PUTTING VALUES INTO PRACTICE: THE ROLE OF MORAL AND ETHICAL VALUES IN PLANNING A LEADERSHIP TRAINING PROGRAM

by

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ABSTRACT

In program planning there is a wide variety of planning models, frameworks and philosophies that guide the actions of planners. This study was undertaken to observe how a certain perspective on program planning influenced the planning of an adult education program. The location for this study was the Meeting the Leadership Challenge (MLC) program, which is an executive education offering designed to teach leadership skills to mid to upper-level executives.

This goal of this study was to observe what considerations guided instructors in the planning of the MLC program, and to determine to what degree these considerations reflected moral/ethical values in addition to or instead of pragmatic/instrumental values. The study involved an examination of a variety of planning considerations evident in the MLC program in order to see how certain types of values were reflected in each consideration. By undertaking this study it was hoped that a greater understanding would be gained into what role values play in the planning process, and how understanding this better might help planners deal with the complex planning environment.

This study is based on interviews with five instructors who were actively engaged in the ongoing planning of the MLC program. The findings that resulted from the interviews were categorized into planning considerations and were located on a values continuum that illustrated the extent to which each consideration was reflective of moral/ethical values or pragmatic/instrumental values.

The study concluded that a wide range of values were evident in the planning considerations, and that the majority of considerations were reflective of both moral/ethical values as well as pragmatic/instrumental values. Understanding more about this distinction can help planners know when considerations that are reflective of certain values can be negotiated,

and when they cannot. These discoveries support the belief about the complexity of the planning environment, and how learning more about the influence values have on the planning environment may enable planners to be more conscious and deliberate in their actions. In particular, it may enable planners to design programs in which their own actions more closely reflect, not only their own fundamental values and beliefs, but also those of their constituents.

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This study is dedicated to my wife, Anna, without whose unquestioning support this for endeavor it would simply not have been possible. I am grateful for all of her advice, inspiration and understanding. I am also appreciative of my sons Aiden and Jacob whose innocence and understanding of why their dad is "still at work" will remain with me forever.

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CHAPTER 1
INTRODUCTION

As an adult education practitioner I am continually fascinated by the breadth and diversity of adult education programs that are available and by how the experiences of participants in these programs ultimately affect learning outcomes. While clearly there are a great number of philosophies and methodologies that can be employed in planning programs, and an enormous range of activities that can be engaged in to assist in the transfer of learning, I am curious to discover if there are some specific beliefs about how planning ought to proceed, that can contribute to successful programs. My primary interest in exploring the planning process is to understand how certain values can influence program design, and ultimately, program outcomes.

The view of planning taken in this study is one that is centred around moral and ethical values in a planning context. Specifically, I am interested in how planners think about and act on moral and ethical values while planning adult education programs. The goal of this research is to understand what role moral and ethical values play in the planning process.

The Literature of Program Planning

Historically, the literature on program planning has not specifically addressed moral and ethical issues. Only in the past 10 – 15 years has the adult education planning literature explicitly addressed the moral and ethical dimensions of planning. Furthermore, the literature has begun to address moral and ethical issues in only the broadest sense, and has not yet provided any substantial insights into this important aspect of planning. While the challenges of conducting this study in the absence of a well developed body of literature may be considerable, it is hoped that one outcome of this study is that it will help draw attention to this area of adult education and encourage others to take up this field of inquiry.

Study Objective

This study explores the role of moral and ethical values in planning an adult education program. In broad terms, this study is centred on the individual values of the planners and on the values that are reflected in their decisions and actions during the planning process. Values underlie a planner's decisions and actions regardless of basis or motivation. Whether values are moral or ethical in character, that is, based on moral and ethical values such as truth, respect or compassion, or based on pragmatic or instrumental values such as cost efficiency, isolation, or practicality, they all act to influence planning decisions and actions. As a result, values play an important role in achieving overall program objectives, and it is important to better understand the influence they have on planning practice.

This study focussed on a specific adult education program that sought to teach leadership skills to experienced executives working in a variety of industries. The program is formally titled, Meeting the Leadership Challenge (MLC). The study sought to uncover the experiences of the group of instructors who are involved in this program in an attempt to determine how moral and ethical values influence their thoughts and actions while engaged in the planning process. The goal was to determine what role moral and ethical values play in the ongoing development and delivery of this program.

This project did not attempt to address any causal relationship between acting in a way that is reflective of moral and ethical values and effective program outcomes. I am not suggesting that understanding and acting in a way that is reflective of moral and ethical values when planning a program will cause a program to be better or worse, but I am suggesting that, if we can observe and identify what influence moral and ethical values have on planning adult education programs, then this can increase our understanding of the role values play in program planning. Understanding how values influence planning practice and program outcomes may allow planners to be more conscious and deliberate in planning, and in particular, to design programs that are as much as possible consistent with their own values and the values of their constituents. As a result, it is important to understand better the ways in which values influence practice. To undertake this study and attempt to address these issues, two research questions were developed.

Research Questions

1. What considerations guided instructors in the planning of the MLC program?
2. To what degree did their planning considerations reflect moral/ethical values in addition to or instead of pragmatic/instrumental values.

The significance of this study is that, by examining the role that moral and ethical values play in a specific adult education planning context, it may increase our overall understanding of planning practice by providing other ways of understanding the complex planning environment. In addition, by observing and understanding better how values influence the planning process, it may help planners better understand their own roles, and the roles of others involved in the process, and this understanding may ultimately lead to improvements in program design and learning outcomes.

Planning Context

Planners work in complex social and political environments and are frequently faced with difficulties stemming from conflicting needs and goals, as well as from a scarcity of resources. As a result, the planning process can be fraught with challenges and conflicts all of which can detrimentally affect the success of a program. To address some of these challenges program planners often turn to readily available planning literature that provides models, frameworks, processes and general guidance to deal with the complicated planning environment. Planners in this sense are equipping themselves with tools that not only help them conduct various planning events, but also help them to better understand the diversity of interests that are typically represented at the planning table.

Understanding how values can influence the planning process is important since it can help avoid potential conflicts. Planners acting in ways that are reflective of their values must be explicit about conflicts that can occur as a result of differing program goals. A program administrator may have as their primary need the financial success of the program, and this may conflict with the participants' primary goal of receiving a quality learning experience. As a result, it is part of a planner's responsibility to address in an intentional and conscious way potential conflicts that might affect the interests and well being of everyone involved in the program.

To assist planners in their challenging roles, this study seeks to provide a way of understanding how different values influence the planning process. To proceed with such an undertaking it is important to first lay some groundwork and discuss both moral and ethical values, and pragmatic and instrumental values, in order to understand their difference, and how they might influence the planning process.

