An Exploration of The Nature and Impact of Co-Active Leadership

Understanding Co-Active Leadership

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By

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Abstract

Organisational systems are being viewed as fluid, non-linear and complex, characterised by organic, emergent and continuous change (i.e. Marshak & Grant, 2008). This is reflected in many research areas including, leadership theory, educational leadership, teaching and facilitation with a trend towards shared leadership. Yet as a discipline, leadership development has tended to limit itself to the development of leaders in ways that remain linear and hierarchical (Day, 2000; Fletcher & Käufer, 2003). This study shows how these fields integrate and explores a shared leadership approach to leadership development.

As a practical example of leadership sharing within a developmental context, the Coaches Training Institute has utilised two facilitators to concurrently deliver all workshop-based training for over 25 years. Working as Faculty for CTI's Coach training program, this became the context of study where I sought to understand Co-Active Leadership as a positive model of leadership sharing. Whilst anecdotal and personal experience speaks to the power of this approach, this study sought to provide a deeper understanding to support greater leadership sharing in other environments.

To understand how Co-Active Leadership created this success I employed a phenomenological approach to explore the lived experience of each group of people involved in the Coach Training Workshops. Specifically, 18 workshop participants, six assistants and four leaders were interviewed to provide a rich data set to explore: How Co Active Leadership was described? What impact it has? And, how can this form of leadership be developed? Each of these questions aligned with and provided a foundation for Insider Action Research which integrated and applied this learning to support organisational change and the application of Co-Active Leadership beyond CTI.

Analysis of interview data contributed key insights to understand the impact of Co-Active Leadership when it was working, and when it was not. When it was working, both leaders brought authenticity and humility in their willingness to express concurrent and bidirectional leadership in a dynamic and co-creative manner. In doing so, participants saw them as merging into a single leadership entity which created an impact described as smooth and flowing. Multiple levels of analysis were identified as important in effective leadership sharing. When it was not working, the single leadership entity dissolved into two separate leaders. This increased the complexity of who to follow, resulting in a cognitively and emotionally exhausting experience. This contrast demonstrated the volatility of leadership sharing and identified three key triggers which inhibit its success.

Action cycles began with unsuccessful attempts to enrol others to be more Co-Active in their leadership. These efforts reinforced the importance of being able to describe Co-Active leadership and its impact, while also providing a foundation of learning for later successes. Ultimately, a blended model of leadership sharing was successfully integrated into a new organisational context. This approach integrated both rotational and concurrent forms of leadership enactment to support the momentary expression of leadership, and the ongoing development of both leaders and leadership. Overall, this has resulted in the identification of both disciplinary and actionable knowledge regarding shared leadership.

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Chapter 1: Introduction

1.1 General Introduction to the Dissertation

I work as a leadership coach and psychologist have been able to affiliate with a number of international consulting firms. These affiliations have increased my exposure to the leadership development consulting industry and broadened my ability to impact clients. It is within this context that this research project was conducted.

As a theme, the organisations I have partnered with have tended to progress in line with emergent theories of both leadership and leadership development that reflect the individual, relational and systems components of leading organisations within what is being referred to as a VUCA world (i.e. Bennett and Lemoine, 2014; Petrie, 2014). These companies view the development of leadership as a journey that enhances a leader's ability to attend and respond to the increasing volatility, uncertainty, complexity and ambiguity (VUCA) of modern global, business environments. In part, this development reflects an individual journey, building self-awareness and helping people to better lead and manage themselves in the face of complexity. It also reflects a transition from hierarchical, command and control styles of leadership towards more inclusive, relational and systems level leadership allowing teams to better capitalise on the unique strengths of individual members, while simultaneously supporting wider organisational transformation (i.e. Ackerman-Anderson, 2015; Marshak and Grant, 2008).

As a project, this research emerged out of a subjective awareness that one of my roles (with The Coaches Training Institute, CTI) utilised a form of shared-leadership which I felt reflected the form of individual, relational and systems level awareness that other companies were teaching. What I saw was that while this form of leadership appeared to be exemplary of the content of many programmes, it was not a style of facilitation (or leadership) adopted

by other companies to deliver these programmes. Intuitively, this led to a great curiosity around the form of leadership utilised by CTI, and specifically the benefits of bringing it to life in other contexts (i.e. companies), and how to do so.

From this reflection on the research context, the following overarching research question was identified:

- How can one apply Co-Active Leadership approaches in other organisations and contexts?

In order to consider the application of Co-Active Leadership in other contexts, two sub questions emerged:

1. What is Co-Active Leadership and how does one describe it?

2. What is the impact of Co-Active Leadership?

In addition to this level of the research, there was a more personal layer that provided additional context for the action research. Since having participated in the CTI classes in 2008, the development of leaders to be able to lead in this 'Co-Active' manner was something that I had both been curious about, and actively pursued, having explored models of shared leadership and leaderful teams as part of this DBA (i.e. Pearce and Conger, 2003; Raelin, 2003). This academic curiosity further increased as I was selected and employed as a Front of the Room Leader for CTI, teaching these same classes as a Co-leader. Personally, I found that co-leading the workshop was often easier and more impactful (for participants and myself) than leading similar programmes alone, a view that was anecdotally supported by my co-leaders.

More practically, as a relatively new co-leader I found myself working with leaders of less experience than myself (five or less leads in total). While experienced as a facilitator and

trainer, I was relatively new in this co-leading context (with two years' experience and having led approximately 20 workshops in this style at the start of this research). This led me to seek, not only to understand how to bring this form of leadership to other organisations, but now I also had a situational impetus to develop my own skill as a Co-Active Leader, to enhance my ability to effectively support the growth and development of my colleagues

From this situational problematisation, an additional sub-question was identified, specifically:

3. How can one develop their ability as a Co-Active Leader?

In defining the situation in this manner, it became clear that it was influenced by diverse fields of the literature. Namely:

- Leader and Leadership Development as this is the field that myself and the associated companies were working in,

- Forms of leadership characterised by the interaction of multiple (especially two) leaders as related to the form of leadership used by CTI,

- Teaching/facilitation as this is the format within which leadership development is occurring, with a particular focus upon multiple teachers/facilitators

The following sections provide an overview of the research approach to contextualise the project. This is followed by an overview of the literature in these areas to better contextualise this problem, and to expand upon some of the concepts overviewed above. This section provides a broad review of the literature in order to set the scene for the research. The literature is returned to in the Discussion chapter as the emergent results are connected back to the extant research.

After this situating this research in relation to the literature, a brief summary will be provided to further clarify the organisational context for this project.

1.2 Research Overview

In considering this research, I identified two key methodological approaches. Phenomenology was used to explore the lived experience of those who had been exposed to Co-Active Leadership. This data was qualitatively analysed and provided insights into how Co-Active Leadership was described, its impact, and preliminary steps to support co-leader development. Initial plans called for the collected data to be analysed in collaboration with my CTI Dubai co-leaders to provide a rich insider exploration. Due to other commitments, their involvement was not possible in this phase, though did emerge during the action research.

Action Research was used in two phases to provide cycles of action, reflection and research. The first of these phases occurred in parallel to the phenomenological data collection and analysis, allowing a deliberate focus upon my growth and experience as a Co-Active Leader. During the research period I completed approximately 40 workshop co-leads, each of which provided a fertile space for intentional reflection to support my development as a co-active leader.

The second phase followed the qualitative data analysis and allowed me to integrate the learning from the phenomenological exploration into my practical environments. Throughout this phase, I was able to include additional colleagues as co-researchers as we sought to practically apply the insights to develop a co-active style of leadership in new organisational settings.

As explored further in the Methodology Chapter, this research began with large plans which needed to evolve as the study progressed. Two key adjustments emerged as the research continued, namely the initial plans to include a video analysis of co-active leadership was omitted due to the richness of interview data. The other adjustment involved the initially

planned action research cycles included regional co-leaders not being available to explore the emergent data as initially envisaged, though some of these colleagues were able to participate in later attempts to apply co-active styles of leadership in other organisational settings.

1.3 Theoretical Landscape

1.3.1 A Broad View of Leadership Theory & Leadership Development

The organisational environment has changed significantly over the last few years. Gone are the days of predictability and stability where change happens over the space of generations. Described as being increasingly volatile, uncertain, complex and ambiguous (VUCA), these environments are calling for new ways for leaders and businesses to operate. In general, this transition is a move away from the classic, positivistic approaches where change was defined as an exception, often sandwiched between phases of 'unfreeze' and 'refreeze' (Chia, 1995; Marshak and Grant, 2008; Weick and Quinn, 1999). Perspectives are shifting from organisational systems being inherently stable and static, to more fluid, non-linear views where change is organic, emergent and continuous (Chia, 1995; Marshak and Grant, 2008; Tsoukas and Chia, 2002; Van de Ven and Poole, 1995; Weick and Quinn, 1999).

Marshak and Grant (2008) describe this transition in the field Organisational Development as being influenced by post-modern philosophy with a view that 'truth' is emergent from the situation where reality is socially constructed and negotiated between parties. Change from within this perspective requires a shift in mindsets or social agreements and is something that is continuous and often self-organising (Ackerman-Anderson, 2015; Anderson, 1999; Chia, 1995; Kennedy et al., 2013; Marshak and Grant, 2008; Martin and Ernst, 2005).

Unsurprisingly, this shift has been paralleled in many other research areas. Specifically related to this study, a similar shift has been occurring in leadership theory, leadership development, and educational settings.

1.3.2 Leadership Theory

As our understanding and view of organisations have evolved, so too have our views of Leadership (Atwater et al., 2014; Avolio et al., 2009; Dinh et al., 2014; Dionne et al., 2014; Gardner et al., 2010; Lord et al., 2017; Lowe and Gardner, 2001; Pearce and Conger, 2003). The history of leadership theory began with the exploration of individual characteristics and traits of 'heroic' leaders, who were often male and working in large, US based private-sector organisations (i.e. Avolio et al., 2009; Bass and Bass, 2008; Greenwood, 1993). Lord et al. (2017) describe the transition from these beginnings as having occurred in three waves. Moving from the focus of individual traits, leadership research moved to explore behaviours and their subsequent effects on followers. This set the scene for more integrated views including gender, social cognitive, contingency and early transformational leadership theories. The progression of these waves reflect increasing levels of sophistication as the view moved from individual personality traits to the third wave which includes "multi-level models and meta-analyses on teams, shared leadership, leader-member exchange, gender, ethical, abusive, charismatic, and transformational leadership" (Lord et al., 2017, p. 434). In this sense, leadership has evolved from a predictable, cause and effect type construct based upon individual characteristics to a multi-faceted concept, emergent form, and often constructed through, complex leader-follower interactions in response to specific situational needs which can be shared, distributed or substituted across multiple levels including teams, organisations and communities (i.e. Avolio et al., 2009; Dust and Ziegert, 2015; Lord et al., 2017; Pearce and Conger, 2003; Uhl-Bien, 2006; Uhl-Bien et al., 2007; Uhl-Bien et al., 2014; Yammarino et al., 2012).

From residing within 'heroic' individuals who were different from others, Leadership is emerging into a multi-faceted construct encompassing and transcending multiple levels, roles and people (Avolio et al., 2009; DeChurch et al., 2010; Hernandez et al.; Kozlowski and Chao, 2012; Pearce and Conger, 2003; Shamir, 2015; Yammarino et al., 2012). It reflects the complex multi-directional interactions inherent in modern life and can no longer be controlled, or enacted by a single, 'all-knowing' individual. More than this, views of leadership are expanding to include dynamic and contextual qualities (DeRue and Workman, 2012; Drescher et al., 2014; Lord et al., 2016; Oc, 2018) and its ability to enable others to lead, to develop leadership (Uhl-Bien and Arena, 2018). This reflects a move towards greater sharing of leadership, both formally and informally (Pearce and Conger, 2003; Shamir, 2015; Yammarino et al., 2012).

1.3.3 Shared Leadership

The sharing of leadership has been around for a long time, though research in this area has had an historically slow start. Over 2,500 years ago, Co-Leadership was used by Co-Consuls ruling Republican Rome (Sally, 2002), more recently in the early 19th and 20th Centuries, the sharing of leadership was implemented by Joseph Smith into what has become the Mormon Church and Mary Parker Follett wrote of the concept in the early 1900's as she reflected upon her work in organisations and what she saw around her (Bathurst and Monin, 2010; Mendenhall and Marsh, 2010). In 1954, Gibb (cited in Day et al., 2004, p. 873) defined leadership saying that:

> "Leadership is probably best conceived as a group quality, as a set of functions which must be carried out by the group. This concept of 'distributed leadership' is an important one. If there are leadership functions which must be performed in any group, and if these functions may be 'focused' or 'distributed', then leaders will be

identifiable both in terms of the frequency and in terms of the

multiplicity or pattern of functions performed".

It wasn't until the late 1990's, however, (i.e. Avolio et al, 1996; cited in D'Innocenzo et al.,

2014; Heenan and Bennis, 1999) that interest in shared leadership began to rise, in spite of

the dominance of heroic models of leadership (i.e. transformational leadership: Gardner et al.,

2010; Lowe and Gardner, 2001). This rise, however, continued slowly with interest in the

topic, though there was no widespread uptake as the dominant heroic model of leadership

continued to be the primary view of leadership (Fletcher, 2004; Fletcher and Käufer, 2003;

O'Toole et al., 2002). From an academic perspective, Gardner et al. (2010, p. 935) reviewed

the research articles published in the Leadership Quarterly (LQ) from 2000-2009 and of a

total of 682 articles, only 11 studies, a total of 1.5% of all articles published in LQ during the

decade, related to "Participative leadership, shared leadership, delegation and

empowerment". The first of these, not published until 2002. Dinh et al. (2014) extended this

research beyond LQ, finding a total of 41 relevant articles, representing 5% of those

published in the selected journals between 2000 and 2012.

While it remains a small subset of all leadership research, Shared Leadership is a nascent

field still learning to define itself (Avolio et al., 2009; Carson et al., 2007). One of the biggest

challenges with nascent research fields is clarity of nomenclature, and this is no exception

(Contractor et al., 2012; Denis et al., 2012/2015; Sunaguchi, 2015; Ulhøi and Müller, 2014).

The literature discusses a large range of similar concepts, all related, in some way, to

leadership that is not limited to residing within a singular leader. Table 1 outlines a list of

these names, often used interchangeably in the literature (Bolden, 2011; D'Innocenzo et al.,

2014; Ulhøi and Müller, 2014).

Table 1: Overview of the different nomenclature (or forms) of shared leadership in the literature

Shared Cognition	Collaborative Governance
Distributed Leadership	Informal Leadership
Participative Leadership	Emergent Leadership
Relational Leadership	Co-leadership
Participatory Management	Dual Leadership
Concertive Action	Split Management
Collective Leadership	Connective Leadership
Collaborative Leadership	Dispersed Leadership
Shared Leadership	Delegated Leadership
Team Leadership	Peer Leadership

Sources: (Bolden, 2011; D'Innocenzo et al., 2014; Ulhøi and Müller, 2014)

While there is argument to distinguish and define each of these terms (Bolden, 2011; D'Innocenzo et al., 2014; Mayrowetz, 2008), the narrowing down of the broader concept into a concise definition also impacts the way the construct is viewed through that lens (D'Innocenzo et al., 2014). As Pearce (2004, p. 55) suggests:

> "The issue is not vertical leadership or shared leadership. Rather, the issues are: (1) when is leadership most appropriately shared? (2) how does one develop shared leadership? and (3) how does one utilize both vertical and shared leadership to leverage the capabilities of knowledge workers?"

That said, a broad definition of the field provides clarity, especially of how this shared approach to leadership differs from the traditional, hierarchical, heroic nature of leadership common in the research literature and inside organisations. In a review of Distributed Leadership where he considered the diversity of definitions and accounts of this type of leadership, Bolden (2011, p. 252) identified that what was "common across all these accounts is the idea that leadership is not the monopoly of responsibility of just one person, with each suggesting a similar need for more collective and systematic understanding of leadership as a social process".

In one of the most cited definitions of shared leadership (Shamir, 2015), Pearce (2004, p. 48) explains that:

> "shared leadership entails a simultaneous, ongoing, mutual influence process within a team that is characterized by "serial emergence" of official as well as unofficial leaders. In this sense, shared leadership can be considered a manifestation of fully developed empowerment in teams."

To build clarity in this field, researchers have begun to collate and integrate the concepts and to define models of shared leadership (Contractor et al., 2012; Denis et al., 2012/2015; Dust and Ziegert, 2015; Gronn, 2009; Pearce and Manz, 2014; Sergi et al., 2012; Yammarino et al., 2012). With focussed, unitary leadership as well as more distributed forms, Gronn (2000; 2009) has suggested that rather than viewing leadership types as being independent and distinct, or focussed and distributed, in reality, leadership emerges more as a hybrid configuration (of vertical and shared forms) which can be both fluid and emergent.

In seeking to clarify the configurations of multiple leaders, Dust and Ziegert (2015, p. 3) used a two dimensional framework to review the literature on multi-leader teams. These two dimensions reflected the proportion of leaders, and the "dispersion of leadership through role co-enactment" within the team. Proportion of leaders described the concentration (level of focus or distribution) of leadership within the team by identifying how many individuals from within the whole team displayed leadership behaviours. In this, they described the proportion of leaders along three levels: "(1) all; (2) three or more, but fewer than all; and (3) two", (Dust and Ziegert, 2015, p. 4). The second dimension of role co-enactment, referred to the level of independence or overlap of roles for each individual acting as a leader within the team. This dimension had three levels relating to (1) complete, (2) some and (3) no overlap in

roles. Together, these two dimensions formed nine categories of leadership format within multi-leader teams ranging from multiple leaders completely and comprehensively sharing the leadership roles to multiple leaders with independent roles through to dual comprehensive and dual independent leaders.

In this framework, Co-Active Leadership falls within a dual leader format (proportion of the workshop room, including participants) with leadership roles comprehensively shared. In their review of the literature, Dust and Ziegert (2015) identified a total of 5 articles referring to this leadership format, representing 2.9% of included articles reflecting the paucity of organisational research into this format. In this framework, one of the obvious omissions was time as it related to the co-enactment and distribution of leadership within the team.

Including time as a dimension, Contractor et al. (2012) present a structural hybrid view to describe the topology of leadership, ranging from unitary vertical leadership to shared simultaneous leadership where leadership is concurrently enacted by all team members. To describe the space in between these extremes, they pose three key aspects; people, roles and time. People and Time are similar to Dust and Ziegert's (2015) dimensions of proportion and co-enactment, with the addition of roles. Roles relate to distinct leader roles within the team to provide direction and purpose (navigator), create structure and coordination (engineer), maintain healthy relationships (social integrator) and to develop and maintain connections outside of the team (liaison). This is a functional view of leadership sharing looking to describe who is doing what, and when (Morgeson, DeRue and Karam, 2009).

Moving beyond a functional approach, Denis et al. (2012/2015, p. 348), using "the broader label 'leadership in the plural' to encompass the range of (leadership) phenomena", considered "the dominant theoretical and methodological approaches" to identify four streams, or configurations of leadership sharing. These four streams relate to the sharing,

pooling, spreading and producing of leadership. This approach considers the structural and empirical differences of each stream. Sharing leadership is described as the mutual sharing of leadership amongst team members, where "members are leading each other" (p. 350). The pooling of leadership refers to the collation of leadership across dyads, triads or constellations of joint leaders, where this pool of leadership leads a larger group. Spreading leadership relates to the relaying of leadership between people, and across time to achieve the larger outcomes. The final stream holds the relational perspective of leadership articulating that "leadership is an emergent property of relations" (p. 350).

Structurally, the pooling of leadership forms a shared constellation or group of leaders, who are collectively leading others. This is a leadership format that has some history in the corporate environment where organisational leaders form leadership constellations to lead their organisation (Alvarez and Svejenova, 2005; Heenan and Bennis, 1999; O'Toole et al., 2002; Sally, 2002; Svejenova et al., 2010). It is also a format that is relatively common in educational settings with Bolden (2011) identifying that 22% of shared leadership research, and 68% of distributed leadership research has been in the field of education (Table 2). In Education settings, Distributed leadership and co-principalship have both received a lot of research attention (Bolden, 2011; Court, 2004; Denis et al., 2012/2015; Gronn and Hamilton, 2004; Titrek, 2016).

Table 2: Summary of the distribution of research into Shared and Distributed Leadership (Bolden, 2011, pp. 255-256)

Journal Type	Shared Leadership	Distributed Leadership
General Business, Management & Leadership	25%	19%
Health (including Nursing & Medicine)	39%	0%
Education & Education Management	22%	68%
Other (including public administration, general social science, engineering, computing and psychology,	14%	13%

1.3.4 The Evolution of Education and Teaching

This increase of research into shared and distributed forms of leadership in education and teaching parallels disciplines of organisational development and leadership theory (Bacharach et al., 2010; Carpenter II et al., 2007; Friend et al., 2010; Roth and Tobin, 2004; Wenger and Hornyak, 1999). Wenger and Hornyak (1999) describe the importance of this transition as responding to an increase in the complexity expected from learners necessitating a shift from what Freire (2005) referred to as the banking model of education. This 'banking model' reflects the traditional narrative nature of education where educators are seen to be a font of knowledge and learners, the passive recipients of wisdom 'deposits' (Freire, 2005). As can be seen, this is reflective of the 'Heroic' or 'Great Man' theories of leadership where the leader is superior to those following (employees or learners) (i.e. Antonakis and Day, 2018; Bass and Bass, 2008; Fletcher, 2003; Greenwood, 1993; Northouse, 2007).

Expectations of learners increase with the increased complexity of content, topics and organisational environments. With this transition, learning objectives evolve from the imparting of knowledge "through comprehension, application, analysis, synthesis and ultimately, (to) evaluation" (Wenger and Hornyak, 1999, p. 313). Such a transition requires increasingly active roles as students move from passive recipients to become the creators of learning (Conklin, 2013; Easterby-Smith and Olve, 1984). This transition from passive to active is (in part) described in the space of leadership development where classroom-based modalities are being extended to include experiential and action-oriented learning (Day, 2000; Day et al., 2014). Increasing the authority of learner roles also requires a redefinition of the role of teacher or facilitator.

Part of this redefinition of the teacher role reflects the shift towards the more relational roles of leadership existing beyond a single individual and being shared across a team. As we have seen, in organisations and educational settings, this is described as shared, distributed or

collective leadership, in teaching it is often called team, collaborative or co-teaching (Cook and Friend; Friend et al., 2010; Harris and Harvey; Roth and Tobin; Wenger and Hornyak), or in management education, co-facilitation (Hogan, 2005; Knight and Scott, 1997).

1.3.4.1 Co-teaching/Co-Facilitation

Co-Teaching emerged as a format of classroom instruction in response to the increased complexities of including special education students in mainstream classrooms (Cook and Friend, 1995; Friend et al., 2010; Reinhiller, 1996). Initially, the format involved collaboration between a 'classroom teacher' and a 'special education teacher'. Since then, Co-Teaching has evolved beyond inclusive classrooms to also being used across K-12 classrooms (Cook and Friend, 1995; Friend et al., 2010), higher education (Bryant et al., 2014; Ferguson and Wilson, 2011; Harris and Harvey, 2000; Lester and Evans, 2009), teacher development (Pancsofar and Petroff, 2013; Roth et al., 1999), as well as professional and management settings (Crow and Smith, 2003; Easterby-Smith and Olve, 1984; Wenger and Hornyak, 1999).

In using these terms of co-teaching and co-facilitation it is important to ensure alignment of their constructs, before discussing them as one. Historically, teaching has tended to refer to the expert led, knowledge based didactic model (Freire, 2005), and facilitation has tended to be more inclusive and constructionist (Hogan, 2005; Knight and Scott, 1997). However, the educational transformation described above means that teachers are spending less time 'teaching' and more time facilitating student learning (Conklin, 2013; Harker, 2009; Mercer-Mapstone et al., 2017). In this respect, co-teaching and co-facilitation are addressed similarly in the literature, with formal educational settings tending to 'teach' where professional development settings 'facilitate'.

Robinson and Schaible (1995, p. 57) defined collaborative teaching as "any academic experience in which two professors work together in designing and teaching a course that itself uses group learning techniques". Co-facilitation involves

> "two or more facilitators working in partnership to enable a group and
>
> its individual members to reach an agreed outcome in a way that
>
> maximizes their own and other's learning, through the active
>
> involvement of all"
>
> (Knight and Scott, 1997, p. p. 11).

Comparing these definitions of co-teaching and co-facilitation, the key difference is the noun used to describe those delivering the programme. These definitions each reflect the full range of collaboration, across the entire programme from lesson planning, through delivery and evaluation, as well as the micro level relating to classroom interactions. Most relevant to this study are the classroom interactions of the two facilitators/teachers.

Like shared leadership, these shared-classroom interactions can take a number of different forms that reflect a "rough continuum … according to the possibilities they allow for greater student control over the teaching process" (Easterby-Smith and Olve, 1984, p. 228). Cook and Friend (i.e. Cook and Friend, 1995; Friend et al., 2010) describe a range of six different approaches used inside the classroom to distinguish the structural format of co-teaching. These approaches are as follows:

1. One teacher - one observer
2. One teacher - one assistant
3. Station teaching
4. Alternate teaching
5. Parallel teaching
6. Teaming

These six approaches to team teaching form a continuum of sorts based upon the level of concurrent sharing of the teaching role (Contractor et al., 2012; Dust and Ziegert, 2015; Easterby-Smith and Olve, 1984; Nevin et al., 2009; Scruggs et al., 2007). Least shared is a teacher and observer, where the teacher teaches and the observer, while present, remains passive. More active, is the teacher-assistant approach where power and responsibility are clearly asymmetrical, yet both are present in service of the class. Station teaching is described as splitting the class into three groups, students then rotate across all three, one each facilitated or supervised by a teacher and an individual work station. Alternate teaching involves the alternation or turn-taking of co-teachers across a class or programme and is similar to rotational leadership (Contractor et al., 2012). Parallel teaching involves the allocation of different class sections to each teacher who then (essentially) teach their group independently. Finally, the most concurrently aligned format is team teaching (though this term is also used to refer to any of the other approaches). Team teaching is described by Roth and Tobin (Roth et al., 1999; Roth and Tobin, 2002; 2004; Roth et al., 2002) as teaching "at the elbow of another".

Exploring the Co-Teaching Continuum through the lens of co-leadership.

Connecting back to where we began, I have observed that this continuum within Co-Teaching and Co-Facilitation aligns with the research into shared leadership. Reconnecting with the definition of shared leadership, Pearce (2004, p. 48) explains that:

> "shared leadership entails a simultaneous, ongoing, mutual influence
> process within a team that is characterized by "serial emergence" of
> official as well as unofficial leaders. In this sense, shared leadership
> can be considered a manifestation of fully developed empowerment in
> teams."

This definition matches those of co-teaching and co-facilitation in that multiple people are interacting with each other and contributing to support the attainment of group aims, and the empowerment and active participation of those not (or not currently) leading.

Connecting with the literature of shared leadership, co-teaching is shared leadership. Specifically, it reflects a pooled leadership format (Denis et al., 2012/2015) where a specific subset of the group share the leadership role (Contractor et al., 2012; Dust and Ziegert, 2015). The different approaches described by Cook and Friend (1995) reflect different levels of "dispersion of leadership through role co-enactment" (Dust and Ziegert, 2015, p. 3), or dimension of time (i.e. when are different individuals 'leading') (Contractor et al., 2012).

These models of shared leadership and co-teaching/facilitation provide a structure upon which to situate this current research. With leadership theory, educational leadership and teaching all exploring forms of shared leadership, my experience of leadership development has shown that there are opportunities for greater levels of concurrency and co-enactment in how leadership development workshops are facilitated.

1.3.5 Leader and Leadership Development

The progress of leadership development has paralleled, though, lagged behind the progress of these other research areas (Ardichvili et al., 2016; Day and Dragoni, 2015; Day and Harrison, 2007; DeRue and Workman, 2012; O'Connell, 2014; Pearce, 2007). Describing this lag, Day (2000) explained that the traditional, individual, view of leader development has been persistent in organisations in their approaches to the develop human capital.

These traditional approaches have focussed upon the development of individual leaders, generally aimed at building knowledge regarding theories of leadership, and the individual skills and behaviours of 'doing' leadership. Other, more personal approaches have sought to enhance areas of self-awareness, self-regulation and self-motivation, intended to increase

organisational performance (and leadership) through the enhanced enactment of behaviours in these areas (Day, 2000; Day et al., 2014; Kennedy et al., 2013; Petrie, 2014). Such individual (leader) focussed approaches continue to remain common, in part due to the popular Heroic view of leadership and reinforced by the connection between traditional behavioural theories of leadership and recent organisational focus upon behavioural and competency models (Bolden and Gosling, 2006; Carroll et al., 2008; Day et al., 2014; Ruderman et al., 2014). These individually focussed leader approaches, however, have tended to ignore the "complex interaction between the designated leader and the social and organizational environment" (Day, 2000, p. 583).

To begin to address this, leadership development approaches have expanded to better facilitate what 'Leaders' were doing beyond the classroom. These contextually embedded approaches begin to extend the individual view to also incorporate the social aspects of leadership and often involve 360-degree feedback, coaching, mentoring, building leadership networks, developmental job assignments and action learning (Day, 2000; Leonard and Lang, 2010; Smith, 2001; Trehan and Pedler, 2009).

Further development of leaders and leadership also incorporates concepts of authentic leadership and social mechanisms such as Leader-Member Exchange (LMX) to attend to the interaction of "social-psychological processes" and "contextual influences" to create high quality relationships (HQR) (i.e. Avolio and Gardner, 2005; Day et al., 2014, p. 66; Dutton and Heaphy, 2003). These intra-personal approaches have sought to develop identity, character and values of who leaders are 'being' (Ardichvili et al., 2016; Day et al., 2014; Pearce, 2007; Snook et al., 2012).

Taking a lifespan view of developing leadership further extends these concepts of adult development and identity theories as they seek to support the growth of individual leaders to

increase their ability to integrate, and positively respond to, increasing complexity and paradox (i.e. Anderson and Adams, 2016; Day et al., 2014; Day et al., 2009; Fletcher, 2003; Kegan, 1982; McCauley et al., 2006; Strang and Kuhnert, 2009; Wilber, 2000).

In the literature, these models, often referred to as Constructive-Development, see adult development as progressing through a series of different levels where individuals at each level constructs reality differently (Ardichvili et al., 2016; Day et al., 2014; McCauley et al., 2006; O'Connell, 2014; Russell and Kuhnert, 1992). As individuals progress through these levels, the way that they previously constructed reality (their subjective view) becomes objective and now the individual is able to see how they had previously viewed the world.

