers to authentic collaboration (i.e., internal defensiveness; Heron, 1988); managing unaware projections; and sustaining authentic collaboration.

We reported the ways in which we felt we met and did not meet these measures of validity (Ross, 2008, 2017). For example, as individuals and groups, we can become emotionally attached to ideas, get enmeshed in a projection of reality, or even falsify information. Techniques we took to stave uncritical inter/subjectivity included being open to the potential for ideas to which one is initially resistant and playing devil's advocate, seeking out doubts both individually and formally as a group (Heron, 1996). Additionally, we developed capacities of critical inter/subjectivity by asking questions that reveal underlying assumptions, that invite exploration from different perspectives or address contextual conditions, each of which might create openings and provoke more questions.

**Member Checks.** Another way to address validity is by implementing member checks. For our CI (Ross, 2008, 2017), I define member checks as activities conducted simultaneously by two or more

coresearchers, who maintain ongoing conferring consultation in order to come to conclusions that best reflect the voices and all diverse experiences of all the coresearchers. During data generation, coresearchers conduct ongoing and fully participatory analysis where the group scrutinizes, revises, edits, changes, and challenges one another and the data in order to continuously ground all presentational and propositional outcomes in lived experience. This means for example, asking one another and one's self, "What is an example of that?" or "When/how did this happen to you?" A strength of CI is that data is analyzed not only continuously by a group through critical dialogue and reflection together, but also as an activity that asks individuals to view information from multiple perspectives. For our research, we completed member checks of this rigor throughout the six month data generation period and during formal data analysis activities.

In an effort to make absolutely sure we were not misinterpreting or misrepresenting the data (Ross, 2008, 2017), I prepared a member check sheet of questions based on validity measures (Heron, 1996), intended to (a) gather reflective responses about the coresearchers' experiences of "the research process" itself, and (b) gain CG analysis of my interpretations of our integration timeline activity content. I wanted to implement a final opportunity to ask a key validity question again, "Have we, in any way, fooled ourselves?" I gave each coresearcher differently colored highlighters, showed them my color-coding system, and asked them to review and edit my analysis for accuracy as a member check. They examined my writing, made corrections, and added data they felt were missing or incomplete. We spent about one hour completing this exercise. After the meeting, I took this written information and used it to further analyze, refine, and alter the identified pattern. A CI is ideally finished "when there is a new congruence between the four kinds of knowing" (Heron & Reason, 1995, p. 128). We felt confident at the end of the meeting that the pattern and meta-theme results demonstrated the data reached saturation and our research endeavor was complete.

**Degree of Usefulness Reported by Others.** We can also measure outcome validity by ascertain-



ing the usefulness of the outcomes to others external to the study (Sartor, 1998). This validity measure became particularly salient when we were nearing the end of the research process in Ross (2008, 2017). In particular, we solicited responses from past study abroad participants who did not choose to be coresearchers, but who were interested in contributing. We showed them the outcomes of the research to a few interested people who showed interest and asked them to respond to the results. One woman happened to be experiencing feelings of depression when we approached her to review the data. She was so elated to have many of her own dark processes revealed to her, that she subsequently spent hours reviewing her study abroad journal and her writings over the past nearly three years since return. She learned about the integration timeline activity that we had created and decided to make one of her own post-travel life experiences. She spent eight hours reading, reflecting, and creating her integration timeline. She even hoped we would invite her into the research. A different study abroad participant shouted after hearing the results, because she was elated to hear the accuracy to which the research gave her terms to communicate her experiences and understanding that normalized her confusing circumstances.

We gained serendipitous feedback about the degree to which our outcomes in Ross (2008, 2017) were congruent and resonant of others' lived experience. One instance that stands out pertains to a friend who is a psychotherapist who happened to be fraught after having had a life-changing close encounter when a whale rose from deep below where she and her husband were swimming and they found themselves only a few feet away from its giant gazing eye. The encounter caused both her and her husband to move to Hawaii, where the event occurred. Oddly, she spent two years struggling emotionally after the move to Hawaii. I felt moved to tell her about the outcomes of our research about integrating transformation (see Ross, 2008, Results section). As I spoke, tears streamed down her face out of sheer validation and witnessing. She explained that after two years of confusion, pain, isolation, struggle, and even professional therapy, she finally felt she had words, structure, and meaning to

describe her intense process. When she heard the pattern, she said that her experiences became real.