Understanding Moral and Ethical Values

To examine what influence moral and ethical values have on the planning process, it is first necessary to both discuss the meaning of the terms *moral* and *ethical* in a broad sense, and then describe specifically the meaning that has been adopted in this study. Both of these terms are open to a wide variety of interpretations and, in everyday usage, they are often considered interchangeable. However, there are some clear distinctions that have been made by a number of authors that will not only assist in the general understanding of these terms, but will also allow for some specific meanings to be extracted for this research.

In simple terms, moral is defined as, "...fair, just, right, and what we *ought* to do, not necessarily what we prefer to do" (Kroeker 1996, p. 16). It embodies a sense of consideration, reflection and equality, and moral choices can be considered to be defensible and justifiable. As a result, moral decision making is based on some higher order, and based not on what we feel like doing, but on what we feel is the right thing to do.

Ethics is defined by the Concise Oxford Dictionary (1990) as, "a set of moral principles, rules of conduct, the science of morals in human conduct" (p. 401). Ray (1996) defines ethics as, "... a branch of philosophy comprising various moralistic models or schools of thought designed to bring about "good" in a society" (p. 48). Ray (1996) goes on to distinguish between ethics and morality by stating that "Morality can be reasonably defined as a belief in right and wrong that is autonomous, self-standing, and not dependent, as with ethics, on a philosophical rationale for validation" (p. 49). Beck and Murphy (1994) distinguish between moral and ethical by providing the notion that, "ethics provide principles to guide administrators toward morally sound decisions..." (p. 2).

Morality is usually held to be universal, (do unto others as you would have them do unto you) as opposed to ethics whose meaning has become more closely associated with rules of conduct, such as codes of ethics, (lists of rules governing conduct in workplaces, professions, schools, etc.) than to universal truths. However, this study will not consider the term ethics in any sense that denotes a code of ethics or a code of conduct for planning programs. To create such a formalized list of rules would contradict the notion being put forward in this study, specifically that moral and ethical decisions are reflective of individual values, and are not based on specific rules of conduct.

If a list of moral and ethical rules and regulations were developed for planning it would follow that such a discrete and directive methodology could simply be viewed as another interpretation of the technical rational approach to planning or planning from a functionalist perspective. However, this is not to say that codes of ethics are not useful. Sork and Welock (1992) carefully articulate the numerous benefits of codes of ethics for adult educators. Primary among these benefits are that codes of ethics can help adult educators avoid many of the unethical pitfalls they encounter in their work, including those that exist in the planning process.

This work further raises the profile of values in adult education and shows that adult education activities like program planning are not value-less exercises, but rather, are value laden ones where it can be beneficial for those working in the field to share their values with their constituents. As a result, is it useful to pay attention to the role that codes of ethics can have in the planning process. However, in this context, their utility will be restricted to the way in which they bring the values of those involved in the process to the forefront. The perspective that is being put forward in this study is one that has a deep connection to the values and interests of the program's constituents, and as a result, cannot necessarily be understood by adherence to a strict code or set of rules.

While definitions of moral and ethical discussed earlier support the notion of doing "good," they are also problematic in a fundamental sense, since these definitions use the term morality to define ethics, and thus to some extent the definition becomes circular. This condition is also supported in history because, as O'Connell (1994) says, "...in its original form 'ethics' is a word descended from the Greek *ethos*. A further derivation of this word is the Latin *mores*, from which we get 'moral' and 'morality'. As a result, each word has roughly the same meaning; ethics and morality are linguistically and conceptually related" (p. 59). Thus, both the etymology of these terms and their interrelatedness provide grounds for expanding our understanding of their meaning and for being specific about their meanings in this study.

Price (1997) expands on the definition of ethics by framing it as a philosophy that has both a content and process dimension. The content dimension consists of an individual's own system of beliefs, morals, and values relating to what is right, just or good in human interaction. The principles that result from this process ultimately guide an individual's actions. The process dimension relates to activities where individuals think critically about their personal and professional values and beliefs, and then question their assumptions and predisposed views about right and appropriate courses of action. Price asserts that, "One's values and beliefs may be fundamentally shaped by temporal, cultural, political and other contextual influences that may not be accurate and relevant to one's current life and professional context" (p. 1). These situations can result in ethical dilemmas where a planner must either subordinate their own values and beliefs in the interests of the external forces, or rationalize them through a critical process of self-evaluation before taking action.

A recurring theme found in the definitions of moral and ethical that have been stated here, is the consideration of values and beliefs. Price, Ray and Jarvis all use these concepts in their own descriptions of moral and ethical as a way of imparting how the nature of what is moral and ethical is not just a societal construct, but part of an individual's core being. As a result, we cannot easily divorce ourselves from our moral and ethical values when we work in diverse and challenging social environments such as the planning arena. In fact, given the core nature of values in morality and ethics, it follows that our own values and beliefs will affect our planning (and delivery) of educational programs whether or not we are conscious of that influence.

While all of these concepts of moral and ethical contribute to our understanding of these terms, they are not without some limitations. For example, using the term "good" to describe moral and ethical acts can be problematic since what is considered "good" is not uniformly accepted amongst all people in all situations and circumstances. Also, as Jarvis (1997) points out, "good" is often reflective of the views of those who exercise the most power in a society, and this can prejudice the beliefs of the majority to the benefit of the powerful minority.

Despite these limitations, this study uses the terms moral and ethical synonymously, to describe values that, in the context of the MLC program, are representative of values that are generally considered to be intrinsically good and have positive effects on the program participants and learning outcomes. However, it is not the fact that these values may be reflected in planning considerations that have positive outcomes that is their sole distinguishing characteristic. In this context, the importance of moral/ethical values is also that they are considered to have intrinsic value. That is, they are not valued for the sake of their contribution to some desired end, but for their own sake.

In adopting these meanings, it should be acknowledged that the debate on what is considered intrinsic and extrinsic has not yet been settled, and these distinctions described here may not hold up under closer scrutiny. So while it is not universally accepted which values are valued for their own sake, in this study values such as respect, trust, compassion, and safety, are considered to be examples of intrinsic moral/ethical values. Values such as these are considered to be "bottom-line" values and are non-negotiable. For example, if one is to act in a way that is reflective of the moral/ethical value of trust, there is no middle ground that can be negotiated such that it would not conflict with the value itself. Acting in a way that is partly trustworthy, is to act in a way that is not trustworthy at all. As a result, intrinsic values such as these are distinct from values that have a more purely pragmatic or instrumental basis, and for which some degree of negotiation is acceptable.