In summary, individuals progressing through these levels move toward world views that are more integral and interdependent, and able to flourish with increasing levels of complexity and paradox. Leaders at these levels are better able to identify and leverage the interdependent and emergent nature of the complex systems within which they operate (Anderson and Adams, 2016; Covey, 2004; Laloux, 2014; McCauley et al., 2006; Murphy et al., 2018; Palus et al., 2012; Wilber, 2000).

Personally, I have observed that leadership development has evolved both in how the development of leadership is seen to occur, and in the approaches used to develop it. The development of leadership has shifted from a narrow focus on leaders, to more socially and contextually connected views that reflect the increasing complexity of modern leadership. Building upon these views, the practical development of leadership has also transitioned from expert led, content centric, didactic 'teaching' to learner centred, integrated and experiential 'facilitated' approaches that better reflect the socially constructed nature of leadership itself.

With classroom delivery a major part of organisational leadership development programmes, the role of 'teaching' leadership becomes essential (Crosby, 2016; Snook et al., 2012).

However, my personal experience reflects that when leadership has been shared in the delivery leadership development programmes, it tends to utilise a rotational (alternating) approach whereby multiple workshop leaders take it in turns to independently lead programme sections.

1.3.6 Why is this research important?

Overall, this review of the literature has observed the convergence and integration of the previously independent research disciplines of leadership theory, leadership development, education and teaching to show the parallel nature of how these fields are evolving. This evolution reflects a transition from linear, hierarchical models where an individual can hold all necessary information to control (organisational, educational or societal) systems to an approach that is much more collaborative and inclusive, both in its theoretical and philosophical approaches, and in how these are leveraged to build capacity in others.

Leadership development consulting is an industry that sits at the centre of these areas and is moving towards a greater alignment of theory and practice. This study began with a realisation that while many leadership development programmes have evolved beyond the didactic teaching model delivered by a subject matter expert, many have transitioned only as far as the inclusion of multiple (single) experts delivering programmes in an alternate (Cook and Friend, 1995) serial (Easterby-Smith and Olve, 1984; Nevin et al., 2009) or rotational (Contractor et al., 2012; Cook and Friend, 1995; Easterby-Smith and Olve, 1984; Nevin et al., 2009) manner.

1.4 Organisational Context for this Study

1.4.1 What is Co-Active Leadership?

Most examples I have seen of co-facilitation reflected the differential allocation of programme segments between 'team members' allowing 'co-leaders' to rotate through the

role of active facilitator (Contractor et al., 2012; Cook and Friend, 1995). Co-Active

Leadership is different in that it requires two leaders to concurrently enact the role of

facilitator. This involves both leaders sitting at the front of the class, both leaders giving

instructions and both leaders facilitating the debrief of activities. With an increasing trend

from single to relational and shared forms of leadership (D'Innocenzo et al., 2014; Day et al.,

2014; Hernandez et al., 2011), Co-Active Leadership emerged as a powerful and practical

example in my work life that deserved further exploration.

Given the new insights from this literature review, it was clear that this Co-Active approach

to Leadership brought alignment between the content of evolved Leadership Development

Programmes and the manner in which it was delivered. Co-Active Leadership is an approach

to classroom delivery that is anecdotally, much more aligned to concurrent, dynamic

expression of leadership, characterised by two leaders simultaneously sharing the role of

facilitator (Contractor et al., 2012; Cook and Friend, 1995; Easterby-Smith and Olve, 1984).

Involving the concurrent dynamic interaction of two people, Co-Active Leadership appears to

be informed by both pooled leadership (Denis et al., 2012/2015) and team teaching (Cook

and Friend, 1995; Nevin et al., 2009), and specifically the subsets consisting of two co-

leaders (Contractor et al., 2012; Dust and Ziegert, 2015).

The focus of this research is to move beyond anecdotal stories, and to explore the evidence to

better understand this two-leader approach and how implement it in contexts beyond CTI.

1.4.2 Co-Active Leadership – The Book

Any exploration of Co-Active Leadership must connect to, and consider, the popular book of

the same title. In its largest sense, Co-Active Leadership is described as a dimensional model

of leadership (Kimsey-House and Kimsey-House, 2015). Overall, this is a relationally based

model holding that leadership is co-created between people, and that people in all 'roles'

have the opportunity to lead by influencing the system in different ways. Central to this view

is one of agency, or in the words of the authors, "leaders are those who are responsible for

their world", more specifically, those who choose to take responsibility (Kimsey-House and

Kimsey-House, 2015, p. 6). The different dimensions of this model reflect the enactment of

leadership from different positions or roles relative to the situation. For example, Leader at

the Front reflects enactment of leadership from a position hierarchically differentiated from

the followers. Leader Behind reflects the ability (and willingness) those officially referred to

as 'followers' to enact and influence leadership. The Leader Within, reflects the concept of

self-leadership, Leader from the Field involves leadership connected to the larger situation or

context. Finally, Leader Beside reflects leadership enacted by hierarchically equal

individuals, also seen as colleagues or peers.

This multi-dimensional model of leadership also describes the importance of attending to

both the task and relational aspects of Leadership. This is reflected by the phrase 'Co-Active'

where the

> "*co* represents the relational and receptive aspects of our world. The
>
> *active* follows and represents the action-oriented aspects. …
>
> At its most basic, *Co-Active* means simply being in action … together.
>
> Or perhaps it might be more appropriate to say being together … in
>
> action" (Kimsey-House and Kimsey-House, 2015, p. 4).

This research looks specifically, though not exclusively, at what is referred to as the Leader

Beside – two leaders working "at the elbow of another" (Kimsey-House and Kimsey-House,

2015; Roth and Tobin, 2002). With such overlapping in terms, it is important to ensure clarity

as to the focus of this research and the deeper context within which it was conducted.

The Coaches Training Institute (CTI) conducts a coach training programme which is concurrently facilitated (led) by two leaders. The approach used by the two leaders to facilitate in the classroom is the specific focus of this research.

1.4.3 The Research Context – The Coaches Training Institute

The Coaches Training Institute (CTI) was formed in 1992 and according to their website, is

> "the oldest and largest in-person coach training organization in the world, … (having) trained over 55,000 coaches and has also trained employees in more than half of the Fortune 100 companies. CTI's Co-Active Coach® Training Program is widely recognized as the most rigorous coach training and certification program in the industry" (CTI, 2017a).

CTI's Coach Training Programme consists of five highly interactive, in-person workshops each of 2.5 or three days long. Overall, the programme is designed to train participants to apply the Co-Active Model in their lives and to use it along with a series of tools to coach clients to "enhance both the quality and results they experience in life and work" (CTI, 2016, p. 1).

These five modules are sequentially attended by participants, and usually with a spacing between workshops of one month. This means that the journey through all five modules takes place over a four- to five-month period. The focus of each of the workshops is based around three core principles of Co-Active Coaching.

> "The conversation about these principles begins in our **Fundamentals** course. The next three courses focus on the principles themselves: **Fulfillment** — deriving deep meaning and satisfaction from life; **Balance** — viewing the world from an empowered stance, making powerful choices and taking effective action; and **Process**

— fully experiencing the richness of any given moment. The fifth course is **Synergy**,

which integrates all of the learning principles into one powerful cohesive skill called

Co-Active Coaching®." (CTI, 2016, p. 1).

With 12-28 participants, each class also has between one and three past graduates of the

programme, functioning as assistants to provide logistical and relational support. These

assistants are physically positioned outside of the group of participants (i.e. sitting behind),

though at times they may participate in some of the activities to make up numbers.

Leading each workshop, CTI requires two co-facilitators, drawn from their internal pool of

leaders. The process to become a facilitator of these programmes is described as being "the

most rigorous leader training requirements of any coach training school" (CTI, 2017b). In

order to even apply for leader selection, all candidates must have graduated from CTI's

Coaching Certification programme (completing the workshops and an additional six-month

certification) and have completed the year-long CTI Leadership programme. Successful

applicants must then attend and pass an in-person audition, after which those selected then

participate in further development and 'on-the-job' training.

I share information on the extensive journey of leader selection and training as developmental

context to this exploration of Co-Active Leadership. It sheds some light on the importance

that CTI places on workshop facilitation, and part of the developmental journey needed to be

able to co-facilitate as a Co-Active Leader with CTI. In my mind, this also highlights the

importance of exploring this form of leadership which is embedded within CTI's

organisational systems and cultural structures. This research seeks to understand and describe

this form of Co-Leadership that is central to CTI's approach.

1.4.4 My Role with CTI - More specific insight into the local research context

At the beginning of this study, my role was as one of five Front of the Room Leaders working with CTI Dubai. This required me to co-facilitate the coach training workshops, usually with one of my CTI Dubai colleagues, though at times other leaders were flown in from other countries. In addition to the co-facilitation of these programmes, l was one of the two most senior Front of the Room Leaders in the Middle East (with three new leaders having joined the team in 2013/2014). This difference in experience meant that there was a role for me in supporting and developing my co-leaders, yet, as I began the research I did not have enough experienced to formally be included in the facilitator training team. Membership of this team has historically been defined through having gained sufficient experience as a Co-Leader.

This led to one of the key questions for this study relating to how to develop Co-Active Leadership, and what it means to develop as a Co-Active Leader.

1.5 Conclusion

The review of the literature showed the connection and alignment between research into leadership theory, educational leadership, leader and leadership development, teaching and facilitation. Each of these fields have expanded from individually focussed, linear perspectives based upon knowledge and skill to more integrated and constructionist views involving interaction, engagement and empowerment, which has been exemplified by the move towards greater sharing of leadership.

When considering my experience of leadership development, the delivery of these programmes has evolved from single expert leaders towards the inclusion of multiple facilitators. The interaction of facilitators, however, tends to involve the rotational transition between leaders where each is individually responsible for delegated components. In these

approaches, collaborative teaching is visible across the programme, yet the classroom interactions tend to remain as interactions with a single or primary leader. With CTI offering a different, approach, utilising the concurrent co-facilitation of their programmes, I saw a unique opportunity within my work context to explore this form of shared facilitation/leadership. Specifically, I saw an opportunity to explore the nature of Co-Active Leadership to subsequently understand how to apply it in other organisations and contexts, especially areas of leadership development espousing similar models of leadership.

Having previously been unsuccessful in bringing this collaborative form of leadership into other organisational settings, one first step to answering this question was seen to be able to describe Co-Active Leadership in a way that others could comprehend the differences between how they currently approached co-facilitation. In addition to understanding the concept, it was also important to be able to evaluate and articulate the impact of this form of leadership to bring greater clarity on which other contexts would justify the implementation of a new form of leadership. Subsequent to these enrolling steps, the third research question of how to develop Co-Active Leadership emerged as becoming important as the successful implementation of this style would require the development of Leaders (and Leadership) to enact it.

Chapter 2: Methodology

This chapter overviews the methodological approaches to this research including a procedural description of how the research was conducted. As a project, this research was conducted in one of my many workplaces which utilises two leaders to lead workshops. While the research questions evolved over the course of the project, the initial design was intended to provide insight into the following areas:

- What is Co-Active Leadership and how can it be described?
- What impact does Co-Active Leadership have on participants?
- How can we as leaders (my colleagues and I) develop our ability to lead Co-Actively?

These questions provided a powerful place to begin the exploration supported by the action-reflection cycles which allowed them to evolve and deepen. This evolution helped to bring greater specificity and clarity as the research unfolded.

When considering methodological approaches to this research I was initially torn between phenomenological and grounded theory approaches. In this, both were driven by the use of interviews to collect data from participants but to serve different purposes. Grounded theory is a qualitative approach to research which facilitates the development of "a theory that explains process, action or, interaction on a topic" and is grounded in the data itself (Creswell, 2013, p. 86; Glaser and Strauss, 1967/2012). Phenomenology on the other does not seek to explain, rather to understand and describe the *essence* of a phenomenon (Creswell, 2013; Husserl, 2012).

As a front of the room leader (workshop co-facilitator) with CTI, I had personally experienced and witnessed the impact of the programme and how it is facilitated, yet neither I nor others could adequately describe the experience to those who had not experienced it. It became one of those things that 'you just had to experience yourself,' and was often described as such. It was from this experience that the desire to understand and describe Co-Active Leadership

emerged. So, while I was more familiar with grounded approaches to research, this study called for a different approach, one that was attuned to capturing the experience that 'you just had to have'.

2.1 Phenomenology

Phenomenology is a philosophical and methodological approach to the study of phenomena as described by the exploration of subjective lived experience (Creswell, 2013; Holt and Sandberg, 2011; Ihde, 2012). It is based upon the Kantian premise that the external world is an internal construction built from various sensory inputs and that one can explore the world through examination of these created 'thought objects', also known as phenomena (Creswell, 2013; Kaufer and Chemero, 2015; Van Manen, 2014). By examining such phenomena, Husserl argued that we can "restore the originating influence of persons who experience it … hence the primary concern of the phenomenologist is not whether things or objects actually exist, but whether these are intended in consciousness" (Holt, 2008, p. 152). In this manner phenomenological approaches seek to distil the universal essence of a phenomenon by describing the commonalities of participants' lived experience (Creswell, 2013; Kaufer and Chemero, 2015; Sanders, 1982). "In simple terms, phenomenology asks: 'what is this or that phenomenon or event like?' " (Van Manen, 2014, Loc 7379).

While phenomenology has had a great impact within organisations, it has primarily been philosophical rather than methodological in how it has influenced organisational researchers and approaches (Holt and Sandberg, 2011). In a review of US and European journals, Holt and Sandberg (2011, p. 236) identified the vast majority of phenomenologically related organisational research to be indirect in that it applies "various interpretive research approaches and social constructionist frameworks". Much less organisational research has been conducted using phenomenological methodologies, though the benefits of these approaches and the power

to understand human experience in organisational settings has been frequently articulated (Gill, 2014).

Methodologically, phenomenology has inspired a broad range of distinct approaches, each building upon or inspired by different aspects or traditions of phenomenological philosophy leading to a broad range of methodological diversity falling under this heading (Gill, 2014; Holt and Sandberg, 2011; Moustakas, 1994). Noting this lack of methodological specificity, Gill (2014) reviewed the use of phenomenological research in organisations and described the application of five different approaches. In each description, the philosophical history as well as key researchers was presented in addition to a brief methodological overview highlighting key differences. This provided a useful way to review subtle differences and to move away from phenomenological philosophy into more structured methodological approaches. One example of the philosophical/methodological overlay lies in the difference between the views of Husserl and Heidegger. Husserl, building on the Cartesian view of the world, saw need to bracket out ones' own experience (*epoché*) to facilitate a 'transcendental reduction' allowing the essence of the phenomenon to be seen beyond the background of the 'everyday life' (Gill, 2014; Husserl, 2012; Kaufer and Chemero, 2015).

In contrast, the work of Heidegger and others presented that this background of individual experience was integral to both the research context and the very being of the phenomenon. This interpretive view was important as the self and the world were not seen as distinct and separate as suggested by the Cartesian subject-object division, thus requiring the self and world to be a 'single entity' or Dasein (Gill, 2014, p. 120; Kaufer and Chemero, 2015; Smith et al., 2009). From this view, for a researcher to bracket their experience and world view would be to artificially separate oneself from the research context in a false attempt to create the subject-object distinction.

Having overviewed five different phenomenological approaches, (Gill, 2014) explained the important steps in identifying an approach relevant to both the perspectives of the researcher and the need of the research questions. The steps include identifying the epistemological and ontological positioning of the researcher, and specifically how this aligns with the descriptive approaches inspired by Husserl, or the interpretive approaches inspired by the "worldliness of our existence" of Heidegger , Merleau-Ponty's "embodied nature of our relationship to the world" or Sartre's attention to meaning influenced by being in relationship to others (Gill, 2014; Smith et al., 2009).

Having reviewed these perspectives on phenomenology, I initially I found myself aligned to approaches based upon the work of Husserl. I saw importance in bracketing out my own experience to prevent its contamination of the experience of others, especially due to the insider nature of the research where bracketing would help in the management of multiple roles and overlapping relationships (Coghlan, 2001; Creswell, 2013; Gill, 2014; Husserl, 2012; Moustakas, 1994; Sanders, 1982). In this view, by letting go of and stepping beyond my current 'natural attitude', "*transcendental phenomenology"* is established as a "science of essential Being … aim(ed) exclusively at establishing 'knowledge of essences' " (Husserl, 2012, p. 3; Loc 1401; LeVasseur, 2003). This "science of essential Being" felt very connected to my previous research experiences and my, historically positivistic, view and it felt like an approach that would help me to scientifically explore the being of leadership, helping me to get beyond the anecdotes I began with (Husserl, 2012, p. 3; Loc 1401).

Further reflection upon this point, with myself and my research supervisor, led me to see a collapsing of perspectives. I realised that I was intending to hold an objective separation for the interview portion of the research, yet a subjective inclusion for the Action Research component. In essence, I was defining my role as a researcher as being outside of the phenomenon of interest, while simultaneously being an integral part of the system to which

this understanding was being applied. These conflicting views led to much personal dissonance early in the study. Interestingly, they also seemed to reflect an attachment to my 'natural attitude' rather than moving beyond it. I realised that I was still attached to my initial positivistic and objective research view, which I had initially developed through my early research training in biological sciences and cognitive psychology. It was a conflict between me as a Scholar, and me as a practitioner.

Realising this, a question emerged for me as to whether I could completely separate myself (i.e. bracket myself out) of the research, and if I could, would this be of greatest service to the study? Exploring this further, it was important for me, as a researcher, to let go of my previous assumptions around both the topic of interest, and my approaches to it. In essence, I sought to bring great curiosity and openness, with a willingness to explore the topic through the eyes of another. In this way, I realised that this reflection was much more than deciding upon the philosophical standpoint of how to research the phenomenon of Co-Active Leadership. It also contained a consideration of my relationship to, and with, the topic, the research, participants, and the organisational contexts. It was also a question as to what extent I could 'Bracket Out' any previous assumptions, experience or knowledge of what I thought Co-Active Leadership was, in order to be open to seeing the essence of what it is (Gill, 2014; Hamill and Sinclair, 2010; Husserl, 2012; LeVasseur, 2003; Smith et al., 2009).

To this end, it was useful for me to be explicit about what I was seeking to discover and explore during the interviews in a way that allowed me to be present, yet open. My aim emerged as understanding how Co-Active Leadership was experienced from the different perspectives of those interviewed. By defining it in this way, I was able to let go of many of my own assumptions, for these were my perspective, and to give myself permission to be immersed in the perspective of others.

2.1.1 Research design

With the aim of exploring Co-Active Leadership, there were multiple perspectives of the phenomenon to examine through interviewing the participants and assistants from each course, as well as my regional co-leaders. In addition to this, I initially sought to incorporate direct observation of Co-Active Leadership through the use of video recording (Gill, 2014; Pink, 2001; 2013; Sanders, 1982). This design reflected a way to capture data from multiple perspectives to better triangulate the essence of Co-Active Leadership. This approach included the collection of experiences from both within the Co-Active Leadership Dyad (i.e. Co-Active Leaders) and from the outside, through analysis of workshop participant and assistant interviews and the video recording.

In her overview of the use of phenomenology in organisational research, Sanders (1982, p. 356) explains that "there are three fundamental components in a phenomenological research design:

1. Determining the limits of what and who is to be investigated.
2. Collection of data.
3. Phenomenological analysis of the data".

2.1.2 Determination of Limits

In determining the scope and limits of research, one must ensure that the questions are phenomenologically formulated (Moustakas, 1994, Ch 6; Van Manen, 2014, Ch 10). This brings insight into the research direction while providing scope to reflect upon its methodological relevance. With clear questions, co-researchers (participants) can be identified who have the relevant experience to adequately contribute to their exploration.

2.1.2.1 Defining the Research Questions

In seeking to Understand and develop Co-Active Leadership, three research questions were identified:

1. What is Co-Active Leadership?
2. What impact does it have?
3. How can Co-Active Leadership be developed in programme leaders?

When specifying a phenomenological research question, the design and intent of the question must adhere to a list of specific characteristics. In referring to the research question, Moustakas (1994, p. 105) suggests that

> "it has definite characteristics:
>
> - It seeks to reveal more fully the essence and meanings of human experience
> - It seeks to uncover the qualitative rather than quantitative factors in behaviour and experience
> - It engages the total self of the research participant, and sustains personal and passionate involvement
> - It does not seek to predict or to determine causal relationships
> - It is illuminated through careful, comprehensive descriptions, vivid and accurate renderings of the experience, rather than measurements, ratings or scores"

Using these characteristics, the first two question show relevance to a phenomenological exploration. They are both focussed upon the exploration of human experience in a qualitative, descriptive way. Having emerged from my passion as a Co-Leader they are each personally relevant and topics of passion for me. They seek to understand and describe a phenomenon and will be served by rich personal descriptions of co-researchers to crystallise a picture of the experience. These questions, however needed to be rephrased slightly to more effectively clarify their phenomenological nature. Specifically, the general nature of "What is…" was to be replaced allowing the question to emerge as:

1. How do people experience Co-Active Leadership?
2. How do they describe their experience of being impacted by it?

These changes made explicit the phenomenological nature of the questions by focussing, not on the noematic and transmitted nature of Co-Active Leadership, rather attending to how this phenomenon was experienced by participants (Kaufer and Chemero, 2015).

These characteristics also show how the third question was more relevant to the ongoing application and understanding of Action Research cycles, than it was to the phenomenological exploration. In this manner, the development of Co-Active Leaders is a higher-level question, more encompassing of the research journey. Detailed later in this chapter, it provided a guide to how the experiential exploration would serve me as a researcher and as a leader as research and practice were aligned to develop myself and co-leaders.

As a result of reviewing these characteristics, it became clear that the phrasing of this third question also needed to evolve. Initially, the question was not aligned with the use of phenomenological research as it looked at developing a quality internal to the leaders, something that was only partially explored by the first two questions. In order to build upon and complement the holistic phenomenological research approach, the question evolved into:

3. How can Co-Active Leaders enhance participant experience of co-active leadership to increase its positive impact?

This new question remained action focussed, while specifically attending to the participant experience explored phenomenologically. In this manner it provided connection between the phenomenological and Action components of this research.

2.1.2.2 Defining Co-Researchers

With clarity of the what, co-researchers were then identified, these formed the research participants from whom the data were collected (Moustakas, 1994; Sanders, 1982). In order to be able to effectively articulate the experience of Co-Active Leadership, all roles in the workshop were invited to contribute their experiences. Of these, workshop participants were

an essential group, as they were the ones truly receiving the impact and effects from the Co-Leadership dyads. Collecting data from within the Co-Leadership dyad was another perspective included to provide more completeness of the experience, which gave access to information from inside, as well as from outside of the Co-Active Leadership dyad.

The third group to be included in the interviews was that of workshop assistants. While workshop participants are experiencing Co-Active Leadership and the workshop itself, the role of assistant positions them outside of the experience, in more of an observer role where they are better placed to attend to what is happening across the entire room and everyone in it. Logistically, the role of assistants requires that they sit at the back (or sides) of the workshop room. They may be included in small group (groups of 2 or 3) activities, though do not contribute in the large group debriefs. As such, assistants are able to observe both participant reactions to Co-Active Leadership as well as what Leaders do to create them.

Additionally, in order to become an assistant, it is a requirement that one has completed all courses in the series, up to and including the assisted course, though it is common for assistants to have completed all courses in the programme before coming back to assist. In this manner, Assistants have some familiarity with the content of the workshop and Co-Active Leadership so now get to observe the bigger picture of what is emerging in the room, allowing them to provide a unique and rich perspective.

Collecting experiences from these three perspectives, provided data from inside Co-Active Leadership (co-leaders) as well as its view from outside with direct recipients of Co-Active Leadership (participants) as well as observers (assistants) of the courses.

2.1.3 Collection of Data

Sanders (1982) highlighted three key approaches to data collection within phenomenological studies. These included the use of semi-structured interviews, documentary studies using

participant writing, and observation. For this study, I planned to use two of these three approaches, engaging in semi-structured interviews and using video recording as a means to capture audio/visual observations.

When choosing methods of data collection, I considered how different perspectives of the experience of Co-Active Leadership could be captured. In the training room, there were three groups of people, participants, assistants and the Leaders themselves. Co-researchers (volunteers) were identified to represent the experience of each of these groups, from each level of the Coach Training programme (all five workshops).

To provide an external documentation of the phenomenon, a Video camera was used to record one of the workshops. These recordings provided the opportunity for reflective observation of Co-Active Leadership in action. As the research progressed and rich data was collected from the interviews, it became apparent that the inclusion and analysis of Video Data was beyond the scope of what was possible within this dissertation, so the Video component was subsequently removed. The analysis of the video data provides an opportunity for future studies.

2.1.3.1 Ethical Considerations for the conduct of interviews

Given that this was an insider action research project and that I held multiple overlapping roles (Coghlan, 2001; Coghlan and Brannick, 2010), it was important to be aware of and manage any potential perception of coercion or pressure felt by participants. In this respect, I implemented the following steps:

- Before the workshop I was mindful to have a conversation with my workshop Co-Leader and all assistants, to ensure they were adequately briefed on the research, its intent and the steps to gain informed consent from participants.
- During the workshop introduction I included a brief verbal overview of the research, its intent and structure. I was clear to articulate the multiple roles I was engaged in as

both researcher and workshop co-leader and that for this reason information sheets
and consent forms were available on a side table for people to collect and read during
breaks in the course. I also explained that my colleague, the assistants and I would be
available to answer questions during the breaks of the course. Additionally, it was
made clear that all interviews would be conducted by me after the completion of the
workshop and that participation was entirely voluntary and would require the
completion of signed informed consent sheets which could be handed to my
colleague, assistants or myself at any point before the completion of the three-day
workshop.

- Information sheets and informed consent forms were then made available in hard
copy in an area of the room, away from my colleague and I to reduce any perception
of pressure or coercion in participants feeling that they were being observed and had
to take a copy.

In total, the following interviews were conducted, shown with total participant numbers from
each course. Courses are numbered in the sequence of the Coach Training programme and the
order that participants attend, not in the order data was collected:

Table 3. Overview of Workshop Dates and Interviews Conducted

Course	Course Date	Participants Interviewed	Total Course Participants	Assistants Interviewed
1	22-24 Jan 2015	3	22	2
2	26-28 Mar 2015	4	25	2
3	8-10 Jan 2015	4	28	1
4	9-11 Apr 2015	2	14	0[a]
5	15-17 Jan 2015	5[b]	26	2

[a] Assistants from this course had been interviewed previously
[b] 1 participant interview failed to record

2.1.3.2 Bracketing

Having reflected upon my understanding of bracketing and its importance, it was clear that my approach was focussed upon how I could remain open to what was to emerge from how others saw the phenomenon. This was important in both data collection and analysis which led me to postpone exploration of the literature until after the data had been analysed so as to be open to what emerged, rather than be influence by theory (Hamill and Sinclair, 2010). Personally, this was especially important to prevent my research perspective falling back into a mode of hypothesis testing.

Before each interview, I sought to let go of what I (thought I) knew, and to approach the research with an open mind, and the curiosity of a beginner. One important step in this was to remind myself that I was not exploring Co-Active Leadership (of which I had a perspective), rather I was exploring how it was understood and experienced by the person I was interviewing (Hamill and Sinclair, 2010; LeVasseur, 2003).

To support this, I was explicit with participants regarding my role as researcher, and that as part of this I would bring a curiosity around the language they used, with the mindset that everything should be understandable to someone who had never experienced Co-Active Leadership. I found this to be an essential step in providing me (as a researcher and Co-Leader) permission to ask questions about words and phrases that I would ordinarily be expected to understand. This allowed and encouraged participants to find their own words when describing the meaning of jargon or workshop related terminology. This design helped me to bring more empathy and curiosity to how participants experienced or understood these concepts (Hamill and Sinclair, 2010).

Reflexive journaling was also implemented at the suggestion of my supervisor, which helped me to reflect upon any assumptions I was bringing and how successful I was in letting these go during interviews (Hamill and Sinclair, 2010). Having been interviewed, participants were

invited to review the transcript and to pay particular attention to how their view was reflected in the document and if there were other parts of their experience that were not fully, or adequately, reflected either because they had forgotten to share these, or that the interview did not provide opportunity. This step provided further opportunity for participants to share experience without limitations (or the perception of limitations) imposed by the interview and interviewer.

2.1.3.3 Interview Conduct

A semi-structured format was used as a basis for participant interviews, which helped to ensure key questions were focussed on participant experience and to maintain my topical 'naivety' given my (personal) experience with the topic. All interviews progressed fluidly in response to participants and the flow of the conversation, though were founded upon this initial set of 6 questions:

1. How would you describe Co-Active Leadership?
2. What was the impact Co-Active Leadership had on you?
3. Has your understanding of Leadership changed as a result of experiencing Co-Active Leadership? If so, how?
4. Where could you apply this style of leadership to your work?
5. What would you want to know more/more about in order to apply this style to your business?
6. Any other Questions I should ask to better understand Co-Active Leadership and its impact?

These questions emerged as the result of conversations with other local CTI leaders (colleagues) and were designed to capture information about Co-Active Leadership and its impact. Over time, the question set evolved to the following list:

1. How would you describe Co-Active Leadership to someone who has not seen it?
2. What was the impact Co-Active Leadership had on you?

3. Has your understanding of Leadership changed as a result of experiencing CAL? If so, in what way?

4. Where could you apply this style of leadership to your work?

5. What would be different if you had Co-Active Leadership at work?

6. What would you want to know more/more about in order to apply this style to your business?

7. There would have been times when the Co-Active Leadership was really working, and times when it was not. What do you see as the difference between these times?

8. Any other Questions I should ask to better understand Co-Active Leadership and its impact?

2.1.3.4 Interview Reflection & Validation Process

Interviews were conducted as soon as possible after the workshop was attended by participants. These were arranged by the researcher and were mostly conducted via a Skype® call made from the researcher's computer to the participant's telephone. Skype® was used as it allowed for call recording. Some interviews were also conducted in person where an audio record was created using voice recording software on an iPhone 6.

Interviews were professionally transcribed shortly after completion. Once transcriptions were received, I verified the transcription accuracy and clarity by reviewing them word for word against the original interview recording, before sending the reviewed transcript to the participant for further verification. This process allowed participants to make any corrections to the transcript and to add or delete any information, again empowering them and reinforcing their voluntary participation in the process. This was a further step to prevent and avoid any perception of coercion through my multiple, insider roles within this study.