A colleague and fellow graduate student read our findings (Ross, 2008) and reported that her previous travel abroad experiences were transformative for her. After reading the findings thoroughly, she reported: "There is nothing that has been written that I have not experienced." She elaborated, saying, "I even tried to examine my own experience in such a way as to question that perhaps, the research had left something out," (personal communication, August 13, 2007) but her search yielded no avail. She submitted that indeed, the findings of this research reflected her lived experience of integrating transformation.

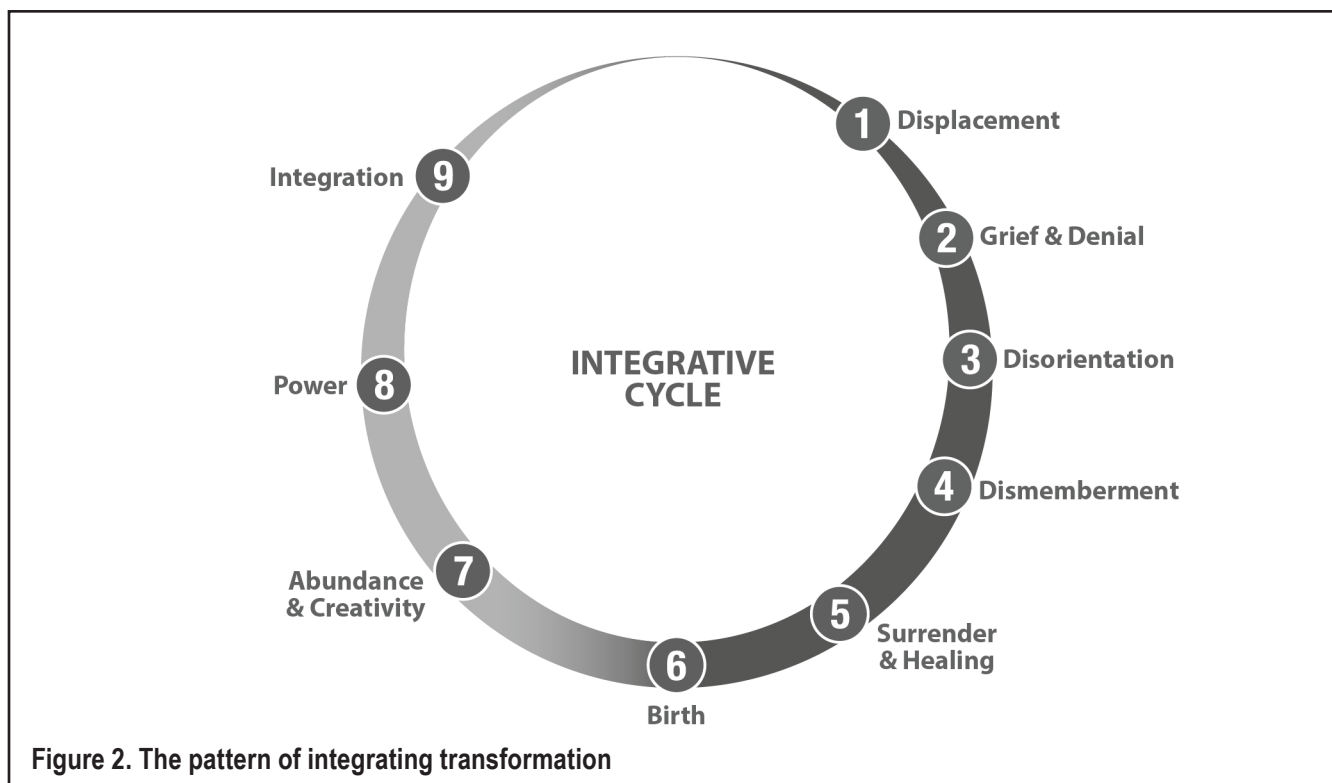
During our final research meeting for Ross (2008, 2017), we confirmed the findings as constituting knowledge grounded in all four aspects of Heron's extended epistemology. A CI is successful when practical, presentational, propositional, and experiential knowledge become grounded in each other (Heron, 1996). We were pleased that the outcomes precisely and concisely reflected our lived experience as individuals and as a group, of integrating transformation post-study abroad.

### **A Focused Discussion of Study Results**

It is outside the scope of this paper to discuss the outcomes of Ross (2008) in detail. Different papers (Ross, 2008, 2017, 2019c) deliver a thorough account of the findings through rich descriptions and quotations, narratives of the process, and implications to theory and practice.

The results in Ross (2008, 2017) indicate that integrating a life-changing, transformative travel experience is possible and reports a process comprised of 10 phases (see Figure 2). The data revealed that the phases may overlap but are not revisited in one cycle of integration, and that the capacities individuals develop along the way are cumulative. One unexpected finding identifies how integration causes transformation to be consummated. Results identify a figure-8 pattern comprised of thirteen phases that combines the transformative cycle (i.e., Campbell's hero's journey) and the phases of integration (Figure 3) to form a complete transformation.