Understanding Pragmatic or Instrumental Values

Planning activities are not "value neutral" and values underlie the decisions and actions of individuals engaged in the planning process, regardless of their basis. In the preceding section, a variety of descriptions of moral and ethical was put forward as a way to begin to understand how they might be distinguished in the planning process. While these types of values may have significant influence on the planning process, they do not operate in isolation.

Coinciding with moral/ethical values are pragmatic or instrumental values. These values reflect beliefs about what means ought to be employed to achieve a particular end result.

The Concise Oxford Dictionary (1990) defines pragmatic as "dealing with things in a practical rather than theoretical way" (p. 935), and instrumental as, "serving as a means of pursuing an aim" (p. 614). Together, these definitions suggest that values that are pragmatic or instrumental emphasize technical solutions, instrumental efficacy, and on providing a means to achieve an end. In this sense, it is not their specific nature that is of primary concern, it is that they serve as a way to achieve a final end result. Lau and Chan (2005) consider instrumental values to be "extrinsic values", something that is not valued for its own sake, "but because it contributes to some further purpose, or because it helps bring about something else of value" (p. 1). Lau and Chan offer an example of a kitchen knife, which may be considered valuable in an instrumental sense, however, it is valued not for its own sake, but because it can be used to satisfy certain culinary purposes that are desirable.

An example of a pragmatic or instrumental value is cost efficiency. The assumption made is that when such a value is examined, it may have some value unto itself, but it is the end result that is critical. For example, if we act in an cost efficient manner and that action leads to greater outcomes or rewards than we would have otherwise received, then the value in being cost efficient is its connection to a desirable end result. It is this connection to a desirable end result that gives the value of cost efficiency its merit or utility. However, this does not imply that the end result will necessarily be good or positive for everyone involved, as there may be a conflict between who is receiving the benefit and who is bearing the cost.

One negative consequence of increasing cost efficiency may be the reduction in quality of the product or experience being manufactured. In an education setting, a course or program provider may decide that they can become more efficient by doubling the size of a class, while still maintaining a single instructor. Increasing class size may be more cost efficient from the perspective of the course provider, and this may have financial or administrative benefits for them, but this decision may also result in a reduction in the quality of the learning experience for the students. In this instance, the merit in the value of cost efficiency is not universally shared. However, if there was no reduction in the quality of the education received by doubling the class size, becoming more efficient in delivering the education may result in a cost savings to both the administrator and to the students. If this were the case, then the benefits received by acting according to the pragmatic or instrumental value of cost efficiency are shared by parties.

Pragmatic or instrumental values can have a variety of effects on program planning depending on the context and the intentions of the planners. In order to proceed, it is important to be clear about how these values are understood. In this study, I will use the terms pragmatic and instrumental together to describe values that are practical, and are ends focussed. That is, these values will be considered in a way that focuses not on each value per se, but on how they facilitate an end result, and ultimately how they influence planning practice. Pragmatic/instrumental values are not "bottom line" values and they can be negotiated, that is, unlike intrinsic moral/ethical values, it is possible to act in a way that is less reflective of a certain pragmatic/instrumental value without violating the character of that particular value.

If planners understand how their values and beliefs influence planning practice and program outcomes, it may enable them to be more conscious and deliberate in their actions. In particular, it may enable planners to design programs in which their own actions more closely reflect, not only their own fundamental values and beliefs, but also those of their constituents. In addition, it may help planners understand when, and to what degree, negotiation is acceptable, and when it is not. If this is possible, then this has implications for shaping program outcomes and for increasing our understanding of the role values play in program planning.

As discussed earlier in this chapter, planners have access to a wide variety of planning tools to help them with their practice. Before a discussion can be formed around how values influence planning decisions in an adult education program, a discussion of the literature related to program planning and program planning models must first be undertaken.

CHAPTER 2
LITERATURE REVIEW

Program planning is a rich and diverse field that benefits from a multitude of planning models and perspectives from which to understand planning's purposes and processes. These perspectives range from purely technical processes with logically rendered outcomes to other views that are contextually based and focus on the complexities of social and political interactions evident in everyday life.

Within this diversity of planning approaches it is recognized that those involved in the planning process, (e.g., learners, planners, employers, government organizations, etc.) have multiple and often conflicting needs and goals. The multitude of planning models available exhibit varying degrees of consideration for the needs of the groups involved in planning. Some planning models are specifically process oriented and consider planning to be nothing but a predefined series of steps that are established by those who hold the most power. Other more recent models recognize the social, political, financial, and ethical complexity inherent in most planning processes and attempt to provide appropriate footing for all groups involved in the process. As a result of these more recent approaches, the ability to view planning practice with an eye critically focused on the ethics of planning practice has begun to be supported by recent literature. This is not to say that ethics in planning practice has not been important throughout history, but it does suggest that contemporary planning models that consider the social and political aspects of planning, more readily allow for the examination of how moral and ethical perspectives integrate into planning practice.

Addressing moral and ethical values in program planning is not a new undertaking, but it is one that has not been represented well in traditional technical rational planning models. Technical rational planning models tend toward the skills of a technician, who is more focused on following an ordered process to a logical conclusion than on addressing complex social and political interactions. A traditional technical rationalist's view of program planning suggests that effective planning is nothing more than the skillful application of a series of discrete and sequential steps which are to be implemented according to some rational formula to achieve some specific and predetermined end (Cervero & Wilson, 1994). This model's primary focus is on desired results, with a secondary focus on the curriculum's strengths and weaknesses (Boone, Safrit & Jones, 2002). This linear view of planning practice has endured to this day and its historical privileging has been well described in the literature (Adams, 1991; Wilson & Cervero, 1997). This traditional view of adult education program planning theory has attempted to improve planning practice by prescribing a scientifically-based procedural logic of completing certain planning tasks (i.e. assessing needs, constructing objectives, developing content, choosing instructional methods, managing programs, and evaluating results) as a way of optimally ordering and directing planning activities (Wilson & Cervero, 1997).

The technical rational approach privileges process over the needs of the learners themselves. Sork (2000) describes this "Tyler Rationale" as being organized around, "four fundamental questions which must be answered in developing any curriculum and plan of instruction," those which are focused on purposes, content, method, and evaluation (Tyler, 1949, p. 1). While such technical aspects of planning are useful in some circumstances, they are by no means the only factors that need attention in designing programs.

To overcome some of the historical privileging of the technical-rational model and to address its focus on process, more recent planning models have been developed that deal more fully with the social and political aspects of planning. These models contextualize the planning process by focusing on individual human dynamics, thus providing the opportunity to foreground moral and ethical values in the planning process.