After the verification of each interview transcript, I completed a personal, written review of the interview, what I learned and how it related to the research questions. Subsequently, at the completion of all reflections from each workshop, I entered into a reflective cycle conducting a similar written reflection to capture my thinking around what was emerging from that group

of co-researchers. A similar meta-review was conducted at the completion of each interview group; participants, assistants and leaders.

2.1.4 Phenomenological Analysis of the Data

Having collected and validated the interview data, the next step was to explore and interpret what was collected. Sanders (1982) overviewed four levels to the analysis of phenomenological data; description, identification of themes, develop noetic/noematic correlates, and the abstraction of essences. She articulates these four levels as

> "four questions:
>
> 1. How may the phenomenon or experience under investigation be described?
> 2. What are the invariants or themes emergent in those descriptions?
> 3. What are the subjective reflections of those themes?
> 4. What are the essences present in those themes and subjective reflections?" (p. 357)

Moustakas (1994) and Creswell (2013) similarly describe the steps of analysis, though in more detail which made them easier to follow in this study.

Overall, the analysis followed the following procedural flow;

1. Bracketing my own experience through articulating and describing my own experience with the topic
2. Read all interview transcripts from a particular group (Participants, Assistants then Co-Leaders) and identify statements of horizontal significance
3. Cluster significant statements to identify underlying themes
4. Use the emergent themes to create a textural description of the participant experience
5. Describe "how" the experience happened, thus creating a structural description
6. Use these textural and structural descriptions to create a composite description capturing the essence of the phenomenon.

2.1.4.1 Specific Approach to Data Analysis & Review across all interview groups

While these steps were a useful and theoretical guide, the practical approach to data analysis emerged as follows. Broadly speaking, data analysis involved a review of the primary data from each interview source to identify themes emergent from within the data and to begin to code interview segments into these themes. Emergent themes were then explored in greater depth to ensure accuracy of coding and to begin to distinguish or merge the themes.

As I approached the participant interviews, it became clear that with multiple interview questions, the data was too rich and complex to code with a single review of the data. This gave rise to an initial holistic review and coding of the data into primary research themes, followed by more focussed reviews of the data to code specifically for each primary research theme, independently and sequentially. This approach allowed me to hold a specific lens through which I viewed the data to ensure I did not overlook themes, and to allow sub-themes to emerge connected to the lens. This approach also helped me to gain a sense of the theme structure whilst reviewing the primary data.

Each data source was initially viewed independently from the others to allow for differences in perspective to emerge. Specifically, this meant that each new data set was viewed with fresh eyes to see what themes emerged from the initial holistic review, rather than using the emergent structure from other data sources as a foundation to move directly into the deeper focussed review.

The overall analysis structure emerged to reflect the following steps:

1. **Holistic review of data source** (i.e. Participant Interviews)
   a. Gain an overview of the data
   b. Rough coding into the primary research themes
   c. Additional Primary themes emerged in addition to the key research questions
2. **Focussed Data Coding of primary data**

a. Focussed coding of all emergent themes related to the research question of focus

b. Initial Models were created at this point if they emerged from the data

3. **Deep Theme Review of emergent themes**

   a. Each theme was reviewed in more depth to determine

      i. Thematic consistency of coded interview segments

      ii. If it was a single theme, or required dividing into sub themes

      iii. if it was sufficiently distinct from other themes, or if it should be combined with others

   b. This resulted in greater clarity of the themes and a better understanding to begin to model the themes and their relationship to each other.

4. **Model Themes**

   a. A model was created integrating and combining the emergent themes and showing how they seemed to fit together.

Steps 2-4 of the above process was then repeated for the next research question. Once the participant interviews had been analysed, the above steps were repeated for the other interview sources (Assistants and then Leaders).

To support this analysis, all interviews were imported into NVivo 10 which was used as the platform for analysis.

2.1.4.2 Journaling

Journaling was used to provide me with a way to capture my experiences and learning in a way that allowed me to reflect back upon them later. Initially, I began using my email client as a format whereby I would email myself written reflections. I found this to be very useful when sitting at my computer, reading articles or verifying interviews, however this became difficult when reflecting on actions and workshop I led with colleagues. For these reflections I found that utilising my iPhone as a recording device allowed me to speak aloud (usually as I drove my car to or from the workshops) and capture these thoughts in real time. I later had these

recordings professionally transcribed to allow further reflection and to include them in later data analysis.

In this manner, Journaling allowed the first layers of reflective cycles, allowing me to articulate my thoughts to later reflect upon these by myself, and with my Doctoral Supervisor. This reflection then allowed me greater clarity on how to move forward into the next cycle of action.

2.2 Action research

In addition to, and overlayed upon, the insider phenomenological approach to research outlined above, was an Action Research protocol. This allowed action to be combined with the research while a broad range of data was being collected and analysed in depth, to reciprocally feed back into further action and exploration.

2.2.1 What is Action Research?

Moving away from the positivistic approach to organisational study, action research provides a practical based format of research attending to both sides of the scholar practitioner divide (Aram and Salipante, 2003; Rynes et al., 2001; Shrivastava, 1987). Action Research seeks to bring research within the organisational system generating relevant outcomes that include both insight and action.

Raelin (1999, p. 116) suggested that "action research, itself, constitutes a process wherein researchers participate in studies both as subjects and objects with the explicit intention of bringing about change through the research process." In its simplest sense, it is a recursive process of action, and research whereby each step is informed by the previous and in turn informs the next (Checkland and Holwell, 1998; Coghlan and Brannick, 2010; Greenwood and Levin, 2007). More than this, Action Research also provides an opportunity for "collaborative knowledge development land action design involving local stakeholders as full partners in mutual learning processes" (Greenwood and Levin, 2007, p. 1).

In this way, Action Research is collaborative and inclusive given that it involves and includes participants as researchers, and often researchers as participants (Coghlan, 2001; Coghlan and Brannick, 2010). This inclusive and collaborative nature means that "action research is inquiry that is done *by* or *with* insiders to an organization or community, but never *to* or *on* them" (Herr and Anderson, 2014, p. 3). Action research is also intended to provide both action and research in relation to an organisationally relevant 'problem' to allow the research to inform subsequent action and action to inform ongoing research. In this manner Action Research as a methodology seeks to take action to meaningfully and positively alter the initial organisational (or communal) situation "in the direction of a more self-managing, liberated, and sustainable state" (Greenwood and Levin, 2007, p. 6). It also values the generation of knowledge, especially the collection of context specific knowledge that can be effectively actioned to create change. Finally, action research is participative in that the research is created with and through local participants who have specific expertise in their workplace and how it operates. Inclusion and empowerment of participants as researchers is key to the broader impacts often seen in action research (Coghlan, 2001; Greenwood and Levin, 2007).

While this overview may appear to be linear and clear, there is great debate and uncertainty as to exactly what consists of Action Research (Cassell and Johnson, 2006). This lack of clarity relates as much to the breadth of application as to the expertise of Action Research practitioners and the research domains from which they stem.

Furthermore, Cassell and Johnson (2006) outline the breadth of action research and the philosophical assumptions underlying five different approaches: experimental, inductive, participatory action research, participatory and deconstructive. Experimental approaches build on the work of Lewin applying scientific method and its positivist assumptions of neutral and objective observation. Inductive approaches describe the use of action research to generate theory from the data and to develop "thick descriptions of the patterns of subjective meanings

that organizational actors use to make sense of their worlds" (Cassell and Johnson, 2006, p. 793).

The inductive approach is one that "seek(s) to inductively access research participants' cultures in their natural contexts" in order to generate descriptions of how participants make sense of their worlds (Cassell and Johnson, 2006, p. 793). This approach seeks to maintain neutral observational language replacing the subject-object dualism of positivity with one that is more subject-subject from the perspective of a "third-person point of view" (p. 794).

Participatory action research (PAR) further blurs the line between researcher and participants, often with participant involvement in all stages of the research, from initial design and problem identification through to the implementation of solution strategies (Cassell and Johnson, 2006). This approach leans more into critical theory to "engender critique of the status quo and simultaneously emancipate people from asymmetrical power relations, thereby enfranchising the usually marginalized, and promoting alternative forms of organization" (p. 798).

The final approach refers to deconstructive action research practices which come from a view that reality is subjectively constructed through its definition. Such action research seeks support participants to critically observe their own and others' thinking to be able to question the "familiar and taken-for-granted" to "engender diversity" in thinking and the linguistic construction of communal reality (p. 805-6).

This description of approaches presented by Cassell and Johnson (2006) was useful in situating this study within the inductive frame. While this project was undertaken as insider action research, the intent was to inductively describe how co-active leadership and its impact were experienced from both within and outside of this leadership role. Information and experience was sought from observers and witnesses as well as those actively involved in the creation of

this phenomenon, as such this research is composed of "iterative cycles that alternate between action and reflection, thereby integrating practice and theory" (Dick and Greenwood, 2015).

2.2.2 Insider Action Research

Action research conducted by an organisational employee in and on their work context is defined as insider action research as the action research is conducted by an organisational insider, rather than an external (outside) consultant or research entity (Coghlan, 2001). Such research brings with it unique challenges given the multiple roles and loyalties of the insider researcher. In overview, Coghlan (2001) articulates three key challenges for the insider action researcher: Preunderstanding, Organisational role, and their ability to manage politics.

Preunderstanding involves tacit or explicit knowledge held by the insider researcher about the organisational context and environment (Coghlan, 2001). This knowledge will have been gained through the lived experience of being part of that environment. As an advantage, this allows the insider researcher understanding of the jargon and organisation specific language, provides access and understanding of how to access organisational areas or individuals as well as providing a personal insight into the challenges and thinking of employees. Such insight also has a downside, specifically that the insider researcher can then be too close to the data, making inferences and interpretations not specifically representative of other organisational members. Coghlan (2001) suggests that this may lead to missed opportunities to probe deeper and for further clarification during interviews as an example. Departmental access may also be restricted given existing departmental or hierarchical boundaries.

To manage Preunderstanding in this project, I sought to use bracketing to provide some distance between myself and the experience of my colleagues. One example of this was during the interviews, I designed with co-researchers for them to define terms that were familiar within our coaching context in a way that would make sense to readers of the research. This helped

the interviewees and I to use language that was rich in content while also being accessible to an outside audience. A second example emerged during the workshops where I was intentional to share my research thoughts and interpretations with my Co-Leader, to help bring clarity to my thoughts through their verbalisation, and to allow my colleague to question, challenge or disagree with my thoughts. These conversations with colleagues provided an opportunity to test my emergent understanding, while also allowing us to co-create ways to implement these insights.

Role duality is the second challenge, and refers to the potential for conflict between the roles of employee and that of the researcher (Brannick and Coghlan, 2007; Coghlan and Brannick, 2010). This conflict may lie within the researcher when conflicted to make competing decisions in service of the work, or the study, or externally in how the researcher is viewed and trusted by colleagues and co-workers.

Role Duality was a large and ethical challenge present throughout the research. This was most obvious during the interviews as I was interviewing participants about an impact of Co-Active Leadership that I had been part of creating. This was somewhat mediated by the inclusion of participants across all courses as it allowed them to share specific experiences, while not naming the leaders involved in creating those experiences. This meant that if I (as a leader) had been part of creating a negative experience for a participant, they were able to share their learning in a safe way by omitting which course it occurred in. I was careful to balance the follow up questioning to ensure rich experiences were captured, without participants feeling forced or uncomfortable in sharing. Similarly, this was also a challenge, not because I was the researcher, but also because I was a colleague, and while participants may have been happy sharing their experiences with me, they may not have wanted to be identified as a specific source by other leaders. Anonymity and the chance to review transcripts provided participants

with the space and time to consider their answers and to allow their experience to be included without direct attribution of the source.

Another challenge of Role Duality that emerged, was the overlap between Co-Leader and Researcher. During one course in particular, my role as a researcher created a negative impact on the relationship with my colleague. They reported feeling pressured and uncomfortable leading with me (as a researcher). Fortunately, this understanding emerged as part of our regular review conversations and I was able to refocus my attention upon building and maintaining a strong connection with my colleague, loosening my hold on the research with this colleague.

Organisational politics is also something to be considered for an insider action researcher. Action research by its very nature seeks research to serve in action resulting in change, organisations or parts of the organisation may not view such change positively, or see such change as an attack or threat to current practices (Coghlan, 2001). Combining this with the emancipatory nature of action research, actions to redress power balances or to change the distribution of power may be seen as threats within the company (Cassell and Johnson, 2006; Coghlan, 2001; Coghlan and Brannick, 2010).

While I did not see any negative impact of organisational politics, I do believe that my being both the researcher and senior leader for many courses impacted the relationship and perceived balance of power between myself and my colleagues. This was most evident in the above example where I was asked to address the balance of my focus and to attend more to co-leading as there was conflict and challenge emerging between myself and my co-leader.

2.2.3 Advantages & Disadvantages

Harris (2008) outlines some of the challenges associated with action research. The first of these is that action research is not theory driven. This is a change from the historical, positivist

approach to research where knowledge gaps identified from the literature drive research. Action research instead, holds a different ontological approach in that knowledge is not sought for knowledge itself; rather it is sought in the context of situational change. This leads into a second challenge of action research which is the 'dance' between relevance and rigour. Being contextually embedded, action research is intended to bring rigorous methodological approaches to research in an often very specific organisational context (Aram and Salipante, 2003; Shrivastava, 1987). While this often leads to challenges in generalising the knowledge beyond the environment within which it was created it also adds value through increased contextual specificity to make meaningful change on a specific sample.

Again, from this positivistic perspective, the confounding of researcher and participant roles means that the researcher takes action to create desired outcomes, influencing the system and its operations. When this is an outsider action research project (i.e. researchers are external to the organisation) it has the impact on changing the system for the time of the research, by the very presence of the research project and researcher.

In describing the epistemological foundation for action research, Greenwood and Levin (2007, p. 67) describe the important role of research credibility which they define as "the arguments and the processes necessary for having someone trust research results". This definition moves evaluation of the research output from one of being law driven and universally 'right' or valid, to one where the audience can sufficiently follow the research thinking to believe the presented results. Greenwood and Levin (2007) explain that in action research credibility applies to whether solutions to the identified problem are workable, whether the process results in increased sense making and finally, how has the research been connected beyond the initial context, to include history and the broader context.

2.2.4 Action Research Cycles

Given the complexity of this research and my multiple, overlapping roles, it was important to define multiple distinct levels of reflection.

The following reflective loops were identified and will be detailed in increasingly strategic levels of reflection:

1. Self as Co-Leader with workshop Co-Leader (Within the same workshop)
2. Self as Co-Leader with New Co-Leaders (Consecutive workshops)
3. Group of Co-Leaders in a Learning Set (Between workshops)
4. Self as Leader and researcher reflecting with self through Journaling
5. Self as researcher with Supervisor

1. Self as Co-Leader with Co-Leader (Within the same workshop)

In preparing to facilitate each workshop, I agreed with my co-leaders for us to include reflective cycles in our approach, while this approach is generally part of leading the workshops, I was explicit about ensuring this happened to be intentional about their inclusion. This allowed us to utilise the natural pause points of the workshop (breaks, lunch, etc.) to have brief conversations to reflect on what had just happened and what was emerging. These conversations began by looking at what was being created within the workshop, in terms of the impact that our facilitation was having on the participants. As the conversations progressed, we also began to incorporate questions about how we were leading together, both how it felt from within the leadership team and also the impact we saw it having on the participants and the learning environment. These conversations also allowed us space to explore the relationship that was emerging between us and to make changes if things were off track. Due to the 'in the moment' nature of these reflective cycles, they were not recorded to actively capture or reflect

the learning and action components, rather they enabled realignment, and adaptation of the Co-Leadership dyad.

2. Self as Co-Leader with New Co-Leaders (Sequential workshops)

As the primary researcher on this project, I provided a continuous thread in my own experience as both a leader and researcher. This allowed me to share learning from previous workshops that was being accumulated, with my next co-leading partner. This provided a reflective spiral where each workshop incorporated and built upon the insights from previous leads. To the extent that colleagues were interested, this provided the opportunity for me to share my learning from the research, and for my colleague to react to this. Where relevant, it also allowed us to integrate this learning into our work together.

3. Group of Co-Leaders in Learning Set (Between workshops)

Initially, this layer of action research cycles was intended to be conducted with a group of regional co-leaders. Of the five co-leaders based in and around Dubai, I had proposed for us to sit together in order to reflectively review and evaluate the emergent data before constructing meaning and planning the next steps we could take as individuals and as a group (Coghlan, 2011; Coghlan and Brannick, 2010). Unfortunately, due the volunteer nature of this role as facilitators (it is only a small part of Co-Leaders' business commitments), scheduling and coordinating such meetings soon proved to be impossible. At this point, the decision was made to forego such simultaneous group reflective cycles leaving the learning to be integrated by co-leading pairs through pairwise transmission.

Having said this, ad hoc reflection groups did emerge with co-leaders as we engaged in an external training course together. In this manner, a range of actions and experiences were able to be included to serve the greater learning of us as co-leaders, as well as to inform this study.

4. Self as Leader and researcher reflecting with self through Journaling

As a form of internal reflection, I employed written and verbal journaling to capture my thoughts, feelings and reactions to workshops and the co-active leadership that was (or was not) emerging. This format allowed me a second loop to begin to articulate feelings and thoughts in order to allow them to be integrated with conscious thought and to provide content upon which to reflect. This format proved extremely useful in better understanding my individual responses to the co-active leadership experience, especially when it was not progressing smoothly. In these cases, this reflective loop helped me to move beyond an emotional response to a situation, and to gain clarity on what I was expecting or needed so I could take this learning back to the relationship and have a conversation with my co-leader

5. Self as researcher with Supervisor

To ensure project level reflections, I regularly met with my Doctoral Supervisor (Dr Elly Philpott) who acted as a critical sounding board for emergent understanding as well as methodological and research approaches. Additionally, her questions and insight reminded me to look broadly in the literature and helped to focus questions that were taken back to the research or to the literature. Her questions helped to make visible key assumptions I was holding, for example what I meant when I spoke of connection. Until this question was posed, it was clear and obvious to me what connection was and that others would have the same meaning. Only through considering the question did the assumptions become clear allowing me to manage this pre-understanding and to look for other areas of such assumption.

2.3 Summary

Overall, this research combined two overlapping and related approaches to facilitate the exploration and understanding the phenomenon of Co-Active Leadership while building capacity to leverage this positively in my workplace. Phenomenology provided the exploratory base to examine the experience of a broad range of co-researchers and the impact of Co-Active

Leadership. Action Research provided an overall collaborative framework to combine action and research to both understand and create results for workshop leaders, assistants and participants. The next chapter describes the analysis of the phenomenological data collected through interviews with the analysis if Action Research outlined in the subsequent Action Chapter.

Chapter 3: Data Analysis

The purpose of this study was to better understand Co-Active Leadership. This is a form of shared leadership that sits at the intersection of research into leadership theory, leadership development, educational research teaching and group facilitation. As described in the introduction, Co-Active Leadership involves two individual leaders coming together in such a manner as to successfully lead a group. In the literature, this form of leadership is described as an example of Dual-Comprehensive (Dust and Ziegert, 2015), or Pooled Leadership (Denis et al., 2012/2015). From the educational literature, it reflects interactive (Easterby-Smith and Olve, 1984), Team (Cook and Friend, 1995) or collaborative teaching (i.e. Bierly et al., 2000; Roth and Tobin, 2004) or facilitation (Hogan, 2005; Knight and Scott, 1997).

While these typological descriptions are useful, this study applied a phenomenological approach to understanding the lived experiences of Co-Active Leadership as told by workshop participants, assistants and the leaders themselves. As I began interviewing participants, the importance of this approach was reinforced by the ease at which people could describe their experiences, and the difficulty they had providing direct descriptions of Co-Active Leadership itself. This research approach allowed a greater focus and exploration of the lived experience of those involved which provided insight into the essence of Co-Active Leadership (Creswell, 2013; Moustakas, 1994).

As described in the Methodology chapter, data was collected from interviews conducted with 18 participants, six assistants and four leaders of the workshops. This provided data from all five workshops in the series and from each position of involvement.

Having conducted the interviews, transcripts were qualitatively analysed for themes relating to the three primary research questions:

1. How do people experience Co-Active Leadership?

2. How do they describe their experience of being impacted by it?

3. How can Co-Active Leaders enhance participant experience of co-active leadership to increase its positive impact?

Interview data was primarily intended to shed light upon the first two of these three questions. While the third research question of how to develop Co-Active Leadership was the focus for Action Research cycles and an overall direction for the project, some insights emerged from the interview analysis.

As I began to write up the research, it became clear that the data were too rich to report everything in sufficient detail within the limits of this dissertation. With this in mind, the focus of this chapter is to report the analysis of data as it ultimately related to the primary research question of how to apply this form of leadership beyond CTI. In this sense, more attention is given to the Description of Co-Active Leadership and how participants felt it could be developed. The Impact of Co-Active Leadership is presented at a high level.

The first section of this chapter provides an overview of the approach to analysis, providing context and clarity for the remaining sections. The middle sections present an integrated analysis as it relates to the three research questions. The final section provides a brief summary of what emerged from the analysis and transitions toward further exploration in the Discussion Chapter.

3.1 Description of Co-Active Leadership

Having interviewed participants, assistants and leaders, the views from each perspective were seen to be aligned, and progressively revealing. Participants and Assistants provided the greatest clarity on what Leaders were doing in the room to create the impact of Co-Active Leadership. Leaders supported this view and provided more insight as to what happens leading up to what participants experienced and 'behind the scenes'. Overall, these multiple

perspectives supported and deepened the descriptions of Co-Active Leadership, allowing

descriptions to be integrated.

This section begins by overviewing insights and themes emergent as the analysis progressed.

It then summarises the emergence of the single leadership entity which was seen to be the

essence of Co-Active Leadership. This is then followed by exploring the progressive levels

described as combining to support the emergence of the Single Leadership Entity.

3.1.1 Emergence of the Models

As the data analysis progressed, it travelled through a series of stages moving from the

broadest reviews of the data, down to deeper examination of the emergent themes.

Throughout these stages, a series of models began to emerge as my understanding of the

themes took shape. The following is a summary of important stages in model development.

3.1.1.1 Initial Structure

Having conducted a high-level review of all participant interviews, I began to see four key

themes emerging relating to how Co-Active Leadership was described. These themes related

to:

- Participant Uncertainty of What Co-Active Leadership Is,
- Two Leaders Operating as One,
- Co-Leader relationship, and
- Individual and Collective Qualities of The Co-Leaders.

3.1.1.2 The Importance of Relationship

After a second, more focussed review of the interviews, and a deeper analysis of the

emergent themes, I paused to consider how the individual themes were beginning to fit

together and to capture the model that was starting to form in my mind. At this point, I was

seeing the themes in a new format, different to the initial model. In this new model I began to

perceive a series of layers which seemed to be based around different levels of analysis. I saw

participants describing:

1. Individual Leaders
2. Leader Pair and their interaction
3. Connected Leadership

Initially, I considered the connection between this and my understanding of different levels of

analysis reflecting the increasing complexity of each layer. However, I soon realised these

layers did not reflect the traditional levels of analysis of increasing group sizes and

complexity, rather they reflected increasingly connected individuals in the intra-individual

space, i.e. a layer between the individual and dyadic levels of analysis.

Considering this concept further, I began to see a series of levels of what seemed to be

connection. In this model, the leaders were represented by the letters **A** and **B**, and their

relationship was reflected in how the two letters were joined.

The themes relating to **Individual Leaders (A.B.)** were seen to be individually or

comparatively focussed. At this level A and B were both present as individual leaders, though

were viewed independently. For example, comments describing the leaders as being different

or holding different views, or themes describing the perceived authenticity and vulnerability

of a particular leader.

The **level of Leader Pair (A&B)** emerged as participants described how the leaders fit and

interacted with each other. The & in **A&B** reflected the interaction of the two leaders. The

focus of this level was the leaders themselves, including themes relating to roles, fit of

leaders, ego and competition.

The **Connected Leadership level (AB)** reflected a higher level of connection between the

Leaders with themes describing the energy of the leaders, the range available from the leaders

(together) as well as the finishing of sentences, flow and harmony from the leadership team. The **AB** of this level, reflects the joining of the Co-leaders to create a single, aligned leadership entity.

While looking at the data through this lens, it became apparent that it was an important way to conceptualise how participants were perceiving and describing the connection between the Co-Leaders. It also clarified the importance of the Co-Leader relationship and how connected the two leaders were in their enactment of Co-Active Leadership. This view was supported by participant descriptions of when Co-Active Leadership was not working.

When reconnecting to the research question of how this model helped to describe Co-Active Leadership, it was seen to provide an overall structure relating to the level of connection between the Co-Leaders, though it did not shed light onto what was happening, or how the single leadership entity emerged. In this manner, seeing the Co-Leader relationship as central to Co-Active Leadership meant that any emerging model structured around such levels of analysis, or locus of leadership would be contingent upon this leader connection. For example, participants could talk about leader differences, but when speaking about Co-Active Leaders, these differences were described as being expressed from within the connected Leadership whole. Leaders were not described independently, rather one leader was contrasted to the other and their differences were expressed as either causing confusion and competition (when not connected) or providing a more rich and interesting experience (when connected).

So, while the locus (or loci) of leadership still felt like an important consideration, at this point in the data analysis I felt it was not sufficient as a differentiating structural factor with which to understand the emergent themes (Hernandez et al., 2011). This realisation reinforced the relevance of the initial model describing Co-Active Leadership which was then

expanded and crystallised over subsequent reviews of the themes. What did remain from this exploration, however, was the centrality of the Co-Leader relationship to the success of Co-Active Leadership.

3.1.1.3 Co-Active Leadership as an Opportunity to Respond

After the deep thematic review, I began a narrative description of the emerging model which allowed me to begin to integrate the themes and to create a cohesive description. This approach allowed me to see how I was conceptualising the themes and to identify any areas of overlap between themes that, on paper, initially appeared to be separate.

One important insight to emerge from this process related to the theme of Benefits of 2 Leaders. This theme was one that had not quite seemed to fit in the model, as at times it felt like a description of Co-Active Leadership, and at other times felt like an impact. In writing a narrative description of this theme, it became clear that the benefits of two leaders emerged as more than a description or an impact. It emerged as an opportunity for the Co-Leaders to create impact. Having two leaders allowed them to better attend and respond to what was emerging in the room, as the non-active (observer) leader could pay specific attention to the impact being created by their active co-leader. From this greater awareness, the co-leadership entity was better placed to respond to the subtleties emerging in the system. Because it was an opportunity, Leaders may or may not act upon this greater awareness to take specific action and create an impact, but this increased awareness meant they were better placed to do so. Thus, the benefit of the 2 leaders was linked to an increased range of potential actions, rather than being related directly to a specific behaviour or relational aspect between the two leaders.

This insight was useful to understand how the Benefits of 2 Leaders seemed to fit into both impact and description, and to appropriately place this theme. The behavioural aspects referred to in this theme remained within Description, and the actual or potential impact of

these behaviours were moved to the research question exploring the Impact of Co-Active

Leadership.

3.1.2 Perspective on the Emergent Description of Co-Active Leadership

At its best, Co-Active Leadership resulted in the perception of two individual leaders merging

to create a Single Leadership Entity. This entity emerged as a synergy of both leaders,

expressing the full range of each individual leader while also providing the opportunity for

them to co-create something more than the sum of their individual contributions. It also

provided a simplicity which allowed participants to easily follow and connect with both the

leaders and the content.

> "I almost did not feel two people. Even though there are two people,
>
> you kind of feel only one leader. Two people is more powerful than
>
> one. ... The beauty is in not feeling that there are two leaders." 05p3

For this powerful synergy to emerge, a number of themes were identified at individual and

dyadic levels relating to both relationships and behaviours.

- Co-Active Commitment
- Individual Leaders
- Co-Leader Design
- Co-Leader Relationship
- Co-Leader Behaviour
- Reflective Feedback
- Single Leadership Entity

Co-Active Leadership began with an intentional decision by individual leaders to be

Committed to this Co-Active form of Leadership. From this intention, **Individual Leaders**

committed to bringing their full range and selves to the Co-Leadership. **Co-leader Design**

was the next theme, supporting the initial coming together of the two leaders. This initial

design was then built upon by the **Relationship** between the leaders, and their **Co-leadership Behaviours** as they combined their unique qualities with those of their co-leader. This connected dyad was supported, and reinforced, by **Reflective Feedback** loops between the co-leaders, allowing them to deepen or recover alignment and connection as needed. As all of these layers came together, leaders were able to finish each other's sentences, dance in a seamless manner and emerge as complementary parts of a larger whole, the **Single Leadership Entity**.

Analysis showed that participant descriptions covered most of these themes, omitting the Leadership Design, which makes sense given design happened prior to participant arrival in the workshops. Assistant data also referred to most areas and began fill in the gaps. Leaders added the Design, though omitted the description of the Single Leadership Entity, seeing this more as a result of good Co-Active Leadership. Leaders focussed upon how they connected, rather than that they were connected. This perspective seemed to reflect a process rather than an outcome focus held by the Co-Leaders.

Participants, however, described the emergence of the Single Leadership Entity as being a key benefit and source of power for Co-Active Leadership. For Participants, the Single Leadership Entity brings simplicity to the complexities of relational leadership, and allows them to follow a Single Leadership Entity, rather than try to follow two separated, individual leaders. This distinction and its impact was further explored and clarified through examples where Co-Active Leadership was not working, referred to as OFF Leadership.

The following provides a more detailed, linear description of the emergent model describing Co-Active Leadership, moving from the individual up to the integrated functioning of the emergent leadership system. However, as with any complex, multi-level system, each of these themes are inter-related both influencing and being influenced by the others.

3.1.2.1 Describing the Theme of Co-Active Commitment

From the beginning, Co-Active Leadership was intentional and deliberate. Leaders spoke about holding a deep commitment to the work, seeing a deeper spiritual side to Co-Active Leadership. Leaders felt great responsibility to each other and to the participants to bring their best selves in service of the transformation of participants.

> "We are here, and we are here because we choose to be here. Not because we have to. Because we choose to be here, and we are at service to ourselves, to our co-leader, and to the room." LDR2

As described later in this chapter, Co-Active Leadership provided a safe space for leaders and participants to bring their full selves, without judgement. For this to happen, however leaders were committed to this form of leadership and fully expressing themselves as part of it, allowing others doing the same.