**Figure 2. The pattern of integrating transformation**

The figure-8 shape of a wholly realized transformation illustrates the findings that suggest transformation involves an ascent into a life-changing peak or trauma wherein the individual conceives a potential new self, and a descent into the self through the experiences culminating in death of the outdated self, which account for the integration of transformative experience or transformation integration.

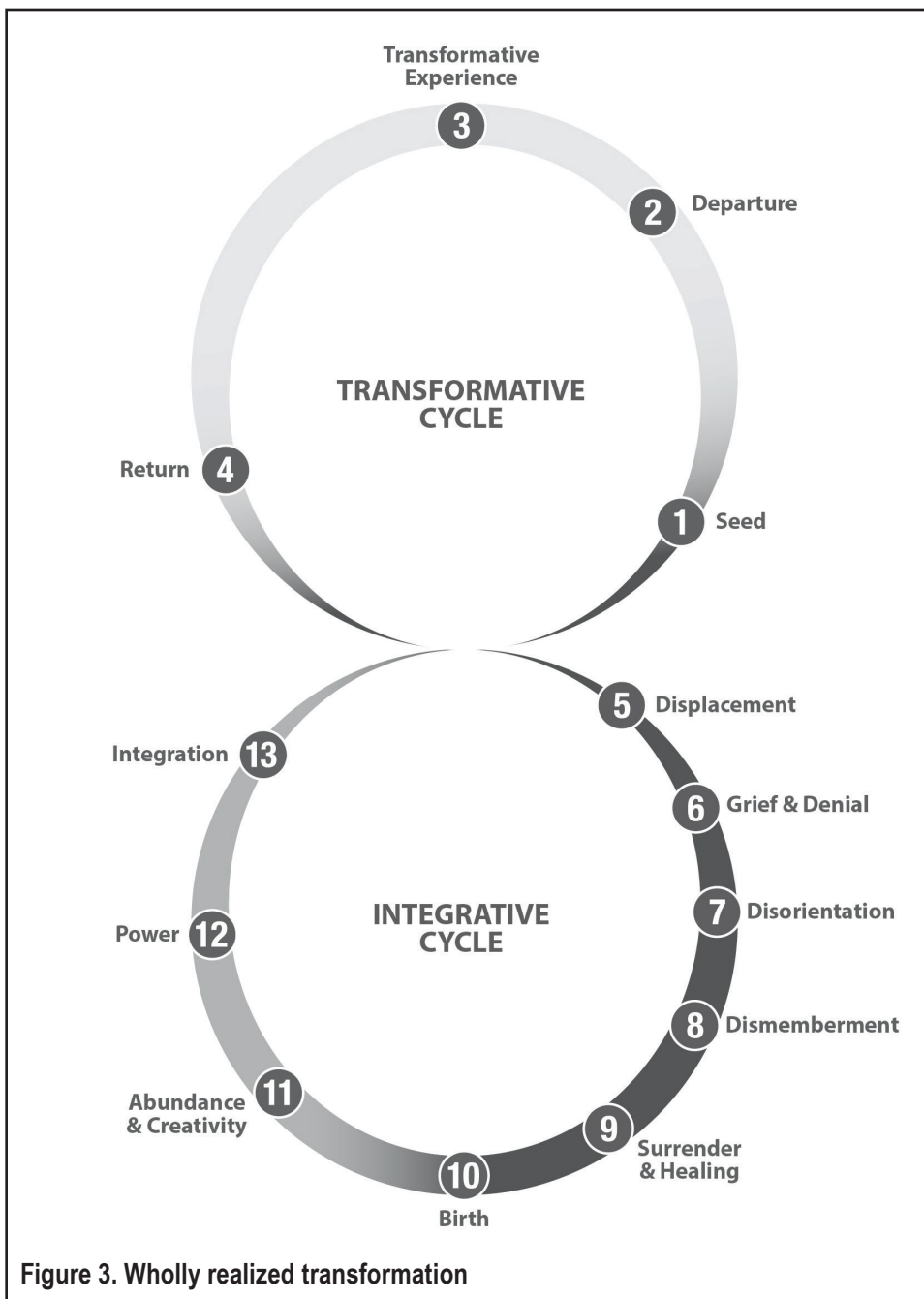
To bring this presentational image to life, I outline key quotations from Ross (2008) that include each member of the CG, and that are indicative of each phase of transformation and integration (Table 3).