The consideration of ethics in the literature on program planning is a relatively new phenomenon (Brockett & Hiemstra, 1998, Caffarella, 2002). Even more recent is the integration of ethics into program planning theory (Sork, 2000). Cervero and Wilson (1994) initiate this integration by contending that planners make ethical commitments when they decide whose interests count and how those interests will be reflected in programs. The Interactive Model of Program Planning developed by Caffarella (2002) embodies the need for ethics in planning practice by stating that, "one of the values on which the Interactive Model of Program Planning rests is that using an ethical approach in making decisions about educational programs for adults should be of concern to all parties involved in the planning process" (p. 75). Sork (2000) outlines a question-based planning framework that, "places ethical considerations at the deepest level of analysis" (p. 178). As a result of the work of these authors we benefit by beginning to understand that the inclusion of ethical principles into the various planning processes helps to both contextualize and problematize the work of a planner. Closer examination of these models begins to shed light on some of these issues.

Cervero and Wilson's (1994) Negotiating Interests model, and Sork's (2000) question-based approach to planning both provide ample ground to examine moral and ethical implications evident in the planning process. The Negotiating Interests model addresses the social and political components of planning, and recognizes that planning is inherently a social activity in which people negotiate with each other in answering questions about a program's form, purposes, content, audience and format (Boone, Safrit & Jones, 2002). Sork (2000, p. 173) recognizes this important shift in planning ideology from the, "techniques of planning to 'the people work of planning'". The Negotiating Interests model captures the essence of this movement as it suggests that the first step to overcoming the problems inherent in the technical rationalist tradition is to, "move planning out of the minds of individual planners and into the social relations among people working in institutional settings" (Cervero & Wilson, 1994).

This model recognizes that programs are constructed by a number of different people with multiple interests, working in specific institutional contexts, all of which directly affect the program's content and form. In this social context power relationships and interests are clearly evident. Thus, power and interests define the social context in which planners act. Cervero and Wilson assert that, inherent in any social interaction, power relationships exist, and it is power that defines what people are able to do and accomplish in any planning situation. Cervero and Wilson add that it is interests that give direction to people's actions in the planning process, and that interests in this context are defined as complex sets of "predispositions embracing goals, values, desires, expectations, and other orientations and inclinations that lead a person to act in one direction or another" (Morgan, 1986, p. 41, as cited in Cervero and Wilson, 1994).

The Negotiating Interests model requires that, in order for a planner to move toward designing a particular program, it is essential that negotiation be the central tool to process the variety of interests that are present. Using negotiation is a critical component of this process, because power and interests act together to move the process from a social arena to a political one. Sork (2000) states that, "Working effectively in the socio-political domain of planning involves becoming aware of the role of power, ideology and interests and how these interact when people work collectively to make decisions about intentions and actions" (p. 177). If power and interest relationships are always at play in the planning process then the politics of planning must be a critical component of effective planning. One could anticipate that in any group process identical power relationships and interests would never really exist since in virtually all organizations power relationships exist by virtue of an individual's place and role in the organization, and it is accompanied by their ability to act in their own interests. It is this power to act and affect change that creates an uneven playing field in the planning process. Even in the instances where stakeholder groups share a uniform set of needs and values, individual interests will always be present and these interests will ultimately affect how each unique individual acts and interacts during the planning process. It is in this sense that, if planning is understood to be a social process, then it is inextricably a political one as well.

The complex dynamics of social and political interaction, the prevalence of power imbalances, and the diversity of interests problematize the role of the planner as they seek to design a single program to serve a diversity of needs. In Sork's (2000) "question-based approach to planning," he builds on the work of Cervero and Wilson by first recognizing the limitations of their work, and then constructs a planning model that addresses needs, interests and ethics, and structures these elements into a practical planning framework. Sork's planning framework is "generic, generative, and derivative" in character (Sork, 2000), and as a result helps to resolve some of the problems inherent in the planning process by providing a framework that can be used both as a guide to planning as well as an analytical tool.

Sork (2000) identifies six general components that are common to most planning endeavours: analyze the context and learner community, justify and focus planning, clarify intentions, prepare instructional plan, prepare an administrative plan, and develop a summative evaluation plan. By focussing on these six components, Sork helps the planner to better understand the planning process. However, even more importantly, Sork assists the planner to understand the integrative elements in the planning process as his framework incorporates the technical, the social-political, and the ethical components of planning. As a result of the inclusion of these integrative components, Sork's framework recognizes that planning not only requires certain skills and competencies, but also that those skills and competencies must be exercised in a dynamic environment that inextricably involves social, political and ethical components.

If planning is reflective, at least in part, of individual beliefs and values, it is not unreasonable to question what the basis for these are. Bolman and Deal (2000) offer some explanation by suggesting that the importance of an individual's beliefs and values is based in part on an individual's basic needs. Although a somewhat imprecise term, they define needs as, "the conditions or elements in the environment that allow people to survive and develop" (p. 62). Bolman and Deal also suggest that some of these needs are intrinsic to one's self (nature) and that others are environmental (nurture). By considering needs, it is possible to see how an individual's beliefs and values are formed and to understand how they fit into an organizational context where the needs of the individuals must co-exist with the needs of the organization.

This diversity of approaches suggests that there is no one or single best way to plan programs, as surely this decision is entirely dependent upon the participants, the circumstances, the context of the program, and the skills of the planner. However, it does clearly suggest that planning is not a simple straightforward process. Recently developed planning models focus more closely on individual values, and I believe this is a positive step because by including values into the planning process, it may be possible to develop programs that are more meaningful to participants and this may lead to more effective and productive learning outcomes.

While the literature on program planning provides us with a considerable array of tools for planning, it does not provide us with any specific guidelines to deal with moral and ethical values that can be applied in any uniform way. To overcome this challenge, or to at least in part inform it, this study was undertaken to better understand the role that values play in program planning.

CHAPTER 3
METHODOLOGY

This study explored the role that moral/ethical values had in planning a leadership training program. The project involved an examination of the values that each instructor brought to the planning table, and how those values influenced planning decisions. By undertaking this study, it was hoped that valuable insight would be gained into understanding the role that moral and ethical values play in planning an adult education program.

Methodological Approach

This research project employed a qualitative methodology involving open-ended interview questions asked individually to each of the research participants. Adopting such a methodology allowed for the development of interview questions that were designed to achieve an in-depth understanding of the basis for the actions of the participants. Qualitative research methods allow for an inductive exploratory process such that questions can be asked that delve into details of the planner's motivations and experiences. Merriam (1998) notes that the key philosophical assumption upon which all types of qualitative research are based is "the view that reality is constructed by individuals interacting with their social worlds" (p. 6). How people interpret and respond to their experience is in large part determined by their individual values, and this underlies each person's motivations. This study attempted to understand how moral/ethical values are understood by each instructor and interpreted in the context of program planning.