> "For me, the co-active model is way beyond the words, or way beyond the particles, the co-active model is becoming the best that one can become, in service of another person, in service of relationship, and in service of the citizens... Who we want to be in that city or in that world. And really, … it's about open-heart surgery. It's about... Really it's about, how can we allow, how can we give permission, or allow people to give themselves permission to be totally vulnerable." LDR 2

This deeper view of Co-Active Leadership reflects both a powerful connection to what is possible when people get to be themselves, without judgement, and also a deeper commitment to being who they need to be, to serve this end.

Participants and Assistants also saw the intentional and deliberate nature of CAL, relating Co-Active Leadership to well-rehearsed performances, and alluding to signals between leaders to allow them to lead in such a seamless manner.

3.1.2.2 Describing the *Individual Leader* Qualities brought into Co-Active Leadership

At the individual level, leaders spoke of making an intentional decision to bring their full selves into the lead. Participants described the Leaders as bringing realness, authenticity and vulnerability. In this sense, Leaders allowed themselves to be seen, expressing both positive and negative emotions, and allowing their honest reactions to be part of what was happening. Participants appreciated that the leaders did not pretend to be 'perfect', instead that they allowed themselves to make mistakes, to be human.

> "I think the most powerful thing is how the leaders put themselves out
>
> there, so it doesn't feel that they're not part of the course, because
>
> leaders get coached and they coach, et cetera. So, I think that's
>
> probably what makes it so real, that you don't feel like leaders are that
>
> much different, so I find that really powerful." 03p3

Leaders highlighted the importance of being authentic and vulnerable in that it was a model of behaviours that they wanted to encourage in the classroom. Participants found that when leaders gave themselves permission to not have to be perfect, they could give themselves that same permission.

> "When you work with co-active leadership, you can also see the... Not
>
> the mistakes, but the corrections, how at the moment the leader is
>
> correcting himself or the other leader in a way. … allowing that to be
>
> part and present in the group allows the participants also to be more
>
> open and see that there is no restriction.

> Because when you expose the imperfectness, that gives I think quite
>
> some power, and to the group also, to see that it's not needed to be
>
> perfect." 05p1

Participants saw and appreciated the differences brought by leaders, sharing different parts of themselves, and holding different perspectives. Observers saw different styles, energies and perspectives from each of the leaders. In this sense, the unique contributions of each leader were valued by participants in how they supported the Co-Active Leadership. While these differences were often referred to by comparing the leaders, this is included here at the individual level as the individual leaders needed to individually express their differences for them to be contrasted with the other leader.

In this sense, a Leader's commitment to being Co-Active in their Leadership was expressed by being willing to be authentic, vulnerable and human. To do this Leaders referred to the importance of being non-judgemental and non-critical of self, and for giving themselves permission to bring their full selves.

> "something I'm working on as a leader is not to judge myself. I can be
>
> the worse judge of me, … and I think this is a classic example of how
>
> I as a leader have to do my work, to do this work." LDR 1

3.1.2.3 Describing the Theme of Co-Leader Design

While being intentional, the Co-Leader relationship was also deliberately designed and created. Practically, this occurred in a design conversation between the Co-Leaders before the workshop began. These design conversations concentrated around two key areas, the shared task and the relational environment. This was especially important for leaders who had no relationship prior to the beginning of the workshop and may have been meeting for the first

time on the morning of the first day. Though this design was also important for leaders who had worked together previously to allow them to realign and reconnect.

From a task perspective, leaders identified and aligned around the purpose of the workshops which included alignment on the timelines, but also alignment on the personal outcomes they saw for participants. It allowed leaders to jointly reconnect to foundational models, ideas and concepts upon which the training was based. This task design also allowed leaders to align, and give permission for shared responsibility which, in this context, meant that both leaders are to be responsible for themselves and for their collective success, for both leaders to be (and feel) empowered in their relationship.

> "When being in front of the room, … you're responsible for what's
>
> being created in the room, and having two leaders there, they're
>
> sharing this responsibility. … You're responsible in delivering the
>
> learning equally." LDR 3

In addition to the task alignment, Co-Active Leaders sought to create a relational environment that was filled with joy, fun, positive energy and was a fulfilling experience for themselves, as well as participants. They were intentional about building their relationship in a way that would allow them to work together that was filled with a sense of safety and permission for each leader to be their full authentic selves. This safe space was intended to be one free from judgement or being made to feel wrong, and free from any need of Ego, or competition.

> "Unless I feel safe, I'm not gonna open up, I'm not gonna be
>
> vulnerable in an environment where I don't feel safe." LDR 1

Co-Leaders identified a connection between their relationship and the emergent relationship between them (as Co-Leaders) and participants. In this sense Co-Leader Design was an

important step in not just how Co-Leaders worked together, but also what they created in

their relationship with the room. This connection was confirmed through analysis of

participant and leader experience of the Impact of Co-Active Leadership, described later in

this chapter.

3.1.2.4 Describing the Theme of Co-Leader Relationship

As discussed earlier in how the models emerged, the Co-Leader Relationship was seen as

being central to the success of Co-Active Leadership.

> "I would say... It starts with the relationship... The leading starts with
>
> the relationship between the leaders. And from that relationship, they
>
> start teaching, producing, creating, whatever." 01a1

While as a theme Co-Leader Relationship is very much related to Co-Leader

Design, Co-Leader Design was seen as a discrete step in initiating and

establishing connection between the leaders. This theme of Co-Leader

Relationship was temporally broader and reflected the ongoing creation and

emergence (maintenance) of the Co-Leader relationship, to create what was

intended and initiated in the design.

Specifically, the relationship between Co-Leaders was described as being equal,

with the Co-Leaders seen to share power and to be balanced in their relationship

to each other. This balance was not described from a task perspective in how

much time each leader spent being active or observing across the weekend, rather

it was more relational in the sense that observers described equality in power.

> "they're both on the same level." 02p2

This balance in power extended to the alignment and coordination of the leaders, to ensure

they were working in the same direction, rather than providing conflicting or competing

directions. Observers commented on the lack of ego, competition and role conflict in the Co-Active Leader relationship, stating that the behaviour of the leaders was not about themselves, rather it was focussed on an aligned, higher-order goal.

> "You were completing each other. You were not competing with each other … There wasn't any sense of competition. There was a sense of teamwork. There was so much of coordination and support in that. … You were both concentrating on one goal, which is delivering this training session the best way possible. And I think that's why it was very successful." 01p1

That Leaders could bring diversity and acceptance was highlighted by observers as reflecting a lack of judgement between the two leaders, and a sense of emergent harmony in how they were able to accept and build upon the contributions of the other. This harmonious connection of leaders was seen to be more than geographic, though for much of the workshops, the two leaders were co-located at the front of the room. That the two leaders still felt and were perceived as being connected, even when they were physically located in different parts of the room.

> "When there's a good partnership, it's extremely powerful. The way that the coaches, the leaders complete each other, and the way they both carry the energy and the content of the course, the way they carried the whole classroom, basically" 02p2

This relational connection and the environment of permission and non-judgement that it created for co-leaders allowed leaders to bring their full individual and authentic range, and provided safety between the leaders, supporting diversity. It also extended beyond the co-leadership dyad and was seen to be inviting to and inclusive of participants.

> "because they build together, … they dance together, it means they
>
> invite us in their dance." 02a1.

Overall, this relationship between the co-leaders was seen as a platform from which other aspects of the model emerged.

Co-Active Leadership stopped working when the Relationship was OFF

The centrality of this Relational Connection between the Co-Leaders was reinforced by the descriptions of when Co-Active Leadership was not working (OFF). Descriptions of OFF Leadership showed that Co-Active Leadership did not work when the relationship was not working.

> "There's something about … the connection (between the leaders) and
>
> when it's there whatever happens becomes perfect. It just feels right
>
> and complete, but when it's not there, then kind of whatever happens
>
> feels like it's missing something." Interviewer paraphrase during
>
> interview of 02a1

The overall theme as participants described OFF Leadership was the perceived separation of leaders from a single entity into two individual leaders. As seen in the below quote, this separation occurred in three different forms of separation that created a vertical distinction (Unbalanced), horizontal distinction (Out of Sync - misaligned) or through one Leader becoming an individual focal point (Ego).

> Co-Active Leadership doesn't work "when you feel that one leader
>
> wants to be the star and would undermine what the other says, or
>
> when you see that a leader is there but not full of empathy, or when
>
> you feel that … the training is actually being held by one leader,

because one leader is tremendously good and the other a bit weak."

05p2

Vertical separation emerged when the Co-Leaders were perceived as being hierarchically differentiated. This emerged when a leader's interaction positioned them as being more senior (higher than – a Leader Up action), or more junior (lower than – a Leader Down action) than their colleague. Vertical separation also emerged if the two leaders moved at a different pace, where the faster colleague was always seen to initiate actions, and by default, their co-leader was seen to always follow. Two types of leader behaviour emerged where in their interaction, leaders could position themselves above (Leader Up) or below (Leader Down) their colleague.

Misalignment emerged when the two leaders, even if relationally equal and balanced, moved in different directions. This emerged when leaders were seen to take the group into different activities or move discussions into different areas or topics.

The third theme, or trigger of OFF leadership relates to the actions of one (or both) Leader, being seen as seeking **to highlight themselves**, or bring themselves to the centre of attention. Essentially, this involved a shift of Leader focus from the Co-Leadership Dyad, to the self, making themselves (and/or how they are perceived to be) more important than others (i.e. participants, their co-leader or the leadership dyad). Shifting focus in this manner, created a separation in the Co-Leader Relationship.

These three themes of vertical and horizontal separation and self-focus, negatively affected the relationship between the two leaders and how it was experienced, dissolving the leadership dyad into two, separate, individual leaders. When this separation occurred in the relationship, Co-Active Leadership was no longer present.

3.1.2.5 Describing the Theme of Co-Leadership Behaviours

As we have seen from the Individual Leader theme, co-leaders bring their full selves into their role. When not connected, this authentic expression of their individual unique characteristics, could appear to reinforce the separation between the co-leaders. However, when connected, it emerged as an expression of the extended range of the dyad. In this manner, individual differences combined to create a greater combination of possibility for the dyad. Observers saw that different leader combinations brought significantly different energy to how they perceived the leaders, giving each pair of leaders a uniqueness not present in other pairs.

> "I could appreciate (the) individualism. So, it gave me the opportunity
> to see perspectives from two different angles, although they were both
> presenting on the same material, there were still some different
> personalities. That had a powerful impact." 02p1

> "You both are different, but you kind of complete each other." 03p2

The combining of two leaders, each with a different energy, allowed the leadership pair to bring a combined energy to better serve the room. This combination was seen to create a more stable and engaging energy across the 3-day workshops. Observers explained that

> "it provides a greater balance and more energy, which is, when one of
> the leaders, either his energy is low or it's just, doesn't communicate to
> you in the way you best receive information, then the other one
> balances it out. so overall, it seems a richer experience … when there
> are two people, the feeling is that they complement each other, and so
> the experience is more stable" 01p3

The two leaders adapted themselves to different role requirements and were seen to play both active and 'observing' roles. Active roles reflected the active nature of speaking or visibly doing something. Observing roles were seen to be more observational and attentive. Described by assistants as holding the space, this observing leader was seen to be energetically present and alert to what was happening in the room, yet often silent or still. This observing role provided an opportunity to attend to what was emerging within the room in relation to both the task and relationships, and to consider response options 'in-the-moment'. This greater awareness allowed the leadership dyad to access a greater range of potential responses to address the impact that was emerging in the room. As Leaders were able to respond to what was emerging within the room they could reconnect with disengaging or inattentive participants, deepen the learning and provide a richer experience for participants. These impacts are discussed further under the Impact of Co-Active Leadership later in this chapter.

Having identified active and observational roles of the two leaders, participants described the importance of transitions as leaders switched between these roles, and how they responded to each other as they moved from active to observational roles. These transitions were rapid and frequent, often occurring mid-sentence with leaders smoothly finishing the sentence of their colleague. This theme is directly linked to how leaders were seen to finish each other's sentences as well as how they co-created and played off each other, and it reflects the willingness of each leader to both lead and follow.

> "And one thing that I was impressed with is how, when one of you interrupts the other, the other just stops talking, and then the first one who was interrupted would find a perfect slot to go back into the conversation and continue what he was saying or take over from the other one." 01p1

This quote reflects the willingness of the first leader to transition from actively leading (speaking) to the observer role (following) as the observer transitioned into the active role. While these transitions were not planned or rehearsed, they were perceived as being smooth as the active leader's response to their colleague speaking was to flow with it. In this sense, each leader was willing to complement their Co-Leader with no attachment to their current role.

This permissive contribution of their colleague allowed the co-leadership dyad to co-create the richness described by participants of the Co-Active Leadership experience. The complexity of this interaction was captured as co-leaders were seen to be co-creating from each other and the room.

As a theme, Co-Creating reflected the interaction of Co-leaders and highlights the process of emergence within the connected Co-Leader relationship. It refers to the constructive interactional behaviours of the co-leaders which create something that is often new and greater than the sum of individual behaviours. Leaders were described as creating together and playing off each other in a way that was smooth and flowing between the two of them, and in relation to what was happening and emerging in the room. By having an awareness of their impact (supported by the observational role), co-leaders were able to adapt and adjust 'mid-stream' to ensure the contextual relevance of what was emerging, creating both depth and the smoothness described by participants.

> "So, we literally embrace everything that's going on in the room and
> also be able to deliver a more powerful content as well as
> understanding, and knowledge, and embracing what all the group
> produce together, in a more powerful way because we bring more
> awareness to the room." LDR 2

This behaviour is contingent upon the co-creative interaction of the two connected leaders, and thus dependent upon the Co-Leader Relationship. In this sense, Leaders perceive the relational space as sufficiently safe to voice their contributions, to allow the contributions of the other, and to create from both in new and possibly surprising ways. This safety is supported by back-up behaviours provided by each co-leader. Co-Leader back-up includes having a second set of eyes to attend to what is happening in the room, and also to knowing that their colleague can help to maintain connection with the room, allowing leaders to take more risks and bring more of themselves.

> "I'm just a fellow human being like everybody else, I can get hooked,
>
> ... Stuff triggers me and when that happens I need my co-leader to
>
> hold me, maybe unhook me and to hold the room at the same time. …
>
> (When I lead alone, I cannot allow myself to get hooked) So, in not
>
> allowing myself to potentially get hooked, I play safe. … and that
>
> short-changes the participants of their learning." LDR 1

Participants found that when connected and co-creating, Co-Leaders brought diverse energies and perspectives together in a way that was seen to complement or complete the other. These diverse perspectives and energies contributed by the two leaders, allowed participants to feel that the information presented was more complete, and whole than a perspective or opinion of a single person. They saw the two leaders interacting and combining different perspectives, which at times were significantly different from each other, as better reflecting the paradoxes and complexities of life.

3.1.2.6 Describing the Theme of *Reflective Feedback*

Leaders spoke to the importance of connecting during breaks multiple times per day in addition to sitting together before and after each day. Reflective Feedback was a theme intimately related to both Behaviour and Relationship. By re-connecting and checking in with

each other, leaders were able to learn more about what was happening in the room and to adjust how they were working with each other moving forward.

> "But I think it's the design, the redesign. So, actually sitting together,
>
> understanding what you need from the other person, and actually
>
> be(ing) very open and vulnerable on what you need.
>
> … (by asking ourselves) "So, how are we doing? What can we do?"
>
> "That really worked well, so how can we do this better?"" LDR 4

This reflective feedback played an important role in allowing Co-Leaders to adapt and adjust both their relationship and their behaviours to continually support the emergence of Co-Active Leadership at its best. Because of this connection to two other themes, when considering Reflective Feedback, I explored multiple options for where this fit into the overall model. It emerged as an individual theme because it was seen to be essential to success in both Co-Leader Connection and Co-Leader Behaviour, it was not merely a subset of either.

3.1.2.7 Describing the *Single Leadership Entity*

In its essence, Co-Active Leadership involves the coming together of two individual leaders, in a behaviourally and relationally aligned manner, to seamlessly complement each other in forming a single leadership entity. As mentioned earlier, Leaders felt that the emergence of this Single Leadership Entity was an impact of how they co-led together, while participants felt that it was this coming together of two leaders that created the impact of Co-Leadership.

In forming this single leadership entity, a synergy was seen to emerge allowing both, a greater expression of the range of individual leaders, and a depth and richness beyond that which either leader could create alone. The emergence of this single leadership entity enabled

the workshops to be led in a smooth manner, allowing participants to effectively follow two leaders.

In forming this Single Leadership Entity, co-leaders were seen to dance with each other, as a "waltz" (01p2) or "tango" (01p1). One participant describing it as being "like two masters (of) Tai Chi that sync together. In a way that the moves are very subtle and very fluent and flowing. And it's just the continuity of one movement to the other" (05p1). Another participant captured the alignment and emergent synergy saying

> "(it is) like a band, one has a guitar, one has the bass, but it's only two and it was nice, they're in tune. The audience are entertained by both players, so it was equal" 02p4.

In their own words, the assistants and participants described Co-Active Leadership, saying:

> "Okay, so I see a duo, … two people making one unit together. … being two is more powerful than being one. Being two is more tolerant than being one." 05a2

> "It's like listening to music in stereo rather than mono. So, you've got two speakers, literally... (it brings) much better surround sound and you can hear every single detail. That's why people pay more money for surround sound speakers, rather than the average TV speakers. I think they're looking for better quality sound." 03p2

> "(It is like) when you are recording a 3D movie … there are two cameras looking more, or less from the same angle to the groups. So, they perceive more, or less the same way but slightly different. And by having the two images on top of each other, that's how the whole richness unfolds." 05p1

Operating as one, leaders were seen to complete and complement each other, both energetically and in what was being said. This sense that the two leaders fit together seamlessly and smoothly was prevalent in describing Co-Active Leadership. A great deal of trust was felt between the leaders. Trust in how they transparently and authentically brought their individual selves, (described later), trust also in how they interacted and engaged with the co-leader.

That each of the leaders finished the sentences of the other was one of the most common descriptors of this Single Leadership Entity as it provided a specific example of two leaders operating as one.

> "one speaks and then, it's the other one... And you're sort of having the
>
> same conversation as if it was one conversation but there are two
>
> voices." 01p3

As suggested by the Leader interviews, the emergence of this Single Leadership Entity is a result of the integration and combination of the other emergent themes. As Leaders bring their full authentic selves into the safe, non-judgemental relational environment with their Co-Leader, the two leaders are able to co-create from the contributions of each other while adjusting their actions based upon the emergent impact. As they respond positively to the contributions from each other, their 'dance' looks seamless and smooth. The interaction of Leaders in this manner, combined with a task alignment allowed the two co-leaders to come together in a way that allowed workshop participants to see and respond to them as if they were a single leadership entity. In this manner, the complexity of two leaders was simplified as they merged into a single entity which was then seen to lead the group.

3.2 The Impact of Co-Active Leadership

Given the rich data set, the Impact of Co-Active Leadership was explored in how it related to applying Co-Active Leadership in new contexts. To support this, a full exploration of the data relating to the Impact of Co-Active Leadership is omitted in preference for high level summary. Two views are presented, that described by Co-Active Leaders from inside the Co-Leadership dyad, and the outside view shared by participants and assistants.

3.2.1 Experience from The Inside, the Leader View

Interviews allowed data to be collected from Leaders describing their experience of Co-Active Leadership with it was working (ON) and when it wasn't (OFF). This contrast was useful to understand both states, as well as the difference between these.

Leader Experience when Co-Active Leadership was ON

At the highest level, Leaders described being part of the Co-Active Leadership synergy to be a 'Magical' experience providing them with great personal value. They referred to connecting with a spiritual element of Co-Active Leadership in how it allows people the opportunity to see and be who they are, without competition or contrast, and to experience acceptance in relationships with others who are doing the same. Being part of creating positive changes to people and relationships was seen by Leaders to be part of the magic of Co-Active Leadership.

Leaders enjoyed and appreciated the experience of Co-Active Leadership finding it to be fulfilling, joyful and fun. It is a place where they can be playful, and cheeky with each other and the room. Co-Active Leadership is characterised by flow and ease, where leaders do not have to be in their head thinking a lot, rather they are able to be present and feed off the emerging energy. To dance the dance.

> "When it's on, the words I'd use to describe that would be
>
> synchronicity, flow, ease, fun, playful, cheeky, we get away with lots.
>
> … It's like there is a magic that's created, there is a wow factor to it."
>
> LDR 1

Knowing that their Co-Leader had their back, they were unafraid to show up fully, authentically and with confidence. Leaders felt that this allowed a greater space to express themselves and while also providing a reassurance that it is OK to bring their full authentic self in service of the room. Leaders felt that this allows them to get away with a lot of things that perhaps would not be accepted in a less safe and permissive environment.

Co-Active Leadership means that Leaders are not alone, rather they are part of a team. This helps them to be mindful and attentive to what is happening, meaning they not only get the job done, but also to constantly build friendship. Building deep connection with their co-Leaders was described as a great benefit of Co-Active Leadership, while at the same time making the delivery both easier and deeper.

Leaders' experience of OFF when it was OFF

Leader experience of OFF Leadership was essentially the opposite of when it was ON. Instead of being characterised by positive emotion, flow, a deep connection, safety and full permission, OFF Leadership was described as frustrating, clunky, stressful, filled with tension and friction, exhausting, draining, and hard. In other words, "it doesn't feel great. … It feels like crap." (LDR 4).

As leaders found themselves in a dyad that was not leading co-actively, a series of reactions were recounted. These reactions included withdrawal, giving up, feelings of hesitancy or fear and 'going into their head.

> "The first couple of days of our co-lead I felt really stepped over.
>
> There were a lot of times where [my co-lead] cut me off and took
>
> over. I felt the participants saw the unbalance. It made me feel small
>
> therefore, I stepped back as a consequence. I didn't feel I want to
>
> participate because it felt I was "not" needed and it was hard work for
>
> me to step in and take space." 20160122 LDR 4

When Co-Active Leadership was OFF, Leaders described withdrawing from what was happening, going to their head and not showing up fully.

> "You show up smaller than who you are … you don't show up fully.
>
> You don't show up like who you are, authentically. …
>
> You kinda go into your shell. You're afraid to step up, or you give up
>
> and say, "Okay, screw it. I'm just gonna watch."…
>
> Withdraw. And then you're listening. You're not fully there. You're
>
> not fully present. … So, you're in your head more than you were out
>
> there." LDR 4

As described by LDR 4, when she felt her Co-Leader was stepping over her (a Leader Up behaviour), her reaction was to withdraw (a Leader Down behaviour). In essence, this reaction is an example of how both co-leaders interactions can reinforce, and amplify, the initial disconnection.

As can be imagined, this OFF environment was noticeably different to when Co-Active Leadership was ON. Rather than being characterised by flow, energy, connection, positive emotion and full authentic expression, Off Leadership was difficult, challenging as well as being physically, emotionally and cognitively exhausting.

> "When the relationship is not working, I reach the end of every day
>
> like dead, literally dead because I'm putting a lot of energy to on the
>
> wrong direction to make things work like trying to over engineer
>
> things." LDR 3

As will be seen shortly, the experience of Co-Active Leadership described by leaders from within the Co-Leadership dyad is very similar with that described by participants as recipients and witnesses to this dance. This is true for the positive and immersive effects when Co-Active Leadership is On, as well as well as the increased effort and exhausting nature when it is Off.

3.2.2 Impact of Co-Active Leadership From the Outside

When describing the impact of Co-Active Leadership, participants seemed to refer to multiple time points and multiple levels of impact. Participants referred to the initial impact, impact during the course, and the post course impact. Impact during the course was subsequently divided into two levels referring to the impact on individuals and on the group climate.

Having not experienced this type of leadership before, Participants were both surprised and curious as to how it would work. In thinking about similar experiences where two leaders interacted, they tended to give examples of a primary and secondary leader, leader rotation, or of emergent politics and conflict between organisational leaders, and were expecting this from the co-leaders.

One participant described his initial experience:

> "I've never come across co-active leadership ever, and I've never
>
> heard of it, either. … I was a bit worried, when seeing there were two
>
> leaders in front of me in the beginning …

> Because, I mean, the idea of leadership is usually... Or I would see it
>
> as being one leader and maybe a co... Like you have a captain and a
>
> co-captain, it's never two captains on the airplane … So, having two
>
> people was a little bit worrying for me, in a sense, "Okay, so how are
>
> they going to manage to work together in synergy, without
>
> overlapping egos ... "" 03p2

This sense of worry regarding shared leadership was not unfounded given participants history with leadership sharing. Additionally, having the opportunity to explore Co-Active Leadership when it was not working, (i.e. OFF) showed how similar this was to the previous ineffective attempts at 'leadership sharing' experienced by participants.

When it was working, participants described a safe and immersive environment that allowed them to be fully present with what was happening. Having two leaders, allowed participants to connect with the single leadership entity through either or both leaders. As long as the leaders were connected to each other, then a participant connected to one leader, was also connected to the dyad. Participants described feeling connected to the leaders, even if they didn't "like" one of them.

> "And when you see people play co-actively, ... they're able to provide
>
> an experience that is far more than just the content. They're able to
>
> provide their energies to the content. They're able to provide their
>
> perspectives to the content. And sometimes one content that's being
>
> led by one facilitator or one leader may have a different flavour for the
>
> other and it's really nice to hear that, see that, experience that, 'cause it
>
> creates a real perspective. That's something that's really quite amazing

about co-active leadership in the front of the room. The perspective is

much wider than if you're just working with one person." 04p1

In this immersive and connected environment, participants described a sense of safety and

trust, allowing them to be emotionally open and engaged with what was happening. The

authenticity and vulnerability of the leaders allowed participants to do the same, sharing parts

of themselves they normally kept hidden. At the individual level, this reflected the

willingness of participants to connect with these topics, and to be less judgemental of

themselves. As well as being able to express their own emotion, participants were better able

to be with the emotional expression of others.

"I shared with the leaders and with the room things that I don't share

with people whom I don't know in general, or I haven't known for a

while. Observing them (Leaders) working together, once again gave

me a deep feeling of peace and trust. And I learned that this is a very

important condition in that the personality and the openness of the

leaders is really, really key. ... I didn't feel at all embarrassed sharing

anything that would be undermining to share in a different context."

05p2

Post course impact was best described as a redefinition of leadership and an intention and

motivation to apply a Co-Active style of Leadership in other areas of participant's lives.

Having experienced Co-Active Leadership, participants reported that their understanding of

leadership had changed. This change referred to a shift from a single hierarchical leader to

leadership that was more relationally interdependent. The experience of Co-Active

Leadership helped participants to see how two leaders at the same hierarchical level could

trust each other enough to collaborate and respond in a connected, aligned and supportive manner.

> "Like I said, I've never experienced this approach … I mean, the
> concept of leadership has changed. …
> It's transformational. Because the old-school leadership styles,
> regardless whatever type it may be, transactional, transformational,
> dictatorship, whatever it is ... This is different. And it's a good
> different. I honestly feel it's a good different." 03p2

Inspired by their experience, participants saw that this style of leadership had relevance in all areas of life, education and business settings.

> "I think (this can be applied) everywhere where the purpose is to aim
> for empowerment, creativity, ownership. In all circumstances this
> would have a great impact." 05p1

Looking toward expected results, participant expected that the application of a Co-Active style of Leadership would result in significant increases in business understanding, performance, productivity and business revenues.

> "I believe if we all worked for the benefit and the best of the work
> environment, we would achieve so much more. I believe if we
> stopped competing with each other, although we work on different
> managerial levels, I think we would achieve so much more. … I think
> all the employees would be more productive with this kind of
> leadership." 01p1

Though participants were also clear to explain that while they thought this style of leadership would bring great benefits, there were also challenges to its application, particularly in existing organisations.

> "How can something like this work in a corporate environment? This is the first thing that comes to my mind, and I'm linking it to having two leaders working in corporate and ultimately, their goal is promotion, recognition, etcetera. So, someone has to outperform the other person. Whereas, co-activeness, in the way I see it, is really "Co." It's us, it's togetherness, it's all for one, one for all, type of approach." 03p2

These barriers and this description of what happens in the 'corporate environment', highlighted the importance of better understanding Co-Active Leadership when it was not working.

3.2.2.1 Contrasting Co-Active Leadership to the experience when it was OFF

The richness of the safe, connected and immersive experience of Co-Active Leadership became clearer when contrasted to the experience when it was not working. In these examples of OFF Leadership, participants did not feel safe and withdrew from being immersed in what was happening, taking a more critical observer role where they began to evaluate and assess what was happening from a distance. Cognitively active, participants selected a preferred leader, one with whom they felt more connected or safe, and through this preferred leader, they would assess the contributions of the other. This meant that participants' reactions to the non-preferred leader was conditional upon, and aligned with, the response of the preferred leader. This critical observer role created cognitive and emotional distance between the participant and what was happening, leading them to selectively engage

with what was happening in terms of when, how and what to contribute and required a great

deal of energy making it an exhausting experience.

> "I think it's kind of a sword with two edges. And if you don't do it
>
> correctly, it will kind of bite you in the back, because ... if you have a
>
> single leader and he is bad, the course goes bad. But if you have a bad
>
> co-active... Two people that are not compatible ... This will double the
>
> negativity …
>
> that negatively impacts the participants." **04p2**

> "When the leaders are in such harmony, things are very clear, actually.
>
> When they're not, I kinda get lost on the way. So, that's like … I'm
>
> going one direction and then suddenly, I have to go the other because
>
> the other leader is going a different direction" **02p2**

> "when there's no harmony, you have to press the think button every
>
> now and then. And when you press the think button, you are actually
>
> going out of that (immersive experience) and (having to exert effort to
>
> press) the button to put yourself back in that space." **02p4**

As described earlier, the single leadership entity and Co-Active Leadership were seen to

breakdown when the two connected and aligned leaders stopped operating as a single entity

and separated into two independent leaders. Participants found it difficult, if not impossible,

to simultaneously follow two individual leaders. As the disconnection progressed, it led to

increased participant withdrawal as they distanced themselves from what was happening,

increased cognitive effort to follow what was happening and then decision making to

determine how best to reconnect and engage with the situation. All of these additional steps

led to the experience of OFF Leadership being emotionally and cognitively exhausting, less

safe and less rich. A significantly different experience from when Co-Active Leadership was ON.

3.3 Developing Co-Active Leadership

The third research question explored how interviewee perceptions of how Co-Active Leadership could be developed. The research design allowed the exploration of how development appeared from the multiple perspectives of Leaders, Participants and Assistants. These perspectives provided insight into how each group felt that they could develop as Co-Active Leaders. These differences were seen most clearly in the specificity shared by participants (i.e. goals and objectives), contrasted to the generality presented by Co-Leaders (i.e. to look deeper in the models).