The thirteen phases described in Ross (2008, 2017) identify that integrating the catalytic experience requires recognizing, accepting, healing, and integrating shunned or wounded aspects of the self, the deepest of which are aspects of one's inner masculine or feminine. This conceptualization aligns with the Jungian approach to individuation, wholeness, and sacred marriage, hieros gamos (Jung, 1988, p. 533), which are processes of integration that culminate in the union of one's masculine and feminine. Other theories

present aspects of transformation processes (Boyd & Myers, 1988; Fosha & Osiason, 1996; Mezirow, 1978; Wilber, 1980/1996; 1999), but do not make precise distinctions with regard to the movement and interconnection between transformation and integration. The figure-8 finding gives shape, symbol, detail, and movement to Wilber's (1999) conclusion that "What is required . . . is an integration of Ascent and Descent, Eros and Agape, Wisdom and Compassion, Evolution and Involution" (para. 27), and contributes a feminine complement to Campbell's monomyth (1968) that is predominantly masculine and lacks processes to integrate of the psychospiritual peak or boon (Ross, 2019c).

### **Call to Use CI**

This paper is a call to recognize participatory approaches as a methodological, epistemological, democratic, ecological, and spiritual imperative in a postmodern context (Denzin & Lincoln, 2018) because their mere use challenges existing hegemonic social and psychological structures. Participatory methods, and CI in particular, extend our understanding of the scientific process to include research that aims, first and foremost, to transform,



**Figure 3. Wholly realized transformation**

mend, and heal, and secondarily, to produce new knowledge. This radical shift in priority places relationships, which includes the researcher, as the principal mechanism through which information is discovered, while it democratizes scientific processes, and produces knowledge liberated from colonization and prevailing cultural norms that marginalize, harm, and even destroy people.

CI in particular are poised to facilitate advances in both transpersonal theory and

practice because the methods support transpersonal ontologies and epistemologies. Coresearchers can, for example, transparently conduct research that engages transcendent realms as an important or central source of information. Data generation and analysis activities that involve spirituality and multiple ways of knowing such as meditation, mindfulness, ritual, ceremony, prayer and esotericism are celebrated. The research process can be designed and experienced as ceremony or sacred where transcendental realms play vital or in some ontologies, even a participatory role (Wilson, 2008).

One indicator that CI approaches (and similar participatory methods) are gaining wider recognition as a “viable methodology” (Mardis & Everhart, 2013, p. 164) is its use in domains of study that typically rely heavily on positivist approaches. It is promising, for example, that CI research such as that of Ingram and colleagues (2017) was recently published in a top-rated journal of tourism research (representing the largest service sector

industry in the world economy, with approximately 120 scholarly journals; Cursoy & Sandstrom, 2014). Although scholars who are strongly aligned with a participatory paradigm might at first find use of CI within a positivist paradigm problematic if not impossible, I argue that we as scholars exercise the CI strategy of remaining open and curious about perceived differences. Future studies might consider adopting the innovative hybrid strategies of validity and reliability (triangulation in this case) of Ingre