Since the interview technique allows the researcher to interact directly with the respondent, clarity of responses can be achieved by allowing the respondent to explain their thoughts, which decreases the amount of speculation required by the researcher (Palys, 1997). Questions can be asked related to the participant's experiences in planning programs, and how those experiences were shaped by their own values and interests. Further exploration was directed toward how each planner understood and translated their own values into their program plans, and how those processes ultimately affected learning outcomes. An open ended model allows for rich data to emerge and for the flexibility to probe more deeply into areas that are discovered during the process, as well as allowing the interviewer the opportunity to clarify questions and respond to any ambiguities. Merriam (1998) states that, "qualitative research can reveal how all the parts work together to form a whole" (p. 6), and it is in this sense that this study has attempted to understand what role moral and ethical values play in the planning process.

One of the drawbacks to using an interview technique is that the data collected can become cumbersome since it is often not received uniformly due to the inherent diversity in each individual's own responses. This issue becomes particularly problematic as the number of people interviewed increases. These issues did not significantly affect this study since the sample size was relatively modest and comprised five individuals in total. In addition, all of the individuals interviewed are experts in their respective fields and are likely not unfamiliar with describing their beliefs and actions in an in-depth and detailed way.

The interview questions were initially developed to move from broad descriptions and understanding of individual values, to how those values translated into the planning process, and then to what influence value considerations have on planning practice in general. The ultimate goal was to tie each interview question back to an aspect of one of the research questions (Palys, 1997).

To address the research questions, two primary areas of inquiry were explored. The first was the extent to which the planner understood moral and ethical values and their role in program planning. The second area was to determine how these understandings were reflected in their planning practice. To explore these areas questions were asked that sought to determine the different perspectives or approaches the planners had to program planning, and to understand how their own values fed into the process. How aware were the planners of their own values, and did they actively attempt to translate them into practice? Other questions were asked to determine what alternate views planners had that superseded or replaced moral/ethical values, and what other experiences they had that guided them in their role as planners.

It is important to note that, even when planners' actions are reflective of moral/ethical values, they do not necessarily need to be aware of this fact. More likely, they may categorize similar motivations differently, and would describe their behaviour with terminology that was consistent with the planning model chosen initially or with their own personal planning philosophies. This issue was addressed in the study by developing interview questions that asked specifically about the instructor's knowledge of formal planning models and about their understanding of planning principles (if any) that supported their own approach to planning.

Once the level of understanding and adoption of moral/ethical values was established for the planning process, observations were made regarding how these understandings related to the program activities and to learner outcomes. These observations were then assembled into planning considerations, or themes, which provided a basis for increasing our understanding of the role moral/ethical values play in planning practice. Questions that probed the role of moral and ethical values were related to the nature of program activities, the effectiveness of program outcomes and the relatedness and relevance of the outcomes to the learners. How did the learners describe their experiences in the program and in what terms would they describe success or failure of the program? Other questions were asked that addressed issues such as the basis for the evaluation of the program, who had input into the evaluation criteria, and did the program outcomes match the real and expressed needs of the learners? A detailed list of interview questions is included in Appendix A.

Once the interview questions had been established two pilot interviews were conducted with colleagues who were familiar with adult education and with the field of program planning. In both instances feedback was provided that assisted with restructuring the interview questions to ensure they related directly to the research questions and to ensure that the questions flowed in a logical sequence.

The interviews were conducted individually and lasted approximately one hour. In each case an initial interview was conducted at a place mutually agreed upon. Agreement was sought with each participant such that clarification or follow up questions could be asked via email or telephone, should they arise. The participants were provided with an overview of the research process, the purpose of the study, some likely outcomes, and with definitions of the research question terminology. The interviews were tape recorded and then transcribed.

Once the transcription was completed, the analysis began and the data was sorted by interview question so that comparisons could be made between study participants, by question. Early in the data analysis process the nature of the research became more clearly focussed. The research became less focussed on what implications this study might have on future planning actions, and more focussed on creating a better understanding of the role that moral and ethical values have in practice, and on how considerations that are reflective of those values, might be illustrated in an adult education context. The primary reason for this change was that since values are dependent upon each individual, and each planning situation is unique and includes a variety of individuals, determining what implications moral and ethical values might have in a planning context is necessarily complex, and well beyond the scope of this study. As a result, the research questions were modified to reflect this shift.

Sorting the data by interview question, facilitated the analysis of the data and allowed similarities between interview data to emerge. After the initial data analysis was complete, the similarities between interview data were sorted into themes that reflected the similarities. The themes were constructed such that they each related back to one of the research questions. At this stage, approximately twenty themes emerged from the data. There was some initial overlap between these themes, so they were further developed into the fourteen themes that are presented in Chapter 5.

One of the challenges encountered in analysing the themes was that, although they each had unique qualities, and they all had some connection to moral/ethical values, the degree to which they reflected these values varied considerably. Initial attempts to place the themes into discrete categories proved difficult as their interrelatedness seemed to require that they either be placed into a single category, reflecting their connection to moral/ethical values, or each into its own category reflecting each theme's unique characteristics. To overcome this difficulty, each consideration was placed on a Values Continuum that illustrated the extent to which each consideration reflected moral/ethical values or pragmatic/instrumental values.

Selection of Setting

The MLC program was chosen for a variety of reasons related to the nature of the program, to the individual's who were involved in its creation, and to my own beliefs regarding how programs of this kind ought to be planned. In addition, during my of Master of Arts (M.A.) degree I had written a paper on the MLC program and Peter Frost had provided me with a rich and detailed account of the program, its participants, and of the multidimensional dynamics inherent in the program instruction. These elements of the MLC program led to a fascinating experience for me and to a successful course paper. Largely as a result of this experience I began to consider the MLC program as the basis for my thesis.

Other primary considerations in the selection of the MLC program was that it takes a learner centred approach and places the values and beliefs of the participants at the forefront. This approach provided the opportunity to observe how a planner's consideration of participant's needs, interests, and values influenced the planning process. In addition, the MLC program benefited from a great variety of instructional and design expertise as the majority of those involved in the program are senior members of industry or academia and bring with them rich and varied life experiences all of which feed into the MLC program.