Overall, the description of Co-Active Leadership Development pointed to a distinction between what the Co-Leaders were doing, and who they were being.

- Being of Co-Active Leader
- Doing of Co-Active Leader

In this sense, this emergent model aligned with the description of Co-Active Leadership where the 'Doing' referred to behaviours and actions of Co-Leaders while the 'Being' referred more to an internal state or mindset at a deeper level that influence the Leaders' relationship with themselves and their colleague.

Things leaders were seen to be able to do to enhance Co-Active Leadership included gaining more experience, getting better at how to intentionally design the Co-Leader relationship, providing feedback to self and each other, as well as being able to clearly identify and align on goals and objectives of both the course, and the importance of Co-Active Leadership.

> "I wanna know about designing the understanding in between the two
>
> and how is it gonna work like, how to design this understanding and
>
> have both of them working on the same level." 02p3

The Being of Co-Active Leadership pointed leaders to their mindset, and how this influenced a Leader's relationship with themselves and with their Co-Leader. As a Leader, interviews pointed to the importance of this mindset in helping leaders to bring their full selves, and to facilitate the connection with colleagues. This mindset and connection can then positively influence how Leaders perceive, interpret and respond to emergent differences or changes during the lead. Leaders also identified a desire to look deeper into the models of CTI and how to be more connected and committed to being Co-Active.

> "it's not just about the do, because the do is, "Okay go sit in the front
>
> of the room with somebody else.""
>
> I mean technically that's co-active leadership. But that's the active
>
> piece.
>
> The being piece I think is much harder to articulate and some use it
>
> like a metaphor, it's like the doing of turning on the light switch is
>
> flicking the switch; it's touching the switch and flicking it on. The
>
> being of that … is all of the stuff that's going on in the background to
>
> make it happen. There's all of that energy flow(ing). … there's
>
> constant energy transfer going through that switch to the light-bulb to
>
> create light, I mean that's what happens with the co-active dance at the
>
> front of the room. There's just constant energy flow that is happening
>
> between the two leaders. And that's unseen, it's felt like you can feel
>
> their electricity, you can feel the energy, but you can't see it. And I

think that's what makes it so magical, but also what's hard to articulate

about it at the same time." LDR 1

3.4 Conclusion of the Data Analysis Chapter

Throughout this chapter, the analysis of interviews with participants, assistants and leaders has been presented to shed some light on the three research questions and how they relate to applying Co-Active Leadership in new contexts:

1. How do people experience Co-Active Leadership?
2. How do people describe their experience of being impacted by it?
3. How can Co-Active Leaders enhance participant experience of co-active leadership to increase its positive impact?

Overall, having explored the perspectives of three different groups involved with Co-Active Leadership, there was a great deal of similarity and alignment in what was described. The different perspectives of each group were also seen in how and what they described in the interviews, specifically:

o Participants, immersed in their experience of Co-Active Leadership, some for the first time, provided rich experiential descriptions of when it was working, and when it was not.
o Assistants, in their role of observers, were able to fill in some descriptive gaps as they tended to hold their interview focus upon what the leaders were doing.
o Leaders were sharing their insight from within the Co-Leadership dyad, shared more insight into the being of Co-Active Leadership, and their experience when it was working and when it was not.

As a larger group, it was clear that Participants, Assistants and Leaders all saw that Co-Active Leadership was more than just the tasks or behaviours performed by the Leaders. It was also important that these tasks and behaviours were expressed in relational connection, with each other. This relational component and the environmental safety it provided at

individual and the group levels, was seen to be key to the amazing, powerful and transformational nature of Co-Active Leadership.

Additional themes emerged from the interviews, providing greater insight into the primary research questions. These specifically related to the exploration of Co-Active Leadership when it was not working (OFF Leadership) and where participants saw Co-Active Leadership being applied beyond the workshop environment. The exploration of OFF Leadership shed light onto some of the risks and challenges of Co-Active Leadership, and that this is not a binary function, rather it scales as to how connected the leaders are, as well as the insight as to what impacts its success.

The next chapter will continue to examine and integrate the findings presented in this chapter. Specifically, it will discuss in more depth the primary research themes of Co-Active Leadership when it is working, as well as the it is not (OFF Leadership). The discussion will further synthesise the data in such a way that it can be linked back to the current body of literature on shared leadership.

Chapter 4: Discussion

This chapter extends upon the Data Analysis Chapter with further exploration of the insights gained from the interviews, drawing out the essence of Co-Active Leadership. The application of these insights will be outlined in the Action Chapter. While this approach provides some separation of the two research forms, it does allow a greater clarity of data sources which is especially important given the differing epistemological views of phenomenology, where I sought to 'bracket' my own experience (Creswell, 2013; Smith et al., 2009), and the action research where I sought to apply it (i.e. Coghlan, 2001; Dick and Greenwood, 2015; Greenwood and Levin, 2007; Harris, 2008).

This chapter begins to integrate the data presented in the previous chapter with extant literature with a particular focus on moving towards greater understanding of how to apply Co-Active Leadership in new contexts beyond the CTI Classroom. The structure of this chapter follows the key research questions as they relate to applying Co-Active Leadership in other settings. Beginning with a brief overview of how people describe their experience of being impacted by Co-Active Leadership, it moves on to explore how people experienced it. Finally, it touches upon how interview data connects directly to the development of Co-Active Leaders before transitioning to the Action Chapter.

4.1 The Impact of Co-Active Leadership

Literature on Shared leadership speaks to both positive and negative outcomes from leadership sharing (i.e. D'Innocenzo et al., 2014; Reid and Karambayya, 2009; 2015; Ulhøi and Müller, 2014; Wang et al., 2014). By seeking to understand and describe Co-Active Leadership, this study was able to shed some light into the impact of Co-Active Leadership when it was, and when it wasn't working, as well as the dynamics involved. While much of the research on the Impact of Co-Active Leadership is beyond the scope of this current

dissertation, it remains important to present an overview of the impact as it directly speaks to why one would even want to consider applying this form of leadership

When it was working, Co-Active Leadership was seen to positively effect multiple levels of the complex dynamic space, impacting the individual, dyadic and collective levels in both direct and emergent ways. These effects began from the first moment participant's saw the two leaders at the front of the room, progressed throughout their experience of Co-Active Leadership and persisted beyond completion of the workshops. Overall, participants, and assistants had a similar experience on the outside to what the Leaders had from inside the leadership dyad.

Overall, the experience was described as immersive, rich and flowing, as participants (and leaders) described an experience similar to team flow (Aubé et al., 2017). From a relational perspective, participants described themes related to psychological safety (Nembhard and Edmondson, 2012) and high quality relationships (Dutton and Heaphy, 2003; Stephens et al., 2012) both of which gave permission for greater authenticity (Hughes, 2005), vulnerability and humility (Owens and Hekman, 2016). From a task perspective, participants reported a stable and engaging energy across the three-day workshops (Bacharach et al., 2010; Roth et al., 1999; Stephens et al., 2012). Combining with the interaction of multiple leader perspectives and styles, this helped participants to experience a diversity (Bergman et al., 2012) and variety (Jones and Harris, 2012) of leadership behaviours. As such, the experience of participants was seen to be more " 'rich' in knowledge, perspectives and experiences" as leaders were able to model more complex levels of learning, interaction and critical thought (Baeten and Simons, 2016; Carpenter II et al., 2007, p. 55; Cohen and DeLois, 2002; Fall and Menendez, 2002).

The type and range of impacts created by Co-Active Leadership align with, and support those described in the literature, connecting the diverse research areas of shared forms of leadership, co-teaching, and co-therapeutic interventions, as well as research into positive relationships and group and team dynamics. This overlap supports the view that co-leadership in this form is not limited to the Coach Training classroom, and thus has relevance and potential application to wider organisational, therapeutic and teaching contexts, including leadership development. More than this, it also shows how classroom co-facilitation can be viewed as an example of shared leadership.

4.1.1 (Re)Defining Leadership

When first exposed to Co-Active Leadership, participants were initially disoriented, as the initial experience did not match their implicit theories of leadership which tended to relate to traditional experiences of organisational leaders (Crevani et al., 2007; DeRue, 2011; Fletcher, 2003; Wang et al., 2014; Wood, 2005). These hierarchical experiences of leadership had included times when two leaders had been present, though under these circumstances, leaders often reverted to political or competitive, rather than the collaborative and co-creative behaviours that emerge from Co-Active Leadership. Interestingly, these past experiences unsuccessful leadership sharing parallel the description of Co-Active Leadership when it is OFF, characterised by vertical (hierarchical) and horizontal (mis-aligned) separation, or a focus on self (ego), described later in this chapter. This redefinition of leadership and leader identity are seen as integral in supporting the development of new Co-Active Leaders, as descried later in this chapter.

Having witnessed successful Co-Active Leadership as an experience that did not fit with initial implicit leadership theories, participants described redefining their understanding of leadership. As a concept, definitions of leadership evolved to be more collaborative, authentic

and emergent (Crevani et al., 2007; DeRue, 2011; Kennedy et al., 2013; Yammarino et al., 2008).

From a Leader and Leadership Development perspective, this definitional impact on participants suggests that experiencing shared leadership may be an important step in changing implicit models, and in providing successful role models of leadership sharing. This provides potential solution to the paradox of leadership described by Fletcher and Käufer (2003) where leaders are being asked to redefine the image of self, as well as transforming languages of leadership, leadership development, and power, and to do so in ways that are contrary to their own experiences, and to the style of leadership that has helped them attain their current positions. In this sense, experiencing successful examples of shared leadership could, in themselves, support the development of shared leadership.

4.1.2 Experiencing Co-Active Leadership from the Inside – The Leader Experience

This study provides support to the extant literature on both leader and teacher experience within a co-leading environment. Identified benefits have included personal development, greater colleague collaboration, ability to take greater risks, diversity of leader roles, feelings of safety as other leader can provide support, increased ability to work with group complexity, role modelling of appropriate behaviours, and Co-Leadership as a tool to develop new leaders (i.e. Bryant et al., 2014; Fall and Menendez, 2002; Roth and Tobin, 2004).

What has clearly emerged from this rich exploration is that Leaders experience leading Co-Active Leadership in a similar way to how participants experience their leadership of it. For both groups, this was a positive and rich experience characterised by fun, ease, flow, connection, and a great deal of permission. As such, this study has connected Co-Active Leadership as a form of shared leadership with the emergence of dyadic and group level emergent states such as psychological safety (Edmondson, 1999), trust (Drescher et al., 2014)

and constructs related to positive or high-quality relationships and connection (Dutton and

Heaphy, 2003; Fletcher and Käufer, 2003; Roberts, 2007).

Leaders also expressed the emotional experience of Co-Active Leadership as being filled

with joy, fulfilment, fun, and containing a sense of playfulness and cheekiness. They

explained that by having someone 'at their back', they were able to bring more of their range,

experiencing a greater sense of permissiveness and freedom within the relationship with their

co-leader, and with participants. While the ability of multiple leaders to provide 'back-up

behaviours' has been documented elsewhere (i.e. Dust and Ziegert, 2015; Salas et al., 2009b),

what has emerged from this study is evidence of the safety and permission leaders felt and the

impact this had on their willingness to be more authentic as leaders. This reflects a dyadic or

relational connection to the expression of authentic leadership at the individual level, and the

benefit of shared leadership in facilitating its emergence (Algera and Lips-Wiersma, 2012;

Gardner et al., 2005a; Ilies et al., 2005; Yagil and Medler-Liraz, 2014). Greater authenticity,

combined with the permissive relationship also enabled leaders to take more risks in service

of the shared purpose, knowing that if they got 'hooked' that their co-leader was there to

facilitate and support a recovery for both the leader, and the larger group (Fall and Menendez,

2002).

What we have seen is the 'ease and flow' that leaders describe as part of Co-Active

Leadership. This is in direct contrast to some of the literature pointing to increased costs of

leadership sharing, specifically "costs such as increased coordination and communication"

(Dust and Ziegert, 2012, p. 422). Specifically, this research supports the view that

implementing co-leadership is more complex than can be explained with linear statements,

and that Co-Active Leadership provides an example of a very specific example of co-leading

where, when it works, there is greater ease and flow, rather than the anticipated increased

coordination costs (i.e. Dust and Ziegert, 2012; Friend, 2008). This is not a dismissal of

increased costs associated with leadership sharing, for these were clearly seen when Co-Active Leadership was OFF, rather it is an articulation that when connected, two leaders coming together as one can increase the energy available to leaders creating an experience of flow and richness for leaders and participants alike. In fact, this research also brings greater clarity to the dynamics of when the Co-Active Leadership is ON, and when it is OFF. These dynamics are discussed later in this chapter in relation to both Co-Leaders and participants.

4.2 How do people Describe Co-Active Leadership?

When it works, Co-Active Leadership can be described as an incredibly powerful and rich experience for both leaders and participants. The positive impact of Co-Active Leadership is seen to emerge from the coming together of two leaders, completing and complementing each other. Coming together in this way, the boundaries between the two leaders appear to soften or blur as they combine to be seen as a single leadership entity. Operating as one, they finish each other's sentences, building from the contributions of the other whilst bringing their unique range and perspectives to help deepen connection and learning. The two leaders are seen to dance and flow together (Hogan, 2005; Knight and Scott, 1997; Roth and Tobin, 2002; 2004) in ways that are seamless and harmonious. In line with other perspectives on leadership, observers saw and described the importance of the behaviours of, and the relationship between, the Co-Leaders (i.e. Avolio et al., 2009; Carson et al., 2007).

The seamless, concurrent co-enactment of the leadership role by two leaders, involves leaders coming together in a way that they convey a single message shared through two distinct voices. In doing so, Leaders are willing and able to both lead and follow the other (Carson et al., 2007; Chiu et al., 2016; DeRue and Ashford, 2010; Drescher et al., 2014), while also being aligned around purpose (as created during design, and in alignment with the course timeline) and what is emerging in the room. This gives permission for leaders to co-generate ideas and actions as they create with what is emerging in the room. This co-generation is

facilitated by two roles, in that one is actively speaking, and the other observing what is happening, able to leverage the time and space to attend to details as they emerge in the room to adapt messaging to enhance the connection, learning or engagement of participants (Roth and Tobin, 2004).

4.3 Emergent Dynamics of Co-Active Leadership

Co-Active Leadership is a specific form of pooled leadership (Denis et al., 2012/2015) consisting of two leaders concurrently co-enacting the leadership role, in a form that is concurrently dual-comprehensive (Dust and Ziegert, 2015). The fact that leaders concurrently co-enact the role makes it different from rotational forms (Contractor et al., 2012), where the entire role is fully shared, yet individually enacted at any single point in time. This positions Co-Active Leadership as an example of the most concurrently collaborative form of team teaching (Cook and Friend, 1995). More than this, however, describing Co-Active Leadership has underscored the relationally constructed nature of leadership that is influenced by, and emergent at multiple levels. Specifically, the emergent descriptive model highlighted the interaction between:

- Commitment to Co-Active Leadership
- Individual Leaders
- Leader Design
- Leader Behaviours
- Co-Leader Relationship
- Co-Leader Reflective Feedback

And how each of these levels support the emergence of the Single Leadership Entity.

The descriptive model of Co-Active Leadership encapsulates the coming together of the co-leaders across multiple levels and shows the interaction, and concurrent expression, of these levels. Importantly, this study highlighted the centrality of co-leader connection and the co-

leader relationship and its impact in supporting individual leaders to powerfully impact the group from the dyadic level. The exploration of OFF Leadership showed that the dissolution of the leadership dyad led to the dissolution of Co-Active Leadership. More than this, it suggested a separation of leadership levels as a focus upon the individual (hierarchical or Ego) inhibited the single leadership entity.

These levels reflect individual, dyadic, and group levels and are consistent with the research into multiple levels of analysis and leadership loci (i.e. Hernandez et al., 2011; Kozlowski and Chao, 2012; Kozlowski et al., 2013; Kozlowski and Klein, 2000). This description of Co-Active Leadership also bridges all loci presented by Hernandez et al. (2011), positioning leadership as a quality of individual, dyadic and collective levels that is impacted by both context and followers. Importantly, this model reflects the integration and concurrency of these multiple levels and loci, reflective of a dynamic, complex, and emergent system (Kozlowski and Chao, 2012; Kozlowski et al., 2013; Kozlowski et al., 2009). These levels are also important in understanding the multiple levels of co-leader action (and relationship) that were important for the emergence of the single leadership entity.

Specifically:

1. Individual
   o Commit to Co-Active
   o Individual Leaders(s)
2. Relationship
   o Leader Design
3. Dynamics
   o Co-Leader relationship (Teamwork)
   o Co-Leader Behaviour (Dynamics)
   o Reflective Feedback
4. Emergence
   o Single Leadership Entity

From a levels of analysis perspective, the descriptive model highlights the interaction of three components in supporting the emergence of the single leadership entity, namely the individual leader, the co-leader relationship and the leadership dynamics as shown in Figure 1.
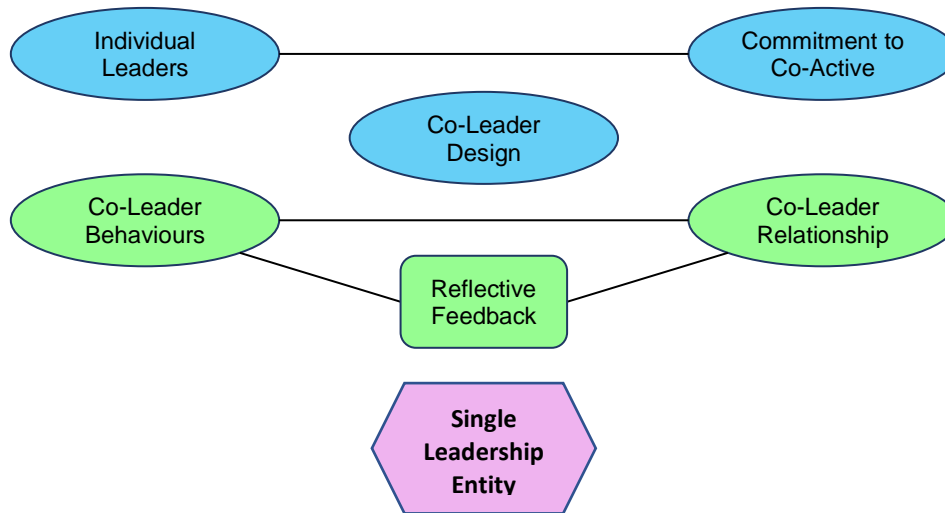
Figure 1: Visual representation of the emergent model describing Co-Active Leadership

4.3.1 Individual Level

At the individual level, the descriptive model points to two areas important for the emergence of Co-Active Leadership. The first is related to a leader's commitment to leadership sharing, and the second to their mindset around leadership.

4.3.1.1 Commitment

This first layer, of commitment to co-active leadership is a simple, yet important step. It relates to the decision and commitment of leader(s) to lead in a manner that is concurrently active. It might seem like a subtle point, yet Co-Active Leadership is unlikely to occur by accident. As this study has shown in the exploration of OFF Leadership, even when leaders have been committed to Co-Active Leadership there are times when it still does not work. This suggests that commitment is a necessary, but insufficient condition for the emergence of

Co-Active Leadership. This commitment is connected to the mindset of the leaders as commitment is prefaced upon, both being aware that co-active leadership can successfully exist, and in having the willingness to enact it.

4.3.1.2 Individual Leaders

In order to Co-Lead, individual leaders require both a mindset of Co-Leadership, and the willingness and ability to be Authentic.

Mindset of Co-Leadership

As a form of shared leadership, Co-Active Leadership does not fit within traditional definitions of Leaders or Leadership and so requires a new operating definition, or mindset (Crevani et al., 2007; DeRue, 2011; Kennedy et al., 2013; Yammarino et al., 2008). It requires a view of leadership defined by complex, interdependent and collaborative interactions to facilitate the emergence of the single leadership entity. It requires a co-creative approach to collaboration where individuals can bring their voice and, simultaneously, allow the voice of their colleague as, together, they co-create leadership (Carson et al., 2007; DeRue, 2011; Jordan, 2004b). This willingness to step into the unknown complexity of co-creation, without attempt to control the other, is essential for leaders once we start to look at the relational dynamics of co-leadership seen through the rapid and dynamic transitions essential to the concurrent enactment of co-leadership within the Single Leadership Entity. From a definitional perspective, this form of leadership must be congruent with existing (implicit) definitions of leadership and individual leadership identity (DeRue and Ashford, 2010; Kennedy et al., 2013).

Leaders must be willing to interpret the contributions and interruptions of their colleague as positive and supportive, rather than as threatening – as contributions of **US**, rather than a correction of **self**. As the exploration of OFF leadership identified, a reduction of leadership concepts from the collective (dyad) to the individual can lead to hierarchical and power

positioning relative to the co-leader, or a focus on Self, both of which led to co-leader disconnection (Drescher et al., 2014; Jordan, 2004b).

Willing and Able to bring Humility and Authenticity

In essence, this willingness to receive the contributions of others reflects leader humility. Owens et al. (2013, p. 1518) "define expressed humility as an interpersonal characteristic that emerges in social contexts that connotes (a) a manifested willingness to view oneself accurately, (b) a displayed appreciation of others' strengths and contributions, and (c) teachability". In the context of shared leadership, teachability is connected with a greater openness to receive feedback and contribution from co-leaders, as well as influencing the relationship between behaviours or leadership claiming and granting (i.e. the leadership transitions) (Chiu et al., 2016; DeRue and Ashford, 2010; Nielsen et al., 2010). Furthermore, the humility of individual leaders is linked to both social humility as a team level emergent state, and increased team performance (Owens and Hekman, 2012; 2016). In terms of the descriptive model, these behaviours were described as leaders being real, authentic and vulnerable, being role models and willing to grow. Descriptions of Co-Active Leadership also include the willingness of leaders to be different and to bring their own unique perspectives, connected to the willingness of humble leaders to identify and own both their strengths and weaknesses.

Owning their strengths and weaknesses is linked to self-awareness, a construct of Authenticity (Gardner et al., 2005a). Authenticity was also a term emergent from participant interviews when describing the willingness of leaders to bring their full selves.

Authentic Leadership, in this sense, is a "commitment to one's identity and values", defined by four underlying components consisting of self-awareness, balanced information processing, authentic behaviour, and relational transparency (Chan et al., 2005, p. 8; Diddams and Chang, 2012; Gardner et al., 2005a; Gardner et al., 2011; Yagil and Medler-Liraz, 2014).

These are related to expressing the full range of the authentic self, and to building transparent and trusting relationships with others (Hughes, 2005).

In the space of Co-Active Leadership, the openness of a leader is related to their willingness and ability to listen to, and thus, allow the contributions of their colleague. Providing space and permission for their contributions to be included in what is co-created by the leadership dyad. Without a willingness to be open, there can be no leadership sharing. With openness, the leader-follower dyad has the opportunity to become bidirectional. Expressions of authenticity and humility, are unsurprisingly linked to relational intimacy (Aron et al., 2004/2013; Huffman and Fernando, 2012), and to increases in leader-follower trust, psychological safety and connection (i.e. Avolio et al., 2004; Gardner et al., 2005b; Hughes, 2005).

At the individual level, the willingness and ability of a leader to express humility and authenticity is an important step in both bringing their full self, and in allowing the authentic contribution of their colleague (Chiu et al., 2016; DeRue and Ashford, 2010; Nielsen et al., 2010; Owens and Hekman, 2012; 2016).

4.3.2 Designing the relationship

With a commitment to Co-Active Leadership and a mindset that allows it, individual leaders can come together to build a connected relationship with their colleague. At the relational level, Leaders connected with each other, aligning on both task and relationship to set the foundation for a high-quality relationship and positive relational climate. This level is distinct from the level of leadership dynamics as it provides the foundation for the relationship and interaction of Co-Active leaders as dynamically enacted and maintained at the higher level. This foundation also provides a connection to the individual level as a safe relational space supports each individual leader in bringing their full and authentic self into the relationship

(Aron et al., 2004/2013; Chiu et al., 2016; DeRue, 2011; DeRue and Ashford, 2010; Huffman and Fernando, 2012; Jordan, 2004b).

At this, relational level, Co-Leaders began to align on the goals and objectives of their work together, to create connection and to create an openness to the giving and receipt of feedback to support the ongoing evolution of the relationship. From the field of group dynamics, this reflects the emergence or creation of team mental models for both task and relationship (Kozlowski et al., 2009; Salas et al., 2009b; Zaccaro et al., 2001) while also creating the relational platform to allow for the full and authentic expression of each leader.

Leader design has been identified as an essential step to occur prior to co-leaders beginning to co-lead, as the development of this Co-Leader relationship is seen to impact group development (Dugo and Beck, 1997; Okech and Kline, 2006; Wheelan, 1997). From a task perspective, Co-Active Leadership is unique from other examples in the literature in that the task is already designed. This is unlike co-teaching or group therapy where the co-leadership role begins with the identification and alignment of vision and the subsequent creation of teaching or therapeutic approaches (Clark et al., 2016; Fall and Menendez, 2002; Fall and Wejnert, 2005; Kamens et al., 2013; Okech and Kline, 2006; Pancsofar and Petroff, 2013; Pugach and Winn, 2011). Though even without having to design the task, Co-Active Leaders still need to align on their understanding of the task, definitions of success and personalised approaches to achieving these outcomes. The descriptive model points to the importance of aligning on purpose, underlying models, and in creating the space for shared responsibility for team outcomes. This provides the platform for effective teamwork and can include components related to team leadership, adaptability, performance monitoring, back up behaviours and maintaining a team orientation (Dust and Ziegert, 2012; Salas et al., 2009b).

This Co-Leader design is important for the intentional and deliberate creation of an inter-individual space that is primed for high-quality relational environment. Leaders identified seeking to design flow, ease, joy, fun and energy contained within a space of permission and safety. This intentional relational experience designed by co-leaders mirrors the components of connection, also known as the "five good things" (Comstock et al., 2008; Fletcher, 2003; Fletcher and Käufer, 2003). These include feelings by each person of zest or energy; greater willingness and capability to act; more accurate picture of self and other; greater sense of worth; and a feeling of greater connection with the other combined with a motivation for more connection in general (Comstock et al., 2008). In seeking to create these five good things, the Leader Design conversation seems to involve what Jordan (2004b) describes as relational awareness, to attend to self, the other and the relationship; and relational competence to effect relational change in this direction.

Relational competence involves mutual empathy characterised by bidirectional caring and learning between people, anticipating and caring about the impact on others, willing to be influenced, bringing curiosity into the relationship, holding vulnerability as inevitable and that this is an opportunity for growth, and creating good connection (Jordan, 2004b).

These high-quality relationships are characterised by three defining characteristics (Dutton and Heaphy, 2003). They have a "higher emotional carrying capacity" supporting the open expression of both positive and negative emotions, "tensility" which relates to the degree of resilience in the bond and its ability to withstand challenge, and finally, "the degree of connectivity" which refers to a "relationship's generativity and openness to new ideas and influences" (Dutton and Heaphy, 2003, p. 266).

Team research supports team level emergent states created through the expression of individual characteristics and relational dynamics (Chiu et al., 2016; Marks et al., 2001).

These emergent states include psychological safety (Edmondson, 1999), Trust (Avolio et al., 2004), intimacy (Aron et al., 2004/2013; Huffman and Fernando, 2012), and flow (Aubé et al., 2017; Heyne et al., 2011; Hooker and Csikszentmihalyi, 2003). Importantly, the emergence of these states is not left to chance, rather this study showed leaders actively designing their dyadic relationship to create, or nurture the emergence of, these positive states.

At this relational level, the focus is upon the alignment and connection of the co-leaders, in how they create the foundations for a powerful, and connected relationship which provides the safety and permission for each of them to bring their full authentic selves into the leadership role (Algera and Lips-Wiersma, 2012; Avolio and Gardner, 2005; Gardner and Schermerhorn Jr, 2004; Ilies et al., 2005; Yammarino et al., 2008). More than this, such a high-quality connection begins to create the relational safety and tensility for leaders to confidently bring diverse perspectives or behaviours in service of the lead, without fear of judgement or disconnection (Dutton and Heaphy, 2003; Stephens et al., 2012). The dynamic interactions of these behavioural and relational actions are described next.

These characteristics have direct connection to the triggers emerging from OFF Leadership, where hierarchy and ego both impact the willingness to be influenced by or attend to the other, or the excise of power over the other, each leading to relational disconnection.

4.3.3 Dynamics of Co-Leadership

At the level of the leadership dynamics, the descriptive model identified co-leader relationship and behaviours as well as the importance of regular reflective feedback conversations in supporting the emergence of the Single Leadership Entity. As seen in the previous, relational level, this supportive, permissive and connected relationship begins at the individual level, and the relational foundation is then built through Leader Design. At the

level of dynamics, observers identified, not the establishment, but the maintenance of relational equality, alignment and coordination between leaders, and saw a willingness for leaders to bring harmony and non-judgement to create tolerance and acceptance of each other. This is the level where co-leaders enact the teamwork of leadership.

Behaviourally, leaders expressed authenticity and humility as they brought their individual range to support a greater expression of dyadic range within the leadership role. The increased attention to, and awareness of, what was emerging in the room (for individuals and the group) enabled leaders to co-create from each other.

From the perspective of dynamics, the interaction of the co-leader relationship to allow and positively reinforce these behaviours, combined with the subsequent reactions from the initial leader leads to a multi-layered interactive 'dance'. DeRue and Ashford (2010) described the enactment of such leadership dynamics as related to the claiming and granting of leadership identity. In this setting, one member of a team will make a claim (i.e. voice a contribution or engage in a leadership behaviour) which, if it is to be sustained, needs to be granted by 'followers.' In this manner a claim is granted by followers choosing to follow. Looking at the dynamic and rapid leadership transitions through this lens, an observer would bring their voice (Carson et al., 2007), making a leadership claim. When Co-Active Leadership is ON, this claim would be granted by the active leader as they stop speaking and transition into the 'follower/observer role' until they then make their next claim. In this sense, Co-Active Leadership reflects a bi-directional leader follower relationship, with rapid and permissive transitions. Here lies a difference between Co-Active styles and other forms of shared leadership (i.e. rotational, or role allocation), in that the transitions between leaders are rapid and fluid; emergent in nature, rather than pre-planned and formal. Leadership dynamics combines the behaviours of these transitions with the relational permission and acceptance of

the expression of transition behaviours, thus allowing the emergence of the Single Leadership Entity.