**Table 3. Quotations representative of each phase of a complete transformation (Part 1, Phases 1–10).**

Phase and Title	Participant Quotes
<b>Transformative upper circle – experiences of the ‘hero’s journey’</b>	
<b>1 Seed</b>	"I went to Peru in hopes of letting go of some things I was holding onto that weren't serving me."
<b>2 Departure</b>	"Being able to be free and open, and probably the time that we did spend together so often just sharing, or meditating, or writing in our journals—now that I think about it—is a big part of that [transforming]."
<b>3 Transformative Catalyst</b>	"During that 2 1/2 weeks, I was alive, the most I've ever been. Most definitely. I can feel, just being myself, enjoying nature, and all the people that I met."
<b>4 Return</b>	"I know what happens to me when I return—it's like I don't want to be back, I do not want to return."
<b>Integrative lower circle – experiences post return</b>	
<b>5 Displacement</b>	"That's not who I am. And the person I am in Costa Rica. I like that person, and I feel like I can't be that person here."
<b>6 Denial and Grief</b>	"[My sadness] wasn't even that I was missing my family, I was missing you guys [the travel group]. That was weird to me." "You cannot go back to the person you were before. It's too late. Stuff happened to you whether you know it or not. And you look the same and whether you are tanner, skinnier, or something different but you basically look the same. That's the hard part. People see the same you, but you're not the same. And you're in these same environments and now it becomes more painful than ever."
<b>7 Disorientation</b>	"I kind of fell apart at that point because it was true [I lost my smile upon return from travel]. It does feel like I left a part of me somewhere back in that experience." "[Being back is] dis-settling because....I'm in my old world, my old ways of being and doing are all around and...then what?"
<b>8 Dismemberment</b>	"Funny thing is—is my family still treats me the same, but I feel more independent and so it's really hard on me. I can't just...I can't just push them away because they're still holding on." "If you asked me how I was, I couldn't even really tell you. I had nothing to say, I was blank. I went to Frank [a therapist] and I couldn't say a thing—couldn't speak. I [thought], "I really don't know how I feel." My voice was gone. Everything was gone." I'm leaving everything that I know... right now I'm kind of freaking out because I don't know where I'm going to go... literally tonight. I have to go get my clothes, and I...[am wondering]. "Where am I gonna go?"
<b>9 Surrender and Healing</b>	"I was stuck and numb and I had this grief but I couldn't even explain why it was there. I was in this hole, in this dark place and then after I realized, not what was causing it, but kind of what was causing it—where I was stuck—and got out of it." "I haven't been pushing them away [feelings], I've been feeling it [pain] and whenever something reminds me of it [childhood abuse]—I just go with it and experience it and talk about it or write about it—whatever I have to do to get it out. But it's weird because even with all that pain that's there... I've still haven't been this happy before which is really weird because... I'm... happy that I'm actually dealing with it."
<b>10 Birth</b>	"[I feel] the birthing of something that happened in Costa Rica [or Peru]," or "the person that was born there, has now finally come out." "You are starting to practice that [speaking your creative analysis while at work every day because the external [work environment] is kind of forcing it, and so you're starting to practice speaking your ideas, the knowledge that's inside of you that you used to assume that everybody [already] knew."

**Table 3. Quotations representative of each phase of a complete transformation (Part 2, Phases 11–13).**

Phase and Title	Participant Quotes
<b>11 Abundance and Creativity</b>	"I feel good about myself, it's really weird, I feel good about myself and strong." "It was like—I was arriving." One woman described herself as feeling like a "creative portal," not sure "how this was all happening." "While I wish I didn't have to do this [effort towards the creative action], I know I must," or "I know I cannot do this any differently. I must move forward."
<b>12 Power</b>	"I don't talk to any of my old [less-healthy] friends... they're gone." "I am finally capable and confident to face the [work] team on my own. I can even train people on my own now." "I feel like I don't have to overextend myself to prove my worth and capacities. I feel supported for the first time in over nine years. I feel a sense of worthiness and deeper confidence... like I have grown up in some sort of way. Before this whole process began there was a child inside with unmet needs and now that same child feels grown... a bit unsteady still... but definitely grown."
<b>13 Integration</b>	"Now, I like to be alone. I am 'ok' with being alone—I can actually be alone. I realize now that I can always go find people." "It was the first time in my life where everything was aligned at the same time. I knew it was rare. I wanted to savor it while it lasted."

and colleagues (2017) by translating salient aspects of positivist procedures and mobilizing them into a participatory context.

In an era of information surplus, there is a strong need for guiding wisdom or precious knowledge. I argue that one way to access sapience—understanding that elucidates previously enigmatic phenomenon—is by entering into spiritual and deeply embodied realms of CI. It is especially time that we—those who uphold an interrelated and spiritual ontology—heed the words of Patricia Maguire (2002), champion of participatory action research, who implored researchers who have new-found knowledge about CI to “move forward to risk a co-operative inquiry endeavor” (p. 269). Not all CIs will produce precious knowledge. And, I argue, if we dare to enter into the mystery and unknown together, in a process that engages spiritual realms and transpersonal ways of knowing, we may increase our odds.

The opening is now to participate in the centrality of a collaborative and extended epistemology that is reminiscent of and brings us full circle to the ways of old. If we dare to gather together in a circle, as our ancestors did, with the explicit intent of holistically responding to questions

vital to the advancement of our communities and ourselves, we create the opportunity to become “a vessel for the discovery of what may be unspeakable . . . or for bridging separations . . . birthing . . . never before thought of ideas” (Coghlan & Abraham, 2017, p. 126). It is time once again to gather in a community’s circle and create the opportunity for collective wisdom to emerge. By engaging in collaborative inquiry together—by questioning, sharing, reflecting, learning, being vulnerable, and engaging the transcendent—we create conditions conducive for precious knowledge to emerge and for individuals, communities, and ourselves to transform.

#### Notes

1. The coresearcher group planned and organized the retreat together. The costs for the retreat and all coresearcher gatherings were democratically shared.

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