Study Assumptions

It is important to establish some context for the planning environment and for the planning activities that framed this study. The initial planning process that created the MLC program had been completed approximately six years ago, and included many of the higher level administrative planning issues relevant to most newly planned programs. Most of these administrative issues have already been thoroughly considered by those involved in the process and are not directly part of this study. Since the MLC program was established six years ago it has already been approved by the relevant stakeholder groups and has already been located within a delivery and administrative structure necessary for the program's success. The program had well defined educational goals, established design and feedback mechanisms, and many of the planning decisions that support these activities had already been made. Other administrative issues related to planning new programs such as establishing target markets, advertising and marketing, pricing and the selection of the instructional staff, had also been addressed. These issues are also not formally part of this research project, although they did influence the data that was gathered during the study. As a result, for this study, an assumption was made that many of the typical administrative planning considerations that face new programs had already been addressed. In addition, because most of the instructors had also been with the program since its inception, they have had considerable opportunity to bring their own values into the program, and have directly influenced the shape of the current program.

However, the fact that some of the higher level planning decisions had already been made did not diminish the relevance of this study as it relates to moral/ethical values in a planning context. In many respects, it was necessary to observe the ongoing planning that exists in a mature program so that the moral/ethical values being studied, were not obscured by the frequently awkward missteps that exist in most newly created programs. The regular planning and revision process that was part of the MLC program provided the opportunity to discuss with participants how decisions regarding certain program features were made, and what influenced those decisions.

In this study, the position taken was that many of the important planning considerations that affect programs are of a dynamic and ongoing nature. These considerations relate to the individual views of the instructors and how they change based on their experiences in the program. They also relate to how individual instructional activities are carried out, and how these activities are integrated to achieve particular learning outcomes. Further considerations relate to the nature of the program being intensely responsive to the needs of the participants, and since these needs change continually both between and within classes, this study was able to observe the planning process from an acutely dynamic perspective.

In developing a relationship between moral/ethical values and pragmatic/instrumental values it is important to make clear what specific meaning of values is being adopted. In this context, intrinsic moral/ethical values are viewed somewhat narrowly and are assumed to be morally good. That is, when a planner undertakes an activity that is reflective of one of their own values it is assumed that these values represent something that has a good or positive influence on the program experience.

It is possible to make the assumption that some instructors in the MLC program or some program participants are motivated by underlying values that are negative or that will in some way cause harm to themselves or to others. While these values may indeed be present, they are not the focus of this study. This study adopts the perspective that the values reflected in the planning considerations are morally good, and are related to positive behaviours, experiences and learning outcomes as reported by the program participants and reflected by the instructors during the interviews. In addition, this study does not examine values in a broader context which may include diverse understandings of values such as aesthetic values or religious values. This study attempted to observe and understand how values are evidenced in the MLC program, and to better understand how these values affect program activities and outcomes.

An important assumption made in this study is that all of the research participants are acting in the capacity as program planner. The study participants generally considered their primary role in the MLC program to be that of instructor, since they were actively in charge of the classroom activities. However, they were also intensely involved in the ongoing planning activities that supported and shaped this program. Without the instructors taking on a planning role, none of the planning activities that were instrumental in this program would have taken place. There were no formal program planners assigned to the MLC program, and the only other source of planning input came from the lead instructor, Peter Frost. As a result, it is reasonable to apply the role of planner to the MLC instructors, and in the study, the terms instructor and planner are used interchangeably.

A further assumption made in this study relates to the success of the MLC program. This program is assumed to be successful, and this is evidenced by reports from the instructors, and by the fact that the program sells out nearly every offering. According to the instructors, the program participants frequently made statements about the high quality of the learning outcomes and about how these outcomes were often deeply personal. These experiences not only allowed the participants to become better leaders in their careers, but also allowed them to become aware of the multitude of issues that support leadership, particularly those that that are related to individual values. It is important to note that while the goal of creating a successful program may in itself be reflective of moral/ethical values, this study does not specifically address this connection. Rather, this study focuses on the ongoing planning processes that sustain the MLC program and provide the framework for the program's learning experiences.

Project Selection

The MLC program's lead designer, Peter Frost, was initially approached in December 2003 with a suggestion that the MLC program become the subject for a research project in program planning. I explained to Frost that my interest in studying the MLC program was because I believed it exemplified a program that was planned in a learner centred way and respected the values, diversity, and interests of the participants, and that I wanted to understand what the basis of this approach was. This suggestion was followed up by a meeting where I presented my views on the nature of moral and ethical planning practice and on how I believed that the MLC program exhibited these characteristics. I further explained that, by looking more deeply into the individual planning philosophies that formed the learning activities in the program, it may be possible to shed some light on how moral/ethical values influence planning decisions and this could help other planners with their own practice. In addition, I indicated that participation in this project would be interesting and informative for the planners, and could ultimately lead to improvements in the program and these improvements could ultimately benefit program participants.

Frost was initially enthusiastic about this endeavour and asked that I prepare a one page description of the project and its potential benefits that could be sent to all the program's planners. Although Frost was interested in this project and indicated that it would be "fun" he was clear that he would not bind the other planners to participating, but that if a one page proposal was sent to the other planners (with Frost's endorsement) that the other planners would likely be receptive to the idea. This document was prepared and distributed by Frost to all of the instructors in January 2004, and is included in Appendix B. In addition to a brief description of the project, the document contained an invitation from Frost for me to meet in person with all of the program's staff during a "debriefing" event that was to follow the next offering of the MLC program.

A subsequent debriefing meeting was held several weeks later and I was afforded the opportunity to present my research ideas and my view of planning to the entire MLC group which included all of the instructors, organizers, and support staff. The entire group was immediately supportive of the research idea, but they did ask a number of very direct and specific questions related to the research. Some of these questions were practical in nature such as whether I wanted to attend the MLC program as a participant or as an observer, and what would the time commitment be for the instructors who were willing to participate in the study. Other questions were more conceptual and related to my own understanding of moral and ethical values and how my beliefs related to the MLC program. Additional questions took a more scientific approach and sought to explore what the research questions might be and how the research itself would be structured. I was able to successfully address all of the questions posed, and Frost suggested that they would discuss the idea of participating in the study as a group and would inform me later of their decision. The following day I received unanimous support from the group to proceed with the project.

Once support from Frost and his group had been secured an application was made to the University of British Columbia's Behavioural Ethics Research Board to conduct this study, and approval was granted in August 2004.

Participant Selection

The process of arranging the interviews and collecting data for this study was time consuming and required emotional sensitivity. The majority of the instructors involved in planning the MLC program are all senior academics or professionals whose schedules are already overloaded with the demands of their work and personal lives, and thus it was difficult to schedule the appropriate amount of time for interviews. Far more significant, however, was that the data gathering for this project proceeded during a time when Frost, the lead instructor and creator of the MLC program, was diagnosed with a terminal illness. As a result, the interviews were conducted during an emotionally sensitive time when all of the instructors were acutely aware that they were quickly losing someone whose ingenuity and creativity had developed the MLC program, but also someone who the instructors viewed as a colleague, mentor, teacher, and friend.