Participant and Leader descriptions of Co-Active Leadership show how shared leadership emerges through the interaction of a willingness for leaders to contribute (voice) and subsequent leader responses, either granting leadership sharing through a willingness to follow, or reinforcing the self as THE leader. Exploration of OFF leadership showed that declining leadership claims led to the perception of vertical separation in the co-leader relationship. This vertical separation was seen to occur when leaders were unbalanced in their willingness to lead (i.e. voice their contribution) or to follow (grant leadership claims of the other). At this level, Co-Active Leadership connects with theories relating to dialogue and leadership-as-practice whereby leadership is a relationally enacted construct (Crevani et al., 2007; 2010; Fletcher, 2004; Raelin, 2016; Vine et al., 2008).

As can be seen, the creation of high-quality relationship and positive emergent dyadic states provide the safe and connected foundation from which leaders can express authenticity and humility to begin to co-create these leadership dynamics. This relational environment provides safety for Leaders to be willing to listen to their colleague, allow themselves to be influenced, as well as to freely contribute to the co-creation (Chiu et al., 2016; Fall and Menendez, 2002; Gardner et al., 2005a; Owens et al., 2013; Stephens et al., 2012). Carson et al. (2007, p. 1222) described the importance of this willingness, outlining that for shared leadership to emerge, team members must be willing to offer leadership, and be "willing to rely on leadership from … [other] members". Moving this to the individual level, each leader, must be willing to offer leadership, and grant leadership claims from their co-leader (Carson et al.; DeRue and Ashford, 2010). This is a significant shift from traditional, hierarchical forms of leadership where "power-over" is common. Co-Active Leadership reflects a

relationship of mutuality and power "with", to empower both parties to lead and follow (Fletcher and Käufer, 2003; Follett, 1924/2013; Roberts, 2007).

Recurrent reflective feedback discussions between leaders provide ongoing and repeated opportunities to nurture and develop behavioural alignment and relational connection, while also ensuring the development and alignment of shared mental models relating to what is emerging at the individual, relational (i.e. inter-individual), dyadic, and group levels (Argyris, 1997; Burke et al., 2003; DeRue, 2011; DeRue and Ashford, 2010; Kozlowski and Chao, 2012; Okech, 2008; Raelin, 2006; Salas et al., 2009a). This enables leaders to enhance connection with each other, and to ensure alignment to what is emerging in the room. Such alignment supports subsequent adaptability of the dyad in response to emerging group conditions (Kozlowski et al., 2009). These reflective discussions also support ongoing learning about all facets of the co-lead, allowing the leadership Dyad to continue to develop and mature (Dugo and Beck, 1997; Fall and Wejnert, 2005; Okech, 2008).

This study has shown that Co-Active Leadership lies at the interface of what individual leaders are doing and who they are being within the context of their dyadic relationship. Being refers to the mindset of leaders and their individual resilience in the face of potential triggers, to maintain and recover safety within the relationship. This facilitates the expression of positive, generative responses within the dyad, and prevents any perceived need to respond through ego or power, both of which led to disconnection. This mindset also relates directly to each leader's willingness to both lead and follow, without which there cannot be any co-generation. As co-leaders actively develop their relationship and alignment around the emerging task completion, they provide the context from which the single leadership entity can emerge.

4.3.4 Progressive and dynamic effects of OFF Leadership

This dynamic positive insight of Co-Active Leadership was reinforced by what was lost when Co-Active Leadership was OFF. In summary, the difference between whether Co-Active Leadership was ON or OFF, was seen to reside in the relationship between co-leaders, and the relationship co-leaders had with themselves. When co-leaders each perceive their relationship to be one of high-quality, they are able to express themselves emotionally, they trust the relationship has sufficient resilience and that it can create from diversity or unexpected events (Dutton and Heaphy, 2003). When this is not the case, and one or both leaders feel the need to protect or focus upon themselves, either in relation to power, or esteem (Ego), the single leadership entity dissolves (Crocker et al., 2010; Jordan, 2004a; Roberts, 2007). More than this, however, when the Single Leadership Entity dissolves, the 'amazingly positive' outcomes it has for participants and leaders shifts very quickly to 'amazingly negative' outcomes. As one participant described it, "I think it's kind of a sword with two edges" (04p2).

This volatility is reflected in the literature and may actually contribute to the positive reviews that shared forms of leadership receive in the literature while maintaining its wide-spread absence in organisations (D'Innocenzo et al., 2014; Nicolaides et al., 2014; Ulhøi and Müller, 2014; Wang et al., 2014). Research that has looked at this disruption to effective leadership sharing has identified personality differences, a lack of chemistry or interpersonal conflict as leading to co-leader disconnection (Anderson and Speck, 1998; Cook and Friend, 1995; Jones and Harris, 2012; Mastropieri et al., 2005; Roth and Tobin, 2004; Scruggs et al., 2007). Issues of power have also been identified as leading to conflict, at times leading to a competitive stand between co-leaders as they try to better the other reflecting the themes of Ego and Unbalanced (Ferguson and Wilson, 2011; Krause et al., 2015; Okech and Kline, 2006). Inside organisations, issues of trust and power have also impacted the ability of co-leaders to

empower the relationship between them (Krause et al., 2015; Raelin, 1997; Reid and Karambayya, 2009; 2015).

This study has reinforced and expanded this understanding by identifying three triggers that led to the dissolution of the single leadership entity. These were described as being a perception of vertical separation (Unbalanced Leaders), horizontal separation (Leader Misalignment) or Leader Individuation (Ego). Of these three, vertical separation emerged as leader behaviours positioned themselves above (leader UP) their colleague by declining leadership claims, correcting their colleague, or other forms of 'speaking down'. Leader down behaviours most often emerged from a withdrawal, or unwillingness to make leadership claims. With either or both of these were present, it led to the establishment of a hierarchy, where one leader was seen as senior, and thus more important, and the lower (junior) leader as more of an assistant. Horizontal separation emerged as leaders, while relationally equal, moved in different directions, requiring participants to first determine and then select which direction to follow. The final trigger emerged as one (or both) leaders were perceived to make the themselves the centre of attention. Not only was this seen to separate the leaders, participants felt excluded from the relationship when this happened. In each of these three cases, the single leadership entity, dissolved into (or toward) two individual leaders. Interestingly, Leaders described the perception of these separating behaviours sometimes becoming triggers for them to also withdraw connection, thus reinforcing the separation.

Irrespective of which trigger was present, the dissolution was not seen as binary, rather, the severity of the impact depended upon, and matched the severity of disconnection between the Co-Leaders. The more that the leaders disconnected from each other, the more that participants disconnected from the leaders and withdrew from, what had previously been, an immersive and safe climate within the room. This disconnection was characterised by

feelings of nervousness and fear as well as exhaustion emergent from an increased amount of energy invested to stay attentive and present to what was happening (Jordan, 2004b). As the leader described withdrawing into their head asking lots of questions, so too participants described withdrawing to an observational place in their minds where they could better evaluate what was happening. In both cases the connected self withdraws connection to a more independent perspective (Jordan, 2004b; Raelin, 2003).

As the Leaders began to disconnect and the Single Leadership Entity dissolved, they began to be seen as two independent leaders. Participants found it difficult, if not impossible, to simultaneously follow two individual leaders. To address this, Participants responded by identifying and selecting a single leader to follow, unsurprisingly, it was often the one they perceived to be more 'senior', or the one with whom they felt most connected (i.e. Cohen and DeLois, 2002). The actions and contributions of the 'other' leader were then received in a manner that was described as being filtered through the reactions of the 'chosen' leader as participants waited for approval or alignment from 'their' leader. This strategy helped to minimise the confusion of different perspectives that now seemed to be in conflict, rather than adding richness, though it also increased the cognitive effort and complexity now required to follow the leaders. As discussed earlier, this perceived fear, withdrawal and increased cognitive effort required participants to invest a greater amount of energy into the interpretation of, and response to the complex leadership situation (how to follow), meaning that less attention was given to their role of participant in experiencing the content and learning (actually following). Thus, resulting in greater cognitive and emotional exhaustion and reduced learning outcomes.

4.3.5 Summary

When considering the structural descriptions and models outlined in the introduction, this study provides support for extant dimensional models, and suggests their extension. The three

triggers identified as inhibiting Co-Active Leadership related to key dimensions required for the emergence of the Single Leadership Entity. Framed positively, these are co-enactment, connection and power balance. Reflecting upon the models presented by Contractor et al (2012) and Dust et al (2015), the structure of Co-Active Leadership is fixed and defined as subset of two preidentified leaders, facilitating a larger group.

When exploring the dimensions emergent from this study, **Co-Enactment** relates to where both Contractor et al. (2012) and Dust and Ziegert (2015) were looking and identifies the level of simultaneous role sharing between leaders (the dimension of time). In the space of Co-Active Leadership, this reflects the frequency of leader transitions, and how distinct co-leader contributions appear within the leadership dyad. This dimension differentiates the concurrently co-enacted nature of Co-Active Leadership from more traditional, rotational or turn-taking forms of co-leadership. This is explored further in the Action Chapter.

Connection is a relational dimension between the two leaders and reflects the quality of connection between leaders, as well as the emergence of dyadic states such as trust, safety, permission, flow, and the expression of individual uniqueness, authenticity, humility and emotion. Connection seems to also refer to task alignment, at the highest level, while providing space and acceptance of diverse and potentially divergent thinking on both content and path to achieve outcomes. Without connection, however, two leaders are perceived and interacted with as two independent individuals, even if they are aligned on the task.

The third dimension relates to the **power balance** between co-leaders. In other words, balanced power relates to the absence of a perceived relational hierarchy within the dyad. While this needs further research to explore the details, this dimension appears to be relational, rather than task related, in that it reflects the relational interactions between leader rather than seniority or experience differences.

Related to co-leadership dynamics, **power balance** is connected to the willingness of individual leaders to proactively express their contributions (leadership claims), and the responsiveness of their co-leader to grant these claims. Power balance appears to be an enacted, interaction based process between the co-leaders, and so has connection to the dynamic, relational construction of leadership (Crevani et al., 2007; 2010; Denis et al., 2012/2015; Raelin, 2003; 2014).

These dimensions, along with the levels identified in the descriptive model shed some light as to how Co-Active Leadership can be developed to enhance the impact it creates for both participants, and Co-Leaders. This is explored in the next section.

This study has been able to shed light onto the dynamics of the Teamwork of Leadership. In doing so, it has shown the contribution of individual, relational and dynamic levels of interaction that combine to support, or inhibit, the emergence of shared leadership and the single leadership entity.

4.4 How can Co-Active Leaders enhance (DEVELOP) participant experience of Co-Active Leadership to increase its positive impact?

Having explored the range of impacts created by Co-Active Leadership and what was seen to create the associated positive and negative effects, this next section explores how Co-Active Leaders can enhance participant experience to increase its positive impact. Because this question is informed by and builds upon the previous research questions, this developmental focus was held as a secondary layer of exploration, initially informed by the interview data directly related to this question and the insights from the exploration of description and impact of when Co-Active Leadership in On and Off. More than this, however, the exploration of this question is continued in the upcoming Action chapter as these interview insights were applied and tested within my work environments. Rather than summarise the details presented in the previous chapter, the focus of this section of the discussion is to

integrate and summarise the insights gained from all interview components as to their

implications for action.

4.4.1 How to Develop

When asked how they saw Co-Active Leadership being developed, interview responses

pointed to a distinction between what leaders were doing and who they were being. As seen

in the earlier exploration of the Co-Leadership dynamics, being and doing interact to

influence how leaders perceive the situation and relationship influencing how they interpret

and respond to the contributions of their colleague.

More than this, the models emergent from interviews and the experiences of participants,

assistants and leaders point to multiple developmental opportunities. Consideration of these

multiple opportunities initially related to the descriptive model, with development

opportunities related to each of the six levels supporting the emergence of the Single

Leadership Entity:

1. Individual Leader
2. Co-Active Commitment
3. Co-Leader Design
4. Co-Leader Relationship
5. Co-Leader Behaviours
6. Reflective Feedback

Further consideration was needed to include the insights provided by the triggers of OFF

Leadership:

1. Co-enactment
2. Connection
3. Power Balance

And of course, in describing Co-Active Leadership through multiple levels of analysis, there are opportunities for leaders and leadership to be developed at the individual, dyadic, and group levels (Day et al., 2009; Kozlowski and Chao, 2012; Kozlowski et al., 2009)

As this research is intended to inform Action Cycles to apply, test and further explore the development of Co-Active Leadership, I took a practical view to summarising the insights related to this research question. Specifically, I asked the question that 'if this insight were to be applied, what would it mean for the development of Co-Active Leaders?' This allowed the current section to overview insights related to the development of Co-Active Leaders without having to answer specific questions as to how to support development in these areas.

As I looked through this lens, I began to see simplicity within the complex interaction of multiple models and levels.

- There is need to develop both Leaders and Leadership at multiple levels
- Co-Active Leadership begins with design
- Design must then be dynamically enacted and developed, and recovered

4.4.2 Develop Leaders and leadership

What has emerged from the interviews is the interaction between the doing and being of both individual leaders and the leadership dyad. Being refers to the mindset of leaders and their individual resilience in the face of triggers, to prevent perceptions of threat or attack, or the need to respond through ego or power. This mindset also relates directly to each leader's willingness to express humility and authenticity as they both lead and follow, without which there cannot be any co-generation, or co-leadership.

From a Leader perspective, this points to the opportunity to develop the ability and willingness of individual leaders to express their full selves with humility and authenticity (Avolio and Gardner, 2005; Chiu et al., 2016; Gardner et al., 2005b; Owens et al., 2013). Such approaches would support leader willingness to admit limitations and mistakes, to

spotlight strengths of others, and to be open to feedback and learning (i.e. Morris et al., 2005; Owens and Hekman, 2016). Authentic leader development would support leaders to enhance their expression of self-awareness, balanced information processing, authentic behaviour, and relational transparency (i.e. Avolio and Gardner, 2005; Gardner et al., 2005b; Walumbwa et al., 2008).

Intimately connected to this, is the development of Leader mindset and intrinsic leadership definitions which support and allow both a commitment to, and enactment of leadership sharing (Kennedy et al., 2013). Such development supports the expansion of leader identity from an independent view, to a more interdependent, or relational perspective (Fletcher and Käufer, 2003; Jordan, 2004b; Raelin, 2003; 2014). Leader development in this area is likely to support Leader capacity to identify and respond to both relational and situational complexity while maintaining and developing positive relationships (Day and Harrison, 2007; Kegan, 1982; McCauley et al., 2006; McCauley et al., 2010).

While mentioned tangentially, one key aspect to the development of Co-Active Leaders, is their ongoing experience of Co-Active Leadership. This may seem redundant, yet gaining experience is relevant for ongoing skill development and mastery, and experiences of co-leadership serve to build confidence and competence (Roth et al., 1999; Roth and Tobin, 2002; 2004). In this sense, Co-Active Leadership can become a positive cycle of leadership development for leaders, while also providing working examples to support the integration of a new implicit definitions of leadership. This is actively supported by the role of reflective feedback as action learning cycles to develop both leaders and leadership (Day, 2000; Raelin, 2006).

When considering Leader development to support Co-Active Leadership, the dimensions of co-enactment, connection and power balance must be attended to, because their omission

inhibits the emergence of the Single Leadership Entity. Seeking to develop Co-Active Leadership only at the individual level, with a focus on self may reinforce greater distance rather than the intended connection between the co-leaders. Such a mindset (being) is likely to trigger both ego, for its focus on the individual self, as well as unbalanced leadership through the unbalanced view held by this leader if they see such development as corrective, potentially reinforcing a view of being less than their colleague (Crocker et al., 2010; Jordan, 2004a; Roberts, 2007). Similarly, a Leader only developmental strategy may result in greater focus upon self or the viewing of self as an expert, thus potentially triggering Leader up or Ego reactions between the co-leaders.

Therefore, to facilitate the development of Co-Active Leaders, it is important to attend to both Leader and Leadership levels (Day, 2000; Day et al., 2014). Through this dual focus, leaders can seek to build individual and collective (dyadic) resilience in the face of triggers, and to prioritise the reconnection of the co-leader relationship. Development would include attention to creating and maintaining Power Balance, Connection and Role Co-Enactment though specific attention to the practice (task and relationship) of Co-Leader Design as well as the enactment of Co-Leadership Dynamics to create relational conditions to support the emergence and recovery of high-quality co-leader connection.

4.4.3 What does this research say about Leadership Development?

At the level of leadership development, Co-Active Leadership begins with Co-Leader Design. From this foundation of co-leader connection and the alignment on task and relational success, co-leaders then have the opportunity to enact leadership. Frequent reflective feedback dialogue between the co-leaders enables them to realign, reconnect and to develop and enhance their relationship with each other and the group. This research highlights the importance of attending to these constructs of co-leadership design, enactment and recovery.

4.4.3.1 Design

Co-Leader design is seen to be a critical aspect of co-leader development because of its importance in building a high-quality relational foundation and the safety for full individual expression. From an effective relational design, leaders will begin to create a high-quality connection (Dutton and Heaphy, 2003; Stephens et al., 2012) and to lay the foundation for the emergence of the five good things indicative of good connection (Comstock et al., 2008; Fletcher, 2003; Fletcher and Käufer, 2003). When developing new leaders, this design would likely need to provide context and direction on how to lead co-actively, as well as building the permissive space for new co-leaders to co-lead. Design would need to include all levels, including the initial alignment and connection, how to enact co-leadership from a behavioural and relational perspective, how to have productive and positive reflective dialogue to reconnect, realign and deepen the co-leader relationship.

4.4.3.2 Enactment

Exploration of the Descriptive model suggest that development around the dynamics of leadership would be useful. Specifically, an individual's willingness and ability to both lead and follow, i.e. to contribute voice and make leadership claims, while also being willing and able to grant the claims of the other and to transition from active to observational leadership roles. The model of Co-Active Leadership development suggests that attention be paid to both the doing (behaviour), and the being of leaders. Each of these also point back to the development at the level of individual leader to be able to express humility and authenticity to enact leadership sharing, though this is also contextualised within the dyadic relationship.

4.4.3.3 Recovery

The final opportunity for development reflects the ability of each leader, and the leadership dyad to be able to identify and positively respond to misalignment and disconnection. The exploration of OFF Leadership showed that leader disconnection is not a binary event, rather

it is progressive and emergent through the enactment of disconnecting responses from each

leader. In this sense, increasing leader and dyadic ability to recognise and respond to early

forms of disconnection and misalignment may allow leaders to prevent recover connection

and return to the positive outcomes created by Co-Active Leadership when it is ON.

Importantly, recovery is likely to be a complex topic because feedback can be challenging

when people are connected, yet recovery is most important at times of disconnection and

misalignment. Helping leaders to remain open to dialogue and reconnection with their co-

leader when things are not going well provides a great, and likely emotional opportunity for

co-leadership development.

4.4.4 New Insights from this Research

This research into the impact of Co-Active Leadership has highlighted the relational benefits

of this form of collaborative leadership. It has connected much of the diverse literature,

integrating psychological and interpersonal constructs and linked them as emergent benefits

of Co-Active Leadership, and likely, other forms of shared leadership.

Participant experience clearly showed that Co-Active Leadership supported the presence of

relational psychological constructs such as the emergence of psychological safety

(Edmondson, 1999; Nembhard and Edmondson, 2012), trust (Bergman et al., 2012; Gillespie,

2003; Gillespie and Mann, 2004; Rousseau, 2006), intimacy (Prager and Roberts, 2004/2013;

Roberts, 2007) and high-quality relationships (Fletcher, 2007; Stephens et al., 2012).

Constructs of authenticity and transparency connected to Authentic Leadership were also

discussed both in experiencing Co-Active Leader authenticity, and the powerful impact it had

on the participants and the emergent space (Avolio and Gardner, 2005; Coghlan, 2008;

Diddams and Chang, 2012; Gardner et al., 2011; Sparrowe, 2005; Walumbwa et al., 2008;

Yammarino et al., 2008). Participants also described a sense of Flow that emerged through their full and authentic immersion in the experience of Co-Active Leadership.

As seen in this study, the experience of Co-Active Leadership allowed, and supported participants in changing their definition of leadership in a direction that matches the post-modern progress of research into leadership theory, leadership development, organisational development, teaching etc. As theories are progressing in this direction, then helping leaders to evolve their 'in-use' or 'implicit' theories of leadership becomes an essential step (Argyris, 1976). Especially when one considers the being and doing of the leadership where a leader with the skill to share leadership (doing) would not consider this if it did not fit with their implicit theory (being), this becomes an essential step in the evolution, not of leadership theory, but in the development of leaders and leadership within organisations (Kennedy et al., 2013).

As an example of shared leadership, Co-Active Leadership brings teamwork to leadership and will be well served by development at both leader and leadership levels (Day and Dragoni, 2015; DeRue and Myers, 2014). This study has highlighted the importance of attending to internal constructs related to being as well as the behavioural and relational aspects of leadership. As a constructive and emergent form of leadership, Co-Active Leadership and its single leadership entity, need to have the relational space within which each of the co-leaders feel sufficiently safe to express their full self within the relational context. To facilitate this, leaders can enhance their own ability to intentionally create this safe, high-quality relational space, through effective connection and design with themselves and co-leaders. Building on this, leaders can also seek to enhance their ability to recover when they (and/or their co-leader) are triggered, to better and more rapidly stop what could become a vicious cycle of disconnection and withdrawal, and to reconnect, rebalance and continue the concurrent co-enactment of the shared leadership role.

The development of Co-Active Leadership will be explored further in the Action Chapter as these insights are practically applied to my work context through cycles of action research.

4.4.5 Moving into the Next Chapter

This chapter has sought to summarise and integrate the insights emergent from the phenomenological exploration of how Co-Active Leadership was experienced by Participants, Assistants and Leaders. It provides a foundational understanding which has subsequently been applied through cycles of action and reflection. The next chapter will explore the action research cycles and how they impacted my organisational environments. It will also layer in my personal journey across this research period reflecting the impact this research has had on me as an insider action researcher. The Action Chapter leads towards the conclusion chapter which summarises the research journey and clarifies the emergent answers the primary research questions.

Chapter 5: Action Research

5.1 Introduction to the Action Chapter

From the beginning, this research project was intended to be an exploratory study aimed to provide a better understanding of the nature of Co-Active Leadership and its impact to support its effective implementation in new contexts. The phenomenological approach to understand the lived experience has provided a rich foundation to understand Co-Active Leadership, what it is, its dynamic and emergent nature and some insight into leader and leadership development. Insider Action Research supplements this understanding with cycles of practical application of this new knowledge, seeking to create organisational change.

This chapter provides an overview of the journey of Action and Research and the context within which this has occurred. While much Action Research happens in a single organisation, community or system, this research was conducted at the convergence of multiple organisational systems. This occurred due to my involvement with multiple work roles.

5.1.1 Contextualising the Action Research

Early in the study, while reflecting upon a series of workshop leads and connecting them to what I was learning about the research questions, I realised that this study was not having any impact upon CTI as an organisation, neither at the global level, nor within my local team. Given the centrality of change to action research, this was quite worrisome and led me to reflect upon the entire project, its progress and where it was heading.

The question I found myself asking was related to 'how understanding and describing Co-Active Leadership and its impact had changed CTI?' Upon making this explicit, I realised the futility of the question. CTI has been successfully using Co-Active Leadership for over 25 years as a central and distinguishing part of their training programs and has implemented a similar approach to organisational leadership, currently enacted by three Co-Presidents. Over

this time people have intuitively and experientially understood the impact that Co-Active

Leadership brings, and as a company they have developed structures of using Co-Active

Leading as a way to develop other co-leaders (i.e. Roth et al., 1999; Roth and Tobin, 2002).

Realising this, it was clear I was holding an implicit aim for the research study that, to date,

had not been articulated.

To clarify my aim, I began exploring the interaction between my three research questions and

saw them as progressive steps in a journey of application. Specifically, I saw that if I wanted

to apply Co-Active Leadership beyond CTI, there were two ways to do it. Firstly, I could

work with people who were trained by CTI and already knew how to lead Co-Actively.

Secondly, I could facilitate this learning for them.

To help someone learn how to lead co-actively, I would want to describe **what** Co-Active

Leadership is, in a way that helped them understand this form of leadership. People would

want to understand the impact it can have so they can see **why** we would consider this form.

And finally, I would want to know **how** to help them develop their abilities to lead co-

actively.

It was clear that while important and central to this research, these initial research questions

were leading towards the question of how forms of shared leadership can be implemented

within organisations, and specifically:

- How can Co-Active Leadership be implemented beyond CTI?

Two important insights emerged from this realisation which served the ongoing action-

research cycles. Firstly, it showed that there were two distinct layers of inquiry supported by

combining a phenomenological exploration with insider action research. Exploration of the

lived experiences of participants, assistants and leaders provided a rich understanding of the

why, and **what** of Co-Active Leadership, while also shedding some light onto the **how**. The

insider action research provided opportunities to apply this learning. Secondly, this awareness

provided a greater contextualisation of what I was initially seeing as an absence of impact

upon CTI as an organisation and brought clarity to the purpose of my action cycles as related

to the development of both leaders and leadership (Day, 2000):

- How can I develop as a Co-Active Leader?
- How can I develop Co-Active Leadership (inside and beyond CTI)?

Gaining clarity on the implicit structure and relationship between these questions informed

the structure of this chapter. It begins with a presentation of initial unsuccessful attempts to

apply Co-Active Leadership, before summarising my developmental journey as a Co-Active

Leader and then outlining successful examples of implementation. Each section summarises

key insights and learning as well as making connection to the knowledge emergent from the

phenomenological exploration presented in the Discussion. The chapter concludes with a

summary of my journey as a researcher throughout this process.

5.2 Early attempts to apply Co-Active Leadership

Early in the journey of Action cycles, an opportunity emerged where myself and three of my

CTI Leader colleagues participated in a facilitator-development workshop delivered by

another company. While unplanned, this provided an opportunity for the emergence of an

impromptu action/reflection group. Collectively, the four of us saw value in bringing a Co-

Active style of Leadership into this new workshop environment. We also used this

opportunity to reflect upon the differences between the presented facilitation model and Co-

Active Leadership.

5.2.1 Experience of Co-Leading Versus Co-Active Leadership

Attendance at this workshop provided insight into how other companies work in this space of

facilitating programs designed to deliver more than content. Coming out of a top-tier global

consisting firm, this work was positioned as transformational and pushing the boundaries of current organisational understandings of leadership. Importantly, this programme is widely delivered and does create transformational impact for client organisations.

What we saw was a workshop delivered in a way that was described as co-leading yet was noticeably different from Co-Active Leadership. As a group, our discussion was not whether this form of Co-Leadership works, nor was it a direct evidence-based comparison of the impact of these two forms (though both are opportunities for future research), rather it reflected our perceptions of how it differed from Co-Active Leadership.

> In our opinion, this programme "wasn't co-facilitated. It was still (delivered) from an expert mould, an expert mindset. … There was some overlap or some transitions from the 'co-leaders,' but for the most part it was tag-teamed, (where) this person does one bit and that person does one bit. In fact, the whole concept of co-leading (within this company) **IS** tag team." Journaling 20160930

Expanding on this journal excerpt, workshop components were allocated between the leaders for each to deliver independently, with the leadership formally transitioned as new learning modules began. While in general the hierarchical status of the two leaders was positioned as equal with both being workshop leaders, the status of each leader during each module alternated between primary and secondary roles. Linking this approach to models described in the literature, it was more of a Dual Independent (Dust and Ziegert, 2015), distributed (DeRue, 2011) or rotated (Contractor et al., 2012) approach to sharing leadership across the workshop. From a Co-Teaching perspective, this reflected alternate teaching (Cook and Friend, 1995) or a model based upon content distribution (Easterby-Smith and Olve, 1984).

5.2.1.1 Co Leading viewed through the Emergent Models

With models having emerged from the analysis of interview data, I began to reflect on what they brought to this experience of a rotated form of leadership sharing. This experience provided a great opportunity to consider the similarities between this form of co-leading and my emergent understanding of Co-Active Leadership. The similarities were primarily linked to the theme of Benefit of 2 Leaders which enabled the co-leadership team to have a greater awareness of the room and the potential for back-up behaviours. The rotation of the two leaders helped to maintain energy and engagement with participants as two co-leaders still brought different styles and perspective to their segments. There were moments of role-modelling in how the leaders transitioned roles, though this was noticeably less than with Co-Active Leadership, given the reduced frequency and increased formality of these transitions.

Interview data revealed three dimensions of Co-Active Leadership: concurrent enactment, connection, and power balance. Looking at Co-leading across the day, all three dimensions could be viewed as high as the day was concurrently led, power balanced, and leaders connected. At the level of momentary dynamics, however, this form of co-leadership consisted of the independent and sequential enactment of leadership roles i.e. low role concurrency. Interestingly, this rotated form of leadership reflected a traditional and hierarchical approach to team leadership, consisting of the independent enactment of interdependent roles.

As mentioned, at the momentary level, Rotational Co-leaders appeared to be high in connection, low in co-enactment. Power-balance, however, was less clear. Within each learning module there was a primary and secondary leader, so my initial thought was that this defined power-balance as low. Yet, consideration of the leadership dynamics and the claiming and granting of power between these leaders reminded me that in this form of co-leadership, I had no evidence as to the co-leader power balance. These leaders had few

transitions which tended to be predefined and restricted to the beginning of new modules. As such, further study is required to better understand the power balance. This examination shed light into the difference between Co-Active Leadership and rotational co-leading, in that power balance is not necessarily important in rotational co-leading if there is effective design and role allocation. Co-Active Leadership, however, seems to require power balance and falls apart in its absence.

Further reflection on the role of power suggests that the use of structural interdependence in predefining roles and role transitions can provide a proxy for power-balance, or at least prevent or reduce power imbalance. In this sense, structural clarity provides power and relational clarity when co-leading which reduces the complexity inherent in Co-Active Leadership, where co-leaders need to dynamically co-create in relationship with each other. I can see how this structural alignment can be a response to the volatility seen with Co-Active Leadership, removing (or minimising) one of the three triggers to OFF Leadership. This may be part of the reason I have seen more rotational co-leading in organisations than I have seen Co-Active approaches to leadership.

While this experience did not allow a direct comparison of the impact of these two forms of leadership sharing, it reinforced the importance of being able to effectively describe Co-Active Leadership and how it is differs from other similar approaches. It also reinforced the importance of its naming. As a name, Co-Active Leadership reflects the concurrently active (i.e. co-active) nature of the leadership interaction, and not just its collaborative nature. Co-Leading within this experience included the co, which reflected multiple people, yet the leading remained singular in how it was enacted.

5.2.2 Application: Seeking to be more 'Co-Active'

As well as providing an opportunity to reflect upon different configurations of leadership sharing, this facilitator-development workshop, and in subsequent deliveries with this organisation, provided my CTI Colleagues opportunities to bring more Co-Activity into their leadership. Three key, unsuccessful examples emerged which, each highlighting different components essential for future application.

5.2.2.1 Defining Forms of Co-Leadership

At one point during the facilitator-development workshop, we were required to present some of the modules we were being taught to deliver. As we began, one of my CTI colleagues asked if we could co-lead. The response he received was along the lines of

> "Yes, you can co-lead. Just work out who's going to do what part."
>
> Journaling 20160930

Hearing this response, I could see that the workshop leader believed that he understood the request, yet his understanding of the phrase "co-lead" was different to that intended by my colleague who was asking if we could Co-Actively Lead the segments. In relation to this study, it was interesting for me to witness this misunderstanding and see how two different mental models of co-leading overlapped in how they used the same language. This was also a clear example of our inability to effectively articulate Co-Active Leadership in ways that allowed the request to be understood by others.

This misalignment reinforced the importance of the current study in providing insight into what Co-Active Leadership is and how to effectively describe it. Additionally, it highlighted the importance of such descriptions in being able to generate buy-in and support from others, in order to integrate Co-Active Leadership into contexts beyond CTI.

5.2.2.2 Logistics of Co-Active Leadership

In another example, the response to a similar request followed by a description of Co-Active Leadership was one of confusion as reflected by the question "But, how do we know when to speak, or not?" This functional and behavioural approach viewed Co-Active Leadership as a task. Importantly, it also reflected progress upon the first example as here, this colleague was more effective in describing Co-Active Leadership in a way that her colleague was able to begin to consider options to functionally lead in this manner, even if this consideration was limited.

Discussing this event with my colleague, we saw the importance of the emergent models in attending to Co-Leader Behaviours and Relationship, as well as to the dynamic interaction between them. When considering this through the lens of implicit leadership development, this also appeared to be an example of this co-leader seeking to understand the dynamic and rapid leadership transitions through a definition of leadership sharing being equivalent to rotation, as this question sought to define the functional aspects of how and when to rotate. Building upon the first example, this reinforces the use of structural alignment to simplify the complexity of co-creative leadership dynamics when leaders are co-active.

5.2.2.3 Building Co-Leader Alignment

In a third example, another of these CTI colleagues was working on a project delivering these workshops and found himself in a difficult lead. As it was described to me, working with his co-leader was exhausting, challenging and incredibly frustrating as my colleague attempted to lead co-actively. This continued until he said to himself "I'm not going to co-lead. I'm going to tag-team" (LDR 1).

As we discussed this event, he identified the importance of redefining his own implicit understanding and expectations of how co-leadership was to be defined within this relationship. Prior to this redefinition, he was seeking Co-Active Leadership, frustrated by its

absence, and specifically by his co-leader's inability or unwillingness to do so. After
redefining his expectations to align with his Co-Leader, they were able to find their rhythm.
This reflected the importance of the descriptive model, particularly the Co-Active
Commitment and Co-Leader Design. Equally important, this example reflects an internal
reflective loop as my colleague reflected upon what was, and was not working in his co-
leader relationship, before taking responsibility to improve connection and alignment with his
co-leader.

5.2.2.4 Insights from Unsuccessful Applications

These attempts exemplified some difficulties of bringing Co-Active Leadership into
organisations as it seems to be a form of leadership that is difficult to explain, and one with
which others have no baseline experience with making it difficult, or impossible for them to
connect to through words.

The importance of having an **effective description** of Co-Active Leadership was reinforced
by the overlap in the use of language used to describe these two different approaches to co-
leadership. Being able to effectively describe Co-Active Leadership will help to gain support
for the consideration and implementation of this approach. These examples also show that an
effective description, while necessary, is insufficient for successful implementation, as even
if people 'get it', they may get stuck on 'how to do it' from within their own implicit
definitions. In addition to the conceptual understanding, new leaders may also need to
experience the concurrent enactment of leadership in order to develop a mindset that supports
the doing and the being of dynamic co-creation.

Additionally, it was interesting to note the attachment CTI leaders had to a Co-Active
approach. Leaders felt that rotational co-leading lost the sense of true collaboration and co-
creation. Collectively, our view of Rotation, as it was experienced in this programme, was

that alternating roles felt exclusionary and, at times, more about the facilitator demonstrating their knowledge (Ego) than it was about the learning of the participants.

It is important to note that since this comparison between different forms of Co-Leading was not the focus of the study, firm conclusions cannot be drawn. These examples of leader attachment point towards the importance of further exploration and comparison to separate leader bias or preference from actual benefits of these approaches. Further research is also needed to determine the differential benefits and boundary conditions for where and when each form of leadership sharing is most relevant.

5.3 Personal Development as a Co-Active Leader

Building upon the shared experiences of my colleagues, this study provided me with an opportunity to travel along my own leadership development journey. Integrating reflective cycles before, during and after multiple workshop leads allowed me to explore, experiment and reflect. This process enabled me to learn in a range of areas, many of which are applied later in this chapter to enact a Co-Active style of leadership in a new organisational context. There was, however, a particular experience which integrates many levels of learning arising from this study.

5.3.1 A Challenging Journey

As a Co-Leader, my journey was filled with many personal challenges, each of which provided an opportunity to explore how I understood myself, my role as a Co-Active Leader as well as Co-Active Leadership in general.

In one such example, I received feedback from colleagues that I was technically strong as a leader, but there was more that people wanted, specifically relating to "connection, authenticity etc" (SR Email 13/5/15). Given the importance of this feedback to myself as a leader, and this research project in general, I reached out to a senior leader, with whom I had

recently led, and asked their insight and thoughts about this feedback. They responded saying:

> "My personal experience of leading with you was that I felt that you
>
> felt you could do it all by yourself and that there was very little need
>
> for a co-lead dance partner. We felt a bit like two separate individuals
>
> that were delivering the material well but missing something in terms
>
> of the co-lead magic." SR Email 13/5/15

Receiving this message from my colleague triggered many thoughts about vulnerability, authenticity and connection, and encouraged me to explore what they meant for me personally. It also pointed me towards how I was contributing to my role in creating the co-leader relationship and what I was doing to create safety for my colleagues to show up authentically, and to grow.

I began to notice examples, both at home and during workshops where I felt that I was being open, expressing my 'heart' and allowing myself to be seen. I also noticed in these same examples, how (I perceived) people responded to me as if this sharing was insufficient. I got to a point where I felt that "when I am guarded it is not enough and people want to see more of me; and when I am transparent and show them what is going on it is still not enough, and people want to see more of me!" It felt as if nothing I did was enough in these relationships.

Reflecting upon this internal narrative, it was interesting to note that what I was describing was high self-monitoring behaviour, seeking to be seen as authentic as I sought to meet the needs and expectations of others, rather than to actually be authentic (Hughes, 2005). The literature on Authentic Leadership identifies four key components, relating to self-awareness, balanced information processing, authentic behaviour and relational transparency. Reflecting upon this, I felt that people were requesting greater relational transparency, within which

"lies the commitment of a leader to help a follower to see the leader's true self" (Hughes, 2005, p. 86).

Through the descriptive model of Co-Active Leadership, my colleague seemed to be pointing to **Co-leader Relationship** and particularly how I as an **Individual Leader** expressed my Authenticity to support intimacy and connection. Her request showed the interaction between these two levels in the model, enabling me to pay more attention to their interaction within myself as a Leader.

5.3.2 Applying this Learning

During the research period, there was one colleague with whom I had a series of difficult leads. Across these leads, we continuously discussed the challenges we faced and repeatedly redesigned our relationship, only to find that nothing improved. It got to a point where we considered never again leading with each other, and engaged other colleagues to mediate a redesign conversation, which, again had little impact. Personally, this was most frustrating because this study was seeking to effectively apply Co-Active Leadership into new organisational contexts, and here I was unable to lead Co-Actively within CTI!

On the morning of a subsequent lead I gave myself time to clarify my intentions for the weekend. In setting these intentions, I planned to pay particular attention to the part of the descriptive model that I controlled, that of myself as an **Individual Leader**. I sought to avoid being judgemental of myself or my colleague, and where I did notice this, my intention was to let it go. By removing judgement, I wanted to give myself full permission to be authentic, and to simultaneously create a space within our relationship that also gave my co-leader permission to be authentic, in whatever this brought. To this effect, I journaled:

> "if he wants to be angry, cool. If he wants to be upset, that's cool. If he
>
> wants to be angry or upset at me, that's cool, 'you can choose that

> man, that's awesome. What help do you need from me on that? How
>
> can we stay connected and support each other through this?... (And for
>
> me) to not be triggered through all of this" 20170420 SYN am d1

From this perspective, I aimed to take responsibility for my contributions to our emergent co-leader dynamics. To bring humility and to recognise and articulate the value and strengths of my colleague, and importantly, to let go of what I thought should happen. In exploring self-awareness, I had realised my tendency to control what happens in the relationship, thus preventing co-creation. For this weekend, I wanted to:

> "let go of what I think this weekend is going to look like. … to just be
>
> surprised by what emerges because of its brilliance and whatever
>
> emerges is brilliant, and whatever we create from that is brilliant, and
>
> really holding (an) … 'artistic perspective'" 20170420 SYN am d1

During our first day, there were times I triggered him. There were times where I was triggered and felt like I needed to hold back. In many ways, this first day was exactly like the other challenging leads we had together. My ego was quite disappointed with this as I had hoped that all of my learning and insight would have culminated in creating the perfect conditions for a wonderful co-lead. I was hoping that this would be a capstone for my research, unequivocally documenting my growth as a co-leader and my ability to develop others.

Then I realised that this was all about me, and Ego is one of the things that gets in the way of Co-Leading, so I let it go. As I reset for day two, I gave myself a question to help me stay connected to my initial intentions:

> "How do I bring that playful (energy and) create safety?" Journaling
>
> 20170421 SYN d2 am

The following journal entry captures what happened on that second day. In the morning of

Day 2

> My colleague and I "had a conversation, and he realized something.
>
> He realized that when we made the agreements with the participants to
>
> play and be playful, that he wasn't holding himself to that, and so, he
>
> says, 'I was asking the participants to agree with that. I raised my
>
> hand, but I actually wasn't giving myself permission to play or be
>
> child-like.'
>
> …
>
> He saw himself being rigid and stiff and focussing yesterday on
>
> everything that could go wrong and everything that was going
>
> wrong." Journaling 20170421 SYN D2 pm

In this story, my colleague recounted becoming aware of who he was being as an **Individual**

Leader. This insight had a significant and positive impact on what emerged between us for

Day 2.

> "today was completely different. It was easy. It was fun. It was
>
> playful, and (filled with) stupid things.
>
> …
>
> So, overall this is a wild success from a co-lead perspective. He
>
> described today as easy, I described today as easy. We worked hard,
>
> but it was also really easy and powerful, and transformational."
>
> Journaling 20170421 SYN D2 pm

I would like to think that my initial focus on who I was being and how I was creating

relational safety was what prompted this awareness, however further research is required to

explore the causal nature of this relationship. What this does tell me about Co-Active

Leading, however, is that recovery is possible. Recovery is possible because this is exactly

what happened. We had multiple leads that were difficult and hard, we looked at never

leading again, and yet here we were having a lead which we both described as powerful and

easy.

It also reinforces for me the importance of Individual Leaders bringing their authentic selves,

as well as the creation of a relational space that supports such authentic expression. While

this is a very specific sample and causality cannot be determined, by focussing upon how I

was being as a leader, and removing my contributions to an unsafe relational space, my co-

leader and I were able to have conversations in new ways which helped us to reconnect in

new and powerful ways. As I sought to remain non-judgemental and open to learning, I was

able to respond differently within the co-leader dynamics, seeking value and creating from

what my colleague was bringing.

5.4 Successful Application beyond the primary research context

My growth as a Co-Active Leader helped me to be able to effectively bring a more Co-Active

style of leadership into another company I work with, People Acuity. In this company, I

looked to implement Co-Active Leadership, initially in how we interacted internally, then

later into our own facilitator development programme.

5.4.1 People Acuity – The external context

People Acuity is a coaching and consulting company focussed on integrating strengths-based

interdependence into organisations. Based in the US, People Acuity was established as

Strengths Strategy in 2010. I began my association with Strengths Strategy in 2011, and am

now involved in all areas of the business, especially content development and International

delivery.

In setting the scene for the attempt to integrate Co-Active Leadership into our work with People Acuity, I feel it is important to articulate that the Company President and Founder had experience with CTI's Coaching and Leadership programs. This speaks directly to one of the prompts for this as a research project where people were unable to describe Co-Active Leadership, saying "you just have to experience it yourself". It is also one of a number of differences between this cycle of action and the unsuccessful experiences that occurred within the other company, described earlier.

While this may have provided an openness to shared forms of leadership, these were not integrated within the initial business model. At the beginning of this study, co-leadership was only ever used as a format to develop workshop facilitators through an apprenticeship type process. With no formal articulation of co-leadership (let alone Co-Active Leadership), the company purpose is focussed on creating what they refer to as Strategic Interdependence.

> "Strategic Interdependence is a state or condition characterized by the purposeful use of individual strength for the good of 'us' and 'others' (not just yourself) and by a willingness to allow weakness to be offset by the strengths of others." (Murphy et al., 2018)

Initially, this provided another example of misalignment between the content and theory delivered by a company and the format of how it was taught. In other words, an interdependent form of leadership was being taught by a single, independent leader.

Over time, and through many discussions regarding shared leadership and my research, the People Acuity Leadership team (of which I am part) began to align on its relevance, and importance to the company's work. Specifically, we realised that the company name, Strengths Strategy needed to evolve as it did not reflect our ultimate purpose.

Our work struck me as being aligned with this purpose of supporting, not just the concurrent enactment of leadership, but also the behaviourally interdependent nature of co-leader interactions. A Co-Active style of leadership was therefore an example of the Company Purpose. As a company we began to evolve our identity beyond strengths, and towards what we began to describe as People Acuity. People Acuity is a concept that we identified and defined as "the ability to clearly see and effectively optimize the value, capabilities, and positive untapped potential in yourself and others." (Murphy et al., 2018). A concept intimately connected with how an **individual leader** sees themselves and how this supports authenticity and humility, as well as reflecting the impact of individual mindset on their approach to building relational safety for themselves and others. This concept of People Acuity, reflected the interface between Individual Leaders and their ability to commit to interdependent (Co-Active and shared) forms of leadership, as described in the emergent model describing Co-Active Leadership.

Beyond clarifying and rebranding the company identity, the first practical application of embedding a Co-Active Style of Leadership emerged through the design of our Facilitator Development Programme.

5.4.2 Designing Facilitator Development

This Facilitator Development Programme sought to develop a group of 45 international facilitators who could deliver a specific People Acuity workshop. It is not a programme that teaches coaching, or co-active leadership (as does CTI) though it does attend to the interactions between individuals, and also to the dynamics between tasks and relationships. In this sense, the content of the programme is connected to the interdependent nature of a co-active approach to leadership, and co-active facilitation actively supports the learning and experience of participants. While the content does differ from CTI, the context of co-active

leadership within a workshop setting is consistent, making this a first step of application beyond CTI.

Discussions around Co-Facilitator Development are directly related to the Action Research question of 'how to Develop Co-Active Leaders.' This provided an ideal opportunity for me to remind the design team of the models emergent from the Phenomenological phase of this study. Importantly, it also provided a reflective cycle for me to share my learnings and experiences, described at the beginning of this chapter, relating to facilitator development and the unsuccessful application of Co-Active Leadership. To integrate these insights, we began by seeking to understand interdependent leadership and what this meant for developing facilitators.

Learning from the Descriptive model and from my personal feedback about my (perceived) authenticity as a co-leader, the design team identified the importance of working with the **Individual Leaders** and their mindset to be able to **commit** to a co-active/interdependent form of leadership.

Given the traditional role of Facilitators in working with group participants, we realised that as we viewed shared leadership from a perspective of interdependence, it became clear that were using the term co-facilitation in a new manner which was important to define. Previously we had defined co-facilitation (or co-leadership) as a collaborative and interactive relationship between two individuals who were collectively responsible for the facilitation of a group towards shared learning and task outcomes (Hogan, 2005; Knight and Scott, 1997). What was different now, was that we were seeing co-facilitation as a relational property of the larger system, no longer limited to those within formal facilitator roles and excluding participants. Instead, we saw co-facilitation as a way that facilitators could partner with other facilitators **AND** with participants. In this sense, the willingness of leaders to both contribute

(lead) and listen (follow) extended to their interactions with participants, providing permission and safety for participants to contribute (lead) in addition to their usual role as listeners (followers). This view saw an expansion of leadership sharing from a dyadic subset (pool) of leaders, to involving the entire group in contributing to leadership.

To support this, we identified some key outcomes for the facilitator development program:

- Role Modelling
- The Being of a Co-Leader
- Creating safety to learn

These three points link directly to my experience with the previous facilitator development program.

5.4.2.1 Role modelling

Having experienced difficulties in describing collaborative approaches to leadership, it was important for us to provide a practical and demonstrated example for participants. This gave participants the opportunity to witness and experience the concurrent enactment of leadership, the relational connection and the emergent co-creative dynamics. To do this, the three of us creating the programme designed that we would co-actively lead the workshop, together. As the most complete example of leadership sharing, we decided to involve all three leaders concurrently, and co-actively lead the program.

5.4.2.2 The Being of a Co-Leader

Building upon this, the first day of the programme was designed to focus entirely upon the being of participants. We sought to create an environment of sufficient safety where participants could see themselves as having value to add and would be willing to voice their contributions. This was a day built to support both leading and following, and to nurture a mindset that supported this. As described earlier, co-active leadership cannot emerge if one or more leaders are unwilling to authentically express themselves in service of shared goals.

Developing participants as co-leaders meant that focussing on the individual leaders and their willingness to commit to co-leading was an essential first step. This first day was focussed upon building a safe relational environment that supported the authentic expression of individuals in relationship with their co-leaders and the environment.

5.4.2.3 Co-Leader Support

As we looked to the remaining two days of the facilitator development programme, the focus shifted (slightly) to include more attention to the task of leading activities. While this did include specific teaching components to share structural information, it was based upon an experiential approach where new facilitators gained practical experience leading activities. My previous experience of facilitator development also provided opportunities for experiencing module facilitation, however, the evaluative environment I had encountered, encouraged participants to perform (i.e. to meet standards and to avoid failure), rather than to learn and develop. To address this, we wanted for our facilitators to have fun, to feel safe to make mistakes, and to have a go at something that was new to them. In essence, to be able to bring their authentic selves and to co-create with what was emerging.

Again, the aim was to create an environment of safety where those learning to co-lead were less likely to be self-critical, and thus, more likely to express their authenticity to better support their own creation of a safe learning environment for those they were leading through different activities. Knowing that this was a relational objective of the format we used, we also needed to support new leaders in delivering the task. To do this, we created a structure allowing new leaders to receive support while they were leading. This emerged in the form of an 'Angel on the Shoulder' where another new leader (actually the next to lead) would provide support and play the observer role of a co-active leadership dyad. In supporting the development of Co-Active Leadership, this provided new leaders with the opportunity to lead co-actively while simultaneously slowing down the complexity emergent from unrequested

leader transitions. By encouraging requests for support the active co-leader was able to co-lead without needing to attend to their co-leader, or the co-leadership relationship. Rather they could focus upon the relationship they were creating with students, trusting that their co-leader would be there for the when, and as needed.

In essence, this created a hybrid model of leadership sharing, in that there was a primary leader, who was relationally supported and not alone. From a task perspective, this also allowed the primary leader to leverage the benefits of two leaders as needed. This allowed many benefits of co-leading including multiple perspectives, and back-up behaviours, without having to worry about the complexity of emergent dynamic transitions, or potential triggers from co-creation.

5.4.3 Enacting this Design

While our design of this programme was greatly informed by Co-Active Leadership, our enactment took this to another level where two colleagues and I were able to explore this design, in action. The enactment of this design helped me to integrate much of my learning about the development of Co-Active Leadership. In particular, our practical application of this design helped me to see the integrated and progressive nature of different approaches to co-leadership.

5.4.3.1 Co-Active Leadership Triad

So far, this chapter, and our team's experience of co-leadership included two leaders. For this facilitator development programme, however, we had three leaders who would simultaneously lead together.

While this study sought to explore the leadership dyad as the smallest and thus most simple example of co-leadership, our enactment as a triad was a natural extension, and an important one for application in other contexts. Specifically, a co-leadership dyad consists of two

individuals and their relationship. Adding another person to create a co-leadership triad, increases the complexity significantly. The triad consists of three individuals, three dyadic relationships, and a collective (triad) relationship. Additionally, these relational descriptions ignore the role of the co-leaders and their subsequent interactions with participants individually and collectively.

On the first day of the facilitator development programme, we decided that we would co-lead as a triad with all of us concurrently active. From the systems level mindset of interdependence, we felt that this configuration best reflected the concurrent nature of interdependent leadership. It felt natural for us that if we could co-lead with two, then why not with three. In this, we sought to be co-creative with both colleagues, operating as a connected and integrated triad. The learning that evolved from this was extremely insightful, on many levels and is summarised, rather than elaborated.

Firstly, it worked. The three of us were successful in the concurrent enactment of leadership as a triad. Reflecting on this success through the descriptive model, we were each willing to bring our authentic selves in service of our commitment to co-actively leading. Our design was built upon years of experience with each other and with developing and teaching models of behavioural and relational interdependence. Our relationship was strong and filled with trust and respect for each other and our inherent differences. I share these details due to the uniqueness of this situation. From this strong foundation, we were willing and able to attend to each other, and to create from what was emerging. In those moments when we were triggered, rather than withdrawing from connection, we actively sought reconnection.

Leading in this manner, we created a powerful experience for participants and found the interaction of three co-leaders to be enlightening and rich. It was, however, also incredibly exhausting. For me, I found that having to attend to the complex triad dynamics as well as

everything else that was emerging in the room was too much for us to sustain across multiple days. In other words, the energy required for me to be actively concurrent with two colleagues was a cost that I perceived to be larger than the additional benefits of the third leader. My colleagues felt the same. In response to this, I suggested a blended (hybrid) model of co-leadership involving a co-active leadership dyad supported by the intentional rotation of the third leader.

This blended model allowed us to maintain our co-active style of interdependent leadership, which we felt was essential for participants to witness and experience, yet it also allowed us as co-leaders some time to rest, and to hold a less active role as an inactive observer. This inactive observer was still able to contribute and share perspectives when they served the room, yet they were also in a position to not have to do this. They were not required to be cognitively active, or even connected to other leaders, participants or what was emerging in the room. Creation of this 'inactive observer' role provided sustainability across a multi-day event as we delegated segments and topics to different leader dyads based upon their interests, strengths and energy. In this manner, we found a way to gain the greatest benefits from role differentiation and rotation, while also maximising the additional richness of a co-active style of leadership.

5.4.4 Applying Models & Learning to Develop Co-Facilitators using Co-Leadership

This facilitator development programme created conditions for me to co-lead with some new facilitators who had never co-led, other than what they witnessed or experienced during the programme. Leading with some of these new colleagues gave me an opportunity to explore the use of co-leadership as a tool to develop a co-active style of leadership. While this was a rich journey, some key lessons emerged about how to develop co-active leaders, and particularly that there were some developmental steps which Co-Leadership supports differently.

As with the Facilitator-Development Programme, I began by moving directly towards a fully Co-Active form of Leadership. With a new co-leader, this turned out to be an incredibly ineffective approach. There was so much going on for new facilitators to dynamically interact with and co-create from everything that it quickly became impossibly overwhelming for them. More than this, to position us as equal from the beginning actually seemed to reinforce my seniority within the dyad (given my familiarity with the content), further inhibiting the co-leadership. Seeing this, I realised that I was asking a new facilitator to take responsibility for the entire timeline (all activities), their presence as a leader, how they contributed to support their co-leader, how they allowed and responded to contributions from their co-leader, and to effectively identify and respond to the complexity of participant responses. I had moved directly to Co-Active Leadership, having completely omitted any development. To simplify this development journey, it became clear that there were areas of task and relationship that needed attention.

From a developmental perspective, this was a reminder of the complexity of Co-Active Leadership. Specifically, I reconsidered the initial unsuccessful attempts to initiate Co-Active Leadership and how scripted rotational leadership provided some benefits of dual leadership, while simplifying the relational complexities. I also recalled the success of the blended model we used for the facilitator development programme. As I continued to work with new co-leaders, I sought to simplify their developmental journey to build confidence and capacity for the task of facilitation, and the relationship of co-leading.

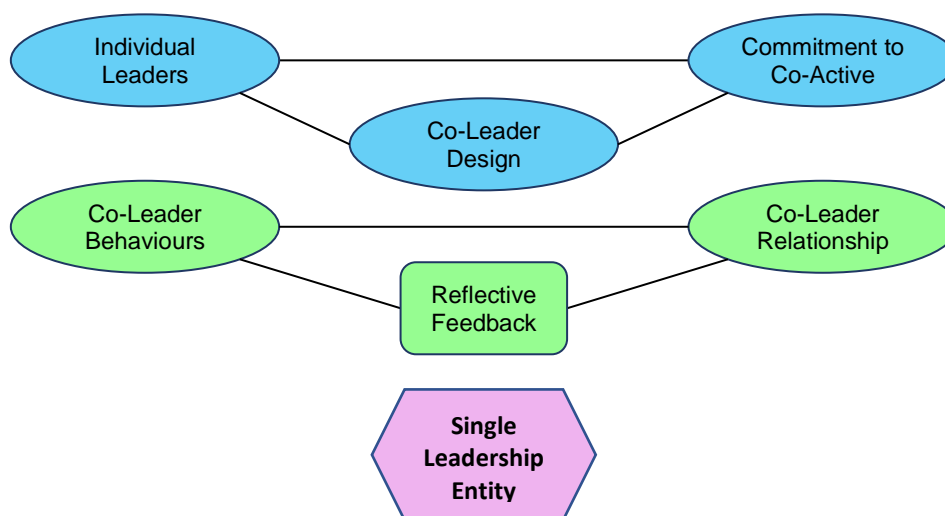*5.4.4.1 Using the Descriptive Model as a basis of reflection*

Figure 2: Visual representation of the descriptive model of Co-Active Leadership described in Chapter 4.

Designing Co-Leadership

Using the descriptive model emergent from the data analysis (shown in Figure 2), I began to

consider the first layer of themes, Individual Leader, Design and Commitment to Co-Active.

In our previous design and approach to co-leading, I saw that my focus had been upon the

relational design and had ignored much of the task. I could see how this had reduced the

safety within our relationship and increased the cognitive load and performance anxiety in

my colleague. Realising this, I changed my approach to our design, redefining how we

described successful leadership sharing (task and relationship), as we sought to create the

foundation for a safe and connected relationship that allowed each of us (and especially the

new leader) permission to express their authentic selves.

In the context of a new leader, this meant accepting that they were new and may not be

familiar with the entire timeline. To simplify this, I began to invite my colleague to select key

activities, perhaps one in the morning and one in the afternoon, for which they could lead.

This encouraged my colleague to become more focussed upon, and familiar with these key

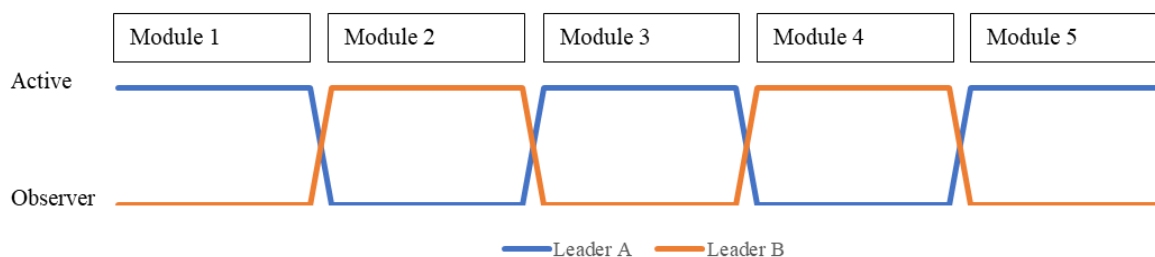activities. In this way our foundational design involved a rotational approach to the tasks of delivery as seen in Figure 3**.**

Figure 3: Visual representation of the Task rotation designed with new co-leaders.

As in a rotational approach to leadership sharing, Leader A and B switch between Active and Observer roles at formally defined intervals, in this example at the end of each module. In doing so, each Leader has primary task responsibility for delivering different modules. During each module, the baseline expectation of the 'observing' leader is to operate as an observer, or assistant in support for the primary (active) leader. This approach differed from more traditional rotational approaches, as the 'observing' leader was also invited, permitted and strongly encouraged, to dynamically contribute within the relationship and what was emerging in the room. And, it was designed that the did not have to. This last agreement was important as it sought to reduce pressure upon the new leader to have to be a certain way, and to help them remain present to what was emerging.

Using the task rotation shown in Figure 3 as an example, the new Leader B would only need to prepare for and familiarise themselves with the delivery of Modules 2 and 4, as the modules where they are scheduled to be more 'active'. By only needing to prepare two modules, we have effectively reduced the cognitive loading for the new Leader B to about 40% of what would be required to prepare for all five modules.

Allowing my co-leader to focus on a small number of activities enabled greater clarity of where and how they would contribute to our co-lead, helping to build confidence and a sense of contribution. Additionally, not being required to lead other activities allowed my colleague to let go of trying attend to the task, helping to increase their relational presence and attention, resulting in co-leaders who were more willing to co-lead during these activities. The power of the hybrid model is that it combines the role clarity of the rotational model, allowing a new leader clarity and focus, with the dynamic relational interactions, and the space for new leaders to learn how to do this. Figure 4 conceptually reflects the dynamic and interdependent interaction that emerged between the two leaders as characterised by frequent and emergent transitions between roles.

Seeing this reinforced the importance of task clarity in building relational safety, because when I expected co-leadership, it inhibited collaboration. Conversely, as we let go of the need for co-leadership my colleagues were better able to co-lead.