The emotional connection of Frost's illness to this project should be given some consideration in the data gathering stage since it may well have had numerous effects, although most would be difficult to quantify. It is difficult to know what these effects might have been or how they may have manifested themselves in the responses provided by the research participants. Given the emotional intensity of the MLC program, the nature of the instructors' values and beliefs about the importance of emotion in learning, and their personal connection to Frost, I expect they were considerable.

The effects that Frost's illness had on the interview process raises a number of questions regarding both the willingness of the interview participants to become involved in this project and also of the nature of their responses to the study questions. Did Frost's illness cause the instructors to reflect more deeply on the purposes, meanings, and goals of the MLC program, and did these reflections affect their responses to the interview questions? Was the resolve and commitment of the instructors to become involved in this study heightened by his illness, and did the study provide a useful opportunity for expressing those thoughts? Did the cancellation of the current offering of the MLC program due to Frost's illness also provide cause for more thought and consideration about the program? While it is difficult to answer these questions or even to assess whether they are the right questions to ask, anecdotal evidence from the interview participants does support a connection between the emotionally sensitive climate that Frost's illness caused and the interview responses. While this situation and these questions are clearly not part of the intended purpose of this research project, they do provide some meaningful context.

When the initial support for the project had been given there were ten instructors (including Frost) who were invited to participate in the interviews. Once the interview process was underway, Frost was not available due to his illness, so no attempts were made to contact him for this purpose. I did continue one-way email contact with Frost and kept him up to date as the research progressed, which continued for several weeks until he passed away.

For a variety of personal and professional reasons some of the instructors who had initially expressed a willingness to become involved in the study were subsequently not available. In one instance an instructor was removed from the participant pool when they indicated that they were uncertain as to whether their involvement in the project was appropriate. This instructor indicated that they were not involved to any significant extent in the planning of the MLC program, and this coupled with the difficulty in scheduling an interview resulted in this instructor not being included in the study. Three other instructors did not respond to a series of contact attempts so they were also not included in the project. It is difficult to know whether this lack of response was in someway connected to Frost's illness and the sensitive environment it created or if it was simply due to administrative issues related to contacting busy professionals for such a purpose.

The interviews took place in September and October 2004, and included five interview participants, the majority of whom had many years of involvement in the MLC program, and also in a similar program that preceded it. As a result of the many years of involvement in planning this program and the senior and expert nature of the participants, the data that emerged from the interviews was very broad and very rich, and gave ample basis for the research findings, which were presented in their final form in July 2005.

Additional supporting data related to the Meeting the Leadership Challenge (MLC) program came from promotional materials, from magazine articles on the MLC program, and from various planning and evaluation documents. Additional insight into the nature of the program and its origins came from the paper I had written on the MLC program as part of course requirements for my Masters of Arts (M.A.) degree. The data for this paper came from some of the same sources as listed above, but primarily from an hour long interview with the program's lead instructor, Peter Frost. I had known Frost for a number of years both as a student and a colleague, and during this time I became familiar with his work and with the MLC program. As a result of all of these sources of information, this study provides an opportunity for a comprehensive perspective of the MLC program to be developed.

Summary

The methodology employed in this study was designed to provide a basis for understanding what role moral/ethical values play in planning an adult education program, and how these values are illustrated in program activities and outcomes. The interview questions were designed to address both the role of moral/ethical values, and how these values were illustrated in practice. This was accomplished by selecting questions that addressed both the awareness and understanding that instructors had of the importance of individual values in the planning process, and to what extent the instructors respected and acted upon these understandings. The interview questions also addressed how a better understanding of these values might affect learner experiences and learning outcomes. The findings that resulted from the interview process provide a variety of interesting and diverse understandings about the role that values play in planning an adult education program.

CHAPTER 4

BACKGROUND OF THE MLC PROGRAM

Meeting the Leadership Challenge (MLC) is an Executive Education program offering that resides within the Sauder School of Business (formerly the Faculty of Commerce and Business Administration) at the University of British Columbia. The MLC program was created in 1999 and has been offered on a biannual basis since its inception. The program is designed for middle to upper level managers from a variety of organizational settings, and is structured into a six day, residential program held at the UBC's Point Grey campus. In most instances employers pay the $5,900 tuition, which includes meals, accommodation, activities and the program of instruction. The program was created to fill a well-recognized need for leadership education, and its length was selected to fill a void between Executive Education's shorter two to three day offerings and their longer three week offerings, which were not drawing sufficient participation. MLC took one year to develop and required the usual procedures of program approval including building coalitions within the various stakeholder groups, such as the Executive Education group, the Dean's Office and the program instructors.

MLC is an intensive program that is designed to teach people how to lead others, as well as how to lead themselves in ways that are both healthy and productive. The MLC program serves a variety of purposes, but its stated mandate is to broaden the participants' understanding of what it takes to be an effective leader. The program's approach is to explore participant's leadership challenges on many different levels, and this process is facilitated by a variety of individual and group exercises including case studies, small group projects, experiential activities and lectures. The MLC program is grounded on two distinct assumptions. The first assumption is that leadership can indeed be taught, and it is not strictly an esoteric quality possessed by a select few. The second assumption is that effective leaders require a balance between practical leadership skills and an understanding of who they are as a leader (MLC, 2005).

The MLC program was designed and is taught by a number of key instructors and designers all of whom were guided by lead designer, Peter Frost. Frost has an impressive résumé of research on a variety of leadership topics, and is widely recognized for his innovative approaches to teaching. As a result, Frost's insights into teaching leadership were well-grounded in research, but were also balanced by interesting and diverse holistic, inspirational and theatrical constructs, that allow for a more unique learning experience.

While Frost guided the planning process he benefited from the contributions of his instructional team who have actively been involved in planning the program since its inception. The team embraces a balanced, "whole person" approach to education, and although the program is designed to teach leadership skills, it does not take a simple one dimensional approach to leadership instruction. Instead, the programmers designed a workbook of articles and practices for participants to work through which require considerable self-reflection. The programmers also took a holistic approach to learning by incorporating activities such as yoga, physical conditioning, and diet and nutrition into the curriculum. These activities, coupled with a good variety of instructors, enable participants to receive a very balanced experience. One program goal is to have the whole person exposed, so that a deeper personal understanding of what leadership means could be achieved. This approach is consistent with a liberal conception of adult education in that, "it is the individual who is at the centre of this philosophy, and personal development is the primary goal" (Lawson, 1997, p. 294).