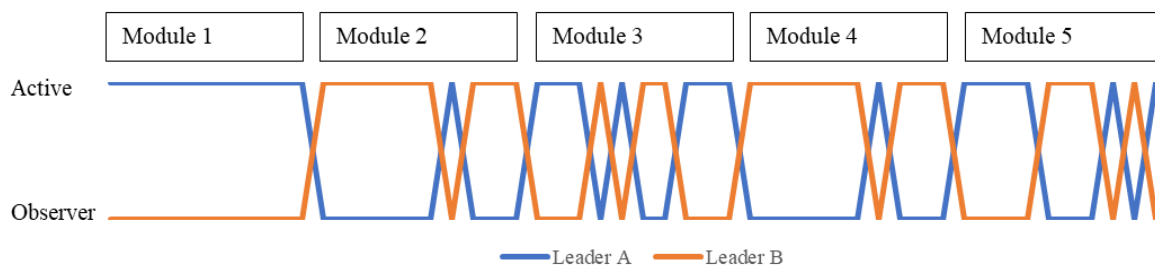*Figure 4: Visual representation of Relational transitions emergent with new co-leaders once we clarified task rotation.*

Enacting Co-Leadership

Soon after this realisation, I was able to work with the same new leader every day for two weeks. This intense period of delivery allowed me to accelerate my understanding of how to support a new co-leader in the enactment of Co-Active type leadership.

Having now understood how to build a positive foundation by integrating a rotational task design to support the relational co-leading, we were more able to focus our attention on enacting the Co-Leader Relationship, Co-Leader Behaviours and integrating Reflective Feedback. Attending to these areas allowed me to see how much of my attention was focussed in helping my colleague to bring more of herself into the lead. In essence, we had done a great job in creating alignment and connection and so found ourselves attending to what would help her to fully co-create.

Each day that we worked together, we held a different developmental focus. Having observed her on the first day, I saw that the initial place for her to focus was on her presence as a leader. As this improved, we moved onto how she contributed her voice and listened to her intuition, contributing to the co-lead. This day was most important for my learning as there were many times when my colleague brought her voice in such a manner that interfered with, rather than supported participant learning. While my first thought was to provide immediate feedback and correct this behaviour, I realised that she had done exactly as we had designed, she had brought her voice. This meant that my response to her contribution needed to both support her continued contributions and simultaneously realign the group. It was especially important for me to not judge what she had done as wrong, and to remain focussed on responding to her in ways that increased her contributions. As I considered this, her misaligned contributions were actually an expression of authenticity and significant progress from the day before because it meant that she was not waiting until she was perfect to contribute.

I brought this awareness into subsequent co-leads as we added attention to the impact of her contributions, and then to activity transitions. This progressive development moved quite quickly due to my colleague's responsiveness, however I could see this needing to move at

the pace of the new leader, as moving too fast could negatively impact safety and the willingness of the co-leader to bring their full selves.

5.4.5 Integrating these Insights: Outlining Interdependent Leadership Design

Reflecting upon this journey, the descriptive model was a useful foundation to separate the design from the enactment of Co-Active Leadership. While the theme of Co-Active Design includes task and relationship, the hybrid model showed that the design of these areas can be different. Holding task as rotational provided a framework for new leaders to learn the task, while practicing the relational dynamics of enacting Co-Active Leadership.

Integrating everything I had learned about Co-Active Leadership and co-leading, I found myself describing the progressive nature of how leaders can interact with each other. This structural flow was informed by, and aligned with, what I had read in the literature (Cook and Friend, 1995; Friend et al., 2010). What was different with this list of structural approaches was the potential for the progressive nature of their involvement with developing Co-Active Leaders.

1. Leader and an observer
2. Leader and an assistant
3. Alternate or rotational Leadership
4. Teaming or Co-Active Leadership

Beyond this structural progression, there was a consistency in how I was viewing the relational component to integrate my learning around OFF leadership. Looking at this list I could see how the first three could be enacted by structurally (task) connected, yet relationally independent individuals, while Co-Active Leadership (teaming) requires the leaders to be connected in relationship as well as in task. Beyond this, I could also see how each of these configurations could also be enacted by relationally connected leaders. As such,

I saw my language shifting from discussing Co-Active Leadership which was relationally general, yet structurally specific format, to one of interdependent leadership.

Interdependent Leadership

This phrase seemed to better reflect the interdependent and dynamic nature of co-leader interactions and it was, therefore, applicable to all structural formats. In discussion with colleagues, it also became clear that with Co-Active Leadership being seen as a very integrated and advanced form of interaction, using this phrase seemed to set unrealistic expectations that acted to inhibit its very expression.

5.5 Chapter Conclusion

All told, this has been a rich and rewarding journey filled with both action and learning. I have faced many challenges: as a Co-Active Leader, a researcher and as a person; from which emerged many insights about myself and Co-Active Leadership. With action research holding "the explicit intention of bringing about change through the research process", it is important to summarise some of the changes that emerged across this project (Raelin, 1999, p. 116).

Seeking to apply this knowledge has helped me to grow as a practitioner. It also challenged me as the feedback I sought shook my understanding of myself and pointed me to an important distinction between task and relationship. Personally, I had been very strong from a task or behavioural perspective. Yet, the very personal feedback I received about others wanting more, and how I was perceived in relationship, challenged this understanding and forced me to see myself and my role in new light. This personal journey allowed me to see the importance of creating relational safety for my colleagues and how I can be and do differently to support this, both essential steps for the development of other leaders.

As I have grown as a scholar practitioner, I have capitalised on opportunities to influence other leaders and organisations to be more co-active, both successfully and unsuccessfully.

The unsuccessful attempts brought with them insight and knowledge that supported the subsequent successful implementation. More than this, however, this study has supported the internalisation of a Co-Active style of interdependent leadership within another organisation. This application does not merely duplicate what CTI does so well, it provides strategies to close the gap between traditional hierarchical forms of leadership, or independent application of rotational leadership, and begins to build interdependence and the emergence of a more relational, co-creative form of leadership. This approach to leadership has now been used to develop interdependent leadership in a new organisational context. Co-leadership has now been applied, tested and integrated into the systems of facilitator development for people who had no previous experience with CTI.

More than this, it also highlights the power and strength of Co-Active Leadership and it becomes clear why CTI has maintained this form of leadership for over 25 years.

This chapter has extended upon the Discussion of the phenomenological exploration in the previous chapter by adding to it the lived experience of further application. This application has also tested and extended my understanding of Co-Active Leadership, and specifically, how to support its development. The next chapter continues to summarise the research journey and to bring the research narrative to conclusion.

Chapter 6: Conclusion

6.1 Introduction to the Conclusion

This research emerged through personal experience with Co-Active Leadership that saw it as a practical and successful example of shared leadership. In a world moving from mechanistic linear business models of predictability and control, to organic, complex models of intelligent agents functioning at a systems level, forms of shared leadership are becoming increasingly relevant (Marshak and Grant, 2008). Shared leadership moves focus from leadership residing within a single leader, shifting it to the level of the system. While this change in thinking is reflected in many fields, leadership development in organisations and research maintain a strong focus upon the development of individual leaders, often assuming that as leaders grow, so does leadership (Day, 2000).

In this context, I experienced Co-Active Leadership as an approach that both reflected, and would serve, this transition. In my work with CTI, I came to see their model of dual workshop facilitation as a specific example of shared leadership. Moreover, this model seemed to reflect the complex, systemic nature of organisms, while also supporting the development of leaders and leadership beyond the dyad. In essence, it seemed to be a form of leadership that better reflected the styles of leadership emergent within complex systems.

Anecdotally, workshop participants experience Co-Active Leadership as having an amazing and profound **impact**, while being virtually impossible to **describe** to those who have not experienced it. Yet, if the impact was as positive as people explained, how could this form of leadership be implemented in other contexts if it remained something 'you just have to experience for yourself'?

As a scholar as well as practitioner, it was clear that Co-Active Leadership needed further exploration, and this study sought to provide evidence to confirm or correct these views.

Greater understanding could then support the development of Co-Active Leaders and Leadership while providing insights into how to bring this form of leadership to new contexts.

In looking to apply Co-Active leadership, this study first sought to understand:

- The impact Co-Active Leadership has on groups and **<u>why</u>** this is an important form of leadership
- **<u>What</u>** Co-Active leadership is, and
- **<u>How</u>** we can support the development of leaders to be more 'co-active'.

Using a phenomenological approach, this study provided a rich description of Co-Active Leadership and its impact on participants and leaders. It also allowed the emergence of a descriptive model that was confirmed and reinforced through action research cycles, subsequently proving instrumental in the development of a Co-Active style of Leadership in new organisational contexts.

This chapter provides a conclusion to the study, summarising how this research serves contemporary thinking and my organisational environments. This is followed by consideration of the extent to which the research aims have been achieved and the limitations of this work. As with any study, reliability and validity must be considered, and future direction outlined.

6.2 Level of Success in Achieving Stated Research Aims

This research has achieved many of its intended aims. First, and foremost, this was an exploratory study into understanding Co-Active Leadership seeking to describe what it is and its impact. In this sense, this study was able to emerge and categorise a rich and broad description of the impact of Co-Active Leadership, both from the inside (Leaders) and from participants and assistants, on the outside. These perspectives also helped to describe the behaviours and relationship between the two leaders at multiple levels of analysis to see the

emergence of the Single Leadership Entity. The essence of Co-Active Leadership is the behavioural interdependence expressed by both leaders to emerge the Single Leadership Entity. Beyond this, the study also identified and described when Co-Active Leadership was not working, OFF Leadership. This was a useful extension to the research, as it presents some data on the volatility of shared leadership and the significantly negative and challenging impact of having two independent and unconnected leaders.

Practically, the insight from the phenomenological research helped to inform and guide application to create meaningful organisational impact. These in turn, helped to verify and deepen the understanding of this form of shared leadership.

6.3 Contributions of this Research

Firstly, a review of diverse literature showed that the co-facilitation of workshops is a form of shared leadership. Literature into shared leadership, co-teaching and co-facilitation are aligned on how multiple individuals come together to lead and influence others towards a common goal, albeit across different environments. While co-teaching and shared leadership have been seen as separate, the expression of leadership in different environments does not preclude it from being leadership. As shown in this study, the exploration of shared forms of teaching, may actually be an ideal context to explore the dynamics of leadership sharing.

In describing Co-Active Leadership, this study identified a multi-level model of leadership sharing with connection to diverse research areas including leadership theory, teaching, educational leadership and psychology. The integration of these diverse research bodies shows Co-Active Leadership is more than an approach to teaching, it is an example of shared leadership.

Exploring Co-Active Leadership provided the opportunity to better understand the dynamics and interactions of two leaders as they came together to form what was described as a single leadership entity.

This study has shown that when two leaders come together and form a single leadership entity, the experience is one of rich connection, learning and relational safety. Participants found themselves more open to learning, particularly about themselves and each other, because co-leaders created a group environment of safety, openness and curiosity. This impact supports both leader and leadership development as the experience of Co-Active Leadership allows participants to redefine their implicit understanding of leadership as a concept. As they witness two leaders successfully operating as one, the emergence of a mindset allowing multiple leaders is supported. This is a significant shift in implicit definitions; from leadership belonging to a single, hierarchical leader to becoming a relational and systems construct.

As individuals experienced co-active forms of leadership, they were more open to the dynamic interactions of concurrent leadership and could begin to move towards behavioural interdependence where they could dynamically co-create with their co-leaders. The associated change in mindset and implicit understanding of leadership were seen as important steps in the development of co-leadership, specifically impacting the capacity of individuals to share leadership, and the configurations available to them.

Exploring Co-Active Leadership when it was Off allowed the identification of three triggers which, when present, led to the dissolution of the Single Leadership Entity, and reinforced the individual roles of the leaders. These triggers related to Ego, Hierarchical Differentiation and Misalignment, and each reflects a change in connection between the two leaders.

The descriptive model, supported by action cycles, showed the importance of the individual leader in the subsequent emergence of a leadership dyad. This model described the individual leader and their willingness to be open and authentic, allowed the expression of their full range. This individual range, however had to be expressed within the co-leader relationship and was supported by both a Co-Active Commitment, and a Co-Leader Design attending to both task and relationship.

Using these models, the development of leaders began with a focus upon the individual leader. Attempts to move directly to the dynamic complexity of a fully co-active style of leadership tended to overwhelm and trigger new leaders, inhibiting, rather than supporting their growth. However, using task rotation allowed a focus to be placed upon the individual leader and helped them to feel safe within the co-lead relationship, removing judgement and fear, then co-leadership began to emerge. Supporting this was a balance between the co-leadership relationship and tasks, which enabled the emergence of a hybrid configuration of leadership combining the clear role differentiation of rotational forms, with the relational connection, safety and emergent dynamics of a Co-Active form.

This hybrid model showed that in the development of shared forms of leadership, there are different forms of sharing. Additionally, these different models can vary in their concurrent enactment, power balance, and connection. When these three dimensions are integrated with different configurations then leaders can be supported to develop towards formats of increased behavioural interdependence.

6.3.1 Contribution to models of shared leadership

This study had the opportunity to compare two models of leadership sharing, rotational and Co-Active, and eventually, a hybrid of the two.

As mentioned earlier, the world is moving from a linear, command and control view to one that is responsive to greater fluidity and complexity. Pre-determined rotational leadership uses linear thinking to increase leadership sharing through role rotation. It is more collaborative than a single leader, yet maintains the view that leadership resides within a single individual. The strength of this approach lies in the clear allocation of roles and points of rotation, providing structural or task clarity. Over time, this leverages the **benefits of 2 leaders** for awareness, maintaining interest and energy as well as availability to for back-up behaviours. However, its ability to adapt to complexity and rapid contextual changes is limited to the individual responsiveness of the primary leader.

Interdependent forms of leadership provide a complex, relational response to leadership which is intended to adapt and create from emergent complexities. The strength of this approach lies in the relational connection between co-leaders which allows each of them to bring their unique authenticity in service of aligned goals. This relational strength provides access to a greater range of momentary responses allowing co-leaders to integrate subtleties of the emerging situation, thus co-creating more richness and inclusivity. The challenge, however, lies in creating, maintaining and reconnecting the safe relational environment co-leaders have with each other and themselves.

As our understanding of organisations and leadership theory evolves, so too must our leadership responses. Co-Active and behaviourally interdependent leadership is an option that can effectively respond to and create from inherent increases in complexity, and one that has proven itself to be sustainable and transferrable. More than this, however, by providing opportunities for individuals to experience these forms of interdependent leadership, it becomes possible to change intrinsic leadership definitions to allow and nurture more collaborative and relational forms of leadership in organisations.

Developing leaders and leadership to remain present and responsive to complexity is not likely to be a linear process. This study has shown that it is a journey that begins with the self and one's understanding, or mental model, of leadership. Where leadership definitions are linear and hierarchical, leadership sharing is possible based upon role interdependence and rotation. Where leadership definitions are relational, sharing is leadership because this serves the collective goals.

The emergent hybrid model provided an intermediate structure to support the development of co-leaders. In this, task interdependence and role rotation were engaged to simplify the task for new co-leaders. Added to this, was the relational connection and safety to support the emergence of behavioural interdependence which provided the opportunity for rich emergent co-creation. In bringing both, the hybrid model was able to bring the best of each configuration to create relational safety and flexibility while supporting task clarity and preventing overload.

While this is a structural description of the development of leaders, the relational component must also be addressed. Attempts to develop others only really became successful when I let go of controlling our relationship. Specifically, as I released my personal vision of what success looked like and how to achieve it, I became more willing to co-lead with my colleague in the activity of developing them. Development then, is not something done to a leader, rather it is something that should be co-led with them. Retrospectively this makes sense and my initial assumption reflected the paradox of leadership development seen within the literature where the content of development is different from the experience. This study has clearly shown that the content and experience need to be aligned to support the effective development of leaders and leadership.

6.3.2 Volatility of Leadership Sharing

This study has shown that leadership sharing can be quite volatile. 'When it is good, it is very, very good, and when it is bad it is horrid'[1]. It has also shown that rotational leadership may be a perceived solution to this for contexts or individuals who are seeking to increase leadership sharing. Creating role interdependencies and rotating leaders brings the benefits of co-leadership without needing to rely upon a strong relational connection between co-leaders. This, however, is only a first step. With experience, rotational co-leaders can approach co-active and behaviourally interdependent forms of leadership if they are willing and able to hold the right mindset and express authenticity and humility in relationship. The action cycles focussed upon leader development highlighted that this progression helps provide safety for them to learn about the task and relational dimensions of co-leading.

Without this willingness and safety, however, rotational leadership defined solely through task, is, at best, a limited approximation of what is possible with leadership sharing. Unfortunately, it is also a form of leadership that, while progressive, could actually reinforce the hierarchical definitions of leaders that created this paradox in the first place.

When integrating the triggers of Off leadership, ego, hierarchy and misalignment, Rotational Leadership can continue to operate with two of these three triggers. Some might say this is evidence of the robustness of the approach, and in many ways, this is correct. It is also why rotational leadership is a perfect stepping stone to developing a co-leadership that is truly collaborative and co-creative, to build the teamwork of leadership. Inherent in this behaviourally interdependent form of leadership is the multi-level empowerment of each individual and the dyad. This form of leadership is truly systemic.

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[1] Adaptation of a poem by H.W. Longfellow, "There was a Little Girl".

Overall, this study evolved beyond Co-Active Leadership to explore the behavioural interdependence of leaders in what they were doing and how they were being with each other. Co-Active leadership has been shown to be a successful and sustainable approach to leadership sharing with significant benefits to all involved. It is also a configuration that has advanced beyond other models of sharing because of its strong reliance on relational connection and alignment and the importance of authentic individual expression.

The essence of this development is towards greater behavioural interdependence. This is where two individuals can build a relationship that allows the expression of their unique differences to create strength and connection, rather than disconnection or competition. It is a way of being in relationship without judgement that allows for intuitive expression of self-in-relationship, knowing that your co-leader will accept, and build upon your contribution. It is a place of team flow where two become one in service of aligned goals.

This development of leaders requires an implicit definition of leadership as an emergent quality of connected and aligned individuals. It also requires the development of leaders who are willing to both lead and follow; often simultaneously. It requires leaders who are willing to trust themselves, their colleague and the co-leadership dyad, in order to be present and co-create with what is emerging in the situation and to let go of planning and controlling responses before they happen.

6.3.3 Organisational Impact

The organisational impact of this study has been documented at multiple levels as the above insights have been implemented. At the individual level, I have evolved as a Leader & developer of Co-Leaders both with CTI and in other organisational contexts. My personal understanding and ability to co-lead has grown, as have my approaches to building relationship with new leaders to help them give themselves permission to co-lead with me.

This personal development as a co-leader has helped me to integrate co-leading into People Acuity systems. This co-leading has been implemented on multiple occasions, one of which utilised a Co-Leadership Triad showing that behavioural interdependence can operate with the increased complexities of three concurrent leaders. This experience also highlighted the energetic costs of such complexity and reinforced the benefits of a hybrid configuration utilising both leader rotation and behavioural interdependence. Co-leading has subsequently become embedded into both client deliveries and internal systems to ensure alignment between who we are being and what we are doing as a company. More importantly, as a company we now understand the importance of a co-leadership approach and have applied insights from the descriptive model to actively development facilitators with an initial focus upon the mindset and understanding of our facilitators, to help them create success for both tasks and relationships.

6.4 Reflecting upon Rigor

In all research, questions arise as to the rigor, or trustworthiness of the research. In a qualitative study of this nature, trustworthiness is often defined through establishing the credibility, dependability, confirmability and transferability of the study (Creswell, 2013; Guba and Lincoln, 1994; Shenton, 2004). The trustworthiness of this research was attended to at many different levels.

Credibility relates to the congruence of the research with 'reality' inside the research context (Creswell, 2013; Shenton, 2004). Credibility began with interviews designed to support voluntary participation and were structured to build trust and safety with those interviewed to allow them to fully articulate and share their experiences. Interview participants were given the opportunity to review the transcripts of their interview and to suggest additions or adjustments to the transcription to ensure the accuracy and relevance of their experiences. Beyond this, the research results were also summarised and shared with participants and

Leaders, providing them with an additional opportunity for comment and to ensure that the summarised work retained connection to and expression of the essence of Co-Active Leadership in their experience.

Dependability refers to the repeatability of the study to gain similar results. This was addressed by through inviting interview volunteers from different time periods, different experience of Co-Active Leadership, and across all five workshops in the series. This broad sampling was supported by the inclusion of participant, assistant and leader perspectives on the topic. The use of multiple perspectives allowed opportunities for divergent views to emerge and added to the richness of data collected.

To ensure confirmability of this research, multiple other stakeholders were involved, during the data collection and analysis phases. One key role was that of my external supervisor, who provided an opportunity for me to articulate my thinking, to have my thoughts and assumptions questioned, and to ensure the project made sense to someone who had not experienced the topic of research. These cycles of questioning and reporting increased my attention to and awareness of my role as a researcher and helped to focus more upon what was being said by interviewees, and less upon what I may, or may not have been hearing. The involvement of colleagues and multiple opportunities of participants to contribute to the research as it progressed, also helped to ensure the voice of participants was represented in the analysis. This was a primary reason in sharing research results with diverse stakeholder including those interviewed, international Co-Leaders with whom I had worked during the research period, and colleagues from other companies who had experience with Co-Active Leadership. Multiple action cycles to implement and develop Co-Active styles of leadership also provided support to the emergent models. In all, this helped to ensure that the reporting of this study reflected more than my personal understanding and also matched the

perspectives of, or could be understood, by others who had not been involved in the research process.

Taking the research beyond those interviewed, I also shared research summaries with co-leaders with whom I led during the research period. These individuals were experienced Co-Active Leaders who were living in other countries. Because they were not interviewed, these colleagues were able to provide an external perspective to the research, helping to reinforce its generalisability beyond the geographical location of the research setting (Dubai), and beyond our co-leads to include their entire careers of co-leading. Importantly, however, the transferability of these research data was supported by the diverse experiences of these leaders having delivered in different languages, countries and cultures.

The external application also supported the transferability of the research. This research was practically tested beyond the organisational setting within which data was collected through the successful implementation of Co-Active Styles of leadership within People Acuity and the use of emergent models to inform Facilitator Development. Importantly, these other settings also demonstrated that people with no previous exposure to Co-Active Leadership are able to become more interdependent in their approach to leadership.

This said, now that a co-active style of leadership has been demonstrated in two similar workshop settings, further research is needed to explore its relevance in other contexts.

6.4.1 Limitations for Interpretation of Results

While useful for an exploratory study in this context, the combination of action research and phenomenology provided some limitations to this research. This was especially relevant as I, as the researcher, was also a co-leader on all of the courses from which interviewees were invited. While multiple sources have been used to verify the accuracy of these descriptions, the methodological structure used, still raises some questions as to which parts of the

impact/description are related to Co-Active Leadership in general, and which parts relate to a particular Co-Active Leadership dyad, where I am one of the co-leaders.

This research was conducted within a very narrow research context of Co-Active Leadership within a workshop setting. While the action cycles showed that the essence of this form of leadership can be applied in different, though similar contexts, both are examples of workshops where the content is connected to this form of leadership.

In this manner, the content of the programme was teaching principles related to the form of leadership used to facilitate. In part, this may have contributed to the depth and richness described by participants as they had the course concepts modelled for them in addition to their own learning experiences. Additionally, this alignment of content and leadership may have also facilitated the acceptance of participants and their openness to this style of leadership. This, however, seems less of an issue given the emergence of OFF Leadership where the content remained aligned to Co-Active Coaching, yet the leadership and its experience was significantly different, opposite, in fact, of when Co-Active Leadership was 'working'.

As discussed by Fletcher et al. (Fletcher, 2003; 2004; 2007; Fletcher and Käufer, 2003), shared leadership is post heroic in nature and much more connected to the feminist agenda, yet as a male leader and researcher in this study, my gendered presence may have influenced the range of possibilities experienced by participants. Participants did experience male-male and male-female leadership dyads (and female-male leads if seniority is to be read in word order), yet the most recent (i.e. proximal to the interview) experience of participants was never female-female. In their lifetime experience of Co-Active Leadership, some participants had experienced female-female leads, so this experience is likely, though not explicitly part of the current narrative. While an important consideration, this also adds some support for the

current study due to the clarity with which the relational components of Co-Active leadership emerged, in the presence of male leaders. This does point to an opportunity for future research to further explore this concept.

6.4.2 Limitations for Application of Results And Future Study

When considering the application and relevance of this research, one limitation is the narrow contextual application explored during this study. While an important first step, the current application has been limited to contexts that are fundamentally similar to those of CTI. Further study is needed to explore application beyond a workshop to include organisational settings and complex leadership environments. Future research is required to explore where and when Co-Active and interdependent forms of leadership are relevant. This becomes especially important in the broader field of leadership development within organisational settings.

When considering the global application of this research it is important to consider the Cultural context within which it is applied. Dubai is a multi-racial, multi-cultural environment, which was reflected by the diversity of leaders and participants. It is possible that this multi-cultural environment supports greater openness than more homogeneous environments. This is something to be further explored as Co-Active and interdependent forms of Leadership are investigated in contexts defined by less diversity. CTI is a US based company and operates in multiple Countries using this same leadership model, and their programs are attended by participants from all over the world, yet, the descriptions of Co-Active Leadership emergent from this study still need further exploration and examination in different global and cultural settings. This may also include the exploration of these emergent models and their applicability to programs run in languages other than English.

With the successful delivery of the facilitator development programme to develop co-leaders in the Philippines, it provided an opportunity to consider the cross-cultural relevance of this work. It also raised important questions about the impact of national cultures on a relational form of leadership sharing (Hofstede, 1984; Holten et al., 2018; Whetten, 2009). Hofstede (1984) identified four dimensions of cultural difference. These relate to "Individualism versus Collectivism", "Large versus Small Power Distance", "Strong versus Weak Uncertainty Avoidance", and "Masculinity versus Femininity" each of which feel related to interdependent forms and definitions of leadership (Hofstede, 1984, p. 83). Further exploration is needed to determine the impact and relevance of Co-Active forms of leadership in various global cultures (Hofstede, 1984; Liu et al., 2014).

6.5 Additional Research Directions

While this research answered some questions, it was intended as a first step to enhance the development of leaders and leadership, particularly in organisational contexts.

The initial design of this study included video recordings of Co-Active Leaders in action. Due to the richness of interview data the analysis of video footage was omitted from this study. This provides an immediate opportunity for future study. Such footage would provide data to practically explore the models emergent from this study to better define the dynamics of co-leadership. Beyond the recording of experienced leaders, this approach could be extended to recording the development journey of new leaders to better understand the process of development.

When considering the broader application of this study, Pearce (2004, p. 55) points towards the ongoing exploration of:

> "(1) when is leadership most appropriately shared? (2) how does one
>
> develop shared leadership? and (3) how does one utilize both vertical

and shared leadership to leverage the capabilities of knowledge

workers?"

The hybrid model of role and behavioural interdependence emergent from the application of

this study during action cycles may form a useful structure to explore this third question.

The direction provided by Pearce (2004) remains relevant for future research on Co-Active

and Interdependent forms of leadership. This research would explore the integration of these

forms of leadership into organisational leadership development programs, to explore both a

new context, more fully integrated into companies, and in the delivery of different content.

More importantly, the models emergent from this study can be applied to explore other forms

of leadership sharing within organisational teams (i.e. beyond the classroom).

The impact of experiencing a Co-Active Style of Leadership on implicit leadership

definitions deserves further attention. Further study could explore process of redefinition and

its practical relevance to the application of leadership sharing. This mindset is connected to

the development of individual leaders to be willing and able to express their full, authentic

selves within the co-leadership relationship. These psychological constructs deserve further

attention in how they support the enactment of leadership sharing, and how their development

enhances both leaders and leadership.

As I frame these questions, my mind turns to the cognitive development theories touched

upon in the introduction and their view of leader development across a life time. Given the

leader focus, this raises questions of how this view of leader development connects to the

development of leadership and its sharing. As well as their relevance to support leaders in

minimising the triggers of OFF Leadership such as ego and hierarchical differentiation.

This research direction would support the integration of co-active styles of leadership into

leadership development approaches to begin to prepare the organisational leadership pipeline

for more interdependent leadership approaches, and to prevent the leadership development paradox (Fletcher and Käufer, 2003).

The exploration of OFF Leadership raises further questions about how these dimensions relate to leadership in general. Particularly, how these triggers can be avoided and mitigated by structural alignment, as was seen in the emergent hybrid model used for developing facilitators. More than this, however, it raises questions of recovery and reconnection, especially as the expression of triggered behaviours can be an amplifying trigger for the co-leader leading to a negative, disconnecting spiral. Co-leaders must also understand the personal and interpersonal steps to reconnection. This would include insight in how to recover when personally triggered, as well as to help others reconnect as they are triggered. Further research on how to recover and reconnect supportive co-leader relationships will be important to the effective implementation of these forms of leadership in organisational settings.

The insights around OFF Leadership emergent from this study were useful in understanding how Co-Active Leadership falls apart. Further study is encouraged to explore how these concepts are related to situations of dysfunctional leadership or team conflict. Connected with the above listed research to reconnection, this could become integral to organisational team building.

Finally, this research presented an initial comparison of rotated co-leadership and Co-Active Leadership. Directly contrasting these (and other) configurations would be useful in better understanding the sharing of leadership. Further exploring the impact and benefits of behavioural interdependence could become part of the exploration to identify differences in the being and doing of leaders in each of these formats of leadership sharing.

6.6 Closing Remarks

Having seen Co-Active Leadership as a solution to facilitate the development of leaders and leadership while exemplifying concepts of shared leadership, this study sought to better understand Co-Active leadership to support its application into new settings

The phenomenological study provided a rich foundation of understanding and brought clarity to the impact Co-Active Leadership has on participants and leaders. These rich descriptions matched other descriptions in the literature from research into shared leadership, education and teaching. The descriptive model provided a multi-level view into Co-Active Leadership which helped to both understand Co-Active Leadership and to distinguish it from other forms of leadership sharing, i.e. rotational leadership.

The Action Research cycles provided depth to these models where they were tested and practically applied to implement Co-Active forms of Leadership and to support leader development. These cycles showed that both task and relationship are essential components and that the complexities of each can be minimised through the use of hybrid configurations utilising both role and behavioural interdependence.

Attempts at increasing the co-activity of leadership also highlighted the importance of leader development. Implicit leadership definitions must support the concurrent sharing of leadership. Individuals must also be willing and able to express authenticity and humility, as well as this being a focus for relational design.

Overall, this study has been able to document the essence of a form of shared leadership that has been successful for over 25 years. In doing so, it has identified the importance of both task and relationship and how these can be used to create an interdependence that can be present to and respond to situational complexities. This study has also shown that this form of leadership closes the paradoxical gap of leader development by aligning both content and

experience. It also points to future directions for both application and research to expand our

understanding of leadership at a collective level.

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