The MLC program requires an exploration into one's individual psyche to draw out those qualities that form the basis for one's beliefs. This process of critical reflection inherent in MLC is significant since "Critical reflection leads us to change our assumptions and perhaps transform our perspectives" (Cranton, 1998, p. 188), and it is this notion of transformative learning that underlies many of MLC's activities.

Learner's Needs

One of the ways in which the MLC program addresses the learner's needs is by recognizing that MLC is an energy intensive program, and that participants' energy levels will fluctuate over the course of the week. The beginning of the program is front loaded with content and with activities that are designed to open participants up and get them thinking about leadership perspectives. Later in the program when energy levels might begin to wane, more interpersonal as well as team activities are introduced. One particularly interesting example of addressing the energy fluctuations within the participants is the rhythmic drumming session introduced by a master drummer midway through the program. According to Frost, this type of drumming has emotional and physical cleansing qualities, and acts to calm and relax the participants so that they are not only able to gain insight into their own leadership issues, but also to prepare them emotionally for the remainder of the program. This view of using drums to achieve such ends is shared by other program designers. "Drums are energy,... ...they are needed to express our energy and engage our beliefs" (Counting Our Victories, 1996).

The program concludes on an energetic note with the presentation of each participant's individual statement about leadership, and with the presentation of each group's performances depicting their creative solutions to leadership challenges brought to the program.

Feedback is critical to a learner centred approach to program planning and in the MLC program close attention is paid to the details received from program evaluations, and to each of the instructor's performances. When each program offering is completed an intensive debriefing is conducted which begins with a detailed evaluation that is completed by the participants and is circulated to the instructors. Subsequent to this, two distinct sets of debriefing meetings are held.

The first meeting occurs directly after each course so that feedback can be reviewed while the issues are still fresh in the minds of the instructors. The second meeting occurs in the week prior to the following session to ensure that the instructors have actually addressed all the issues uncovered in the previous course, before the next course starts.

From the evaluation process the instructional team learns where they need to improve, and where they do not need to improve. As a result, every program has new components, revised sequencing, and a variety of other changes designed to be responsive to the participants needs. The continuous and interactive nature of the evaluation process is an important part of addressing learner's needs and is supported by program planning literature on conducting effective programs (Caffarella, 2002; Nadler, 1982; Boone, 1985).

Planning the MLC Program

The essence of the MLC program, according to Frost, is to establish an environment that has an intensive, immersive, hands-on, hands-in, hands-around structure. The intent of the program is not simply to teach leadership, but to fully immerse the participants in a series of informative and reflective moments so that they can discover more fully what kind of leader they are, and to begin to understand the diverse contexts within which they and the other participants operate.

One of the main program goals is for participants to experience leadership in two broad themes: how to lead others, and how to lead themselves. Half of the course is about leadership ideas, models, and practices found in most organizations, and half is about who the participants are and what values they possess. MLC focuses on both the content of leadership instruction, and on personal growth by developing an awareness of the participant's own values and the values possessed by others.

While the program is largely based on Frost's ideas, it is successful because others involved in the planning process have embraced his approach. A fundamental component of this approach was the agreement on the overriding mechanism to understand and facilitate the instructional process. This was accomplished by the inclusion of a framework to guide how leadership could be taught. In this integrative approach, four frames of leadership are considered, (i.e., structural, human resource, political, and symbolic). This approach was adopted from the Four-Frame model developed by Bolman and Deal (1997), in which each frame represents its own image of reality. The benefit of using the four frame model is that, as each frame is realized, it provides a greater appreciation and understanding of how different perspectives contribute to our understanding of how organizations operate. Bolman and Deal (1997) relate this approach to the astronomer Galileo's discovery of the telescope, in which, "...each lens that he added contributed to a more accurate image of the heavens" (p. 15).

The belief behind using these frames is that effective leaders must learn to operate within multiple frames and resist the temptation to revert to the frame within which they are most comfortable. To use these frames effectively, Frost chose instructors based on their expertise and understanding of each particular frame. Through planning discussions, the instructor that possessed the best skills in a particular area emerged, and activities were then developed that explored that particular frame.

The diversity inherent within the four frames structure allows for a very balanced approach to understanding leadership. Each of the four frames allows sufficient flexibility in ways of approaching leadership that it is possible to organize whole days of activities within each of the frames that relate to one another. The goal is that, by the end of the course, participants can see that leadership is about, not only understanding the program content, but also about working through and with people to understand different perspectives. Further, it is about understanding the politics of organizations, about organizational culture, and about the "theatre of the performance" (i.e., the context) within which the issues are played out. As a result, participants are not only exposed to a variety of leadership perspectives, but they are also able to uncover their own beliefs and understanding of leadership.

The MLC program contains a very strong component of theatre, performance and presentation. According to Frost, the four frames provide a basis for understanding the complexities of leadership, and much of the learning within the frames takes place by using a variety of group activities. These activities range from simple problem solving activities, to a final theatrical presentation depicting challenges and solutions to real world leadership problems. The purpose of these theatrical components is to allow many different ways in which participants can reveal themselves and gain personal understanding of leadership issues.

To build a program that focussed intensively on the complex interrelationships between personal values and organizational responsibilities, the selection of the instructors was critical. According to Frost, part of this selection criteria included not wanting the program to be taught exclusively by faculty members. This was not because faculty members were not good teachers with highly relevant expertise, but because some of the leadership issues resided in people who were consultants, practitioners or those involved with leadership from a variety of different perspectives. It was as important to build the team of instructors as it was to build the program for the participants.

Three of the instructors have been closely involved in the development of the program from the beginning, and two others, who are new additions to the team, work within the existing structure. New instructors bring with them their own ideas, and these ideas are carefully woven into the curriculum so the program evolves organically. The instructors are hand picked to ensure that, not only are their areas of expertise appropriate, but also their mix of skills, which is equally critical. Frost stated that, "It is important to have the right mix of people since they are teaching participants to think, as well as to know what to do." This requires a mix of instructors who are knowledgeable about the subject of leadership, have experience applying leadership skills in a practical setting, and can challenge and provoke participants to gain insights into their own leadership issues. There is also a mix of genders recognizing that it is important to send a signal that leadership is not just a male domain. The program is engaging for the instructors as evidenced by their willingness to continue their involvement in the program. Instructor turnover has been minimal amounting to just two individuals leaving since the program's inception. The turnover that has occurred has been based on interest, individual circumstance, and need, as opposed to dissatisfaction.

An important component of the MLC program is to encourage open discovery, and this is accomplished through a great variety of activities, exercises, content and instruction. In this approach, it is not always possible to predict or foresee when individuals will have particular breakthroughs or when answers to tough questions will be sought. To address this, the program is designed to give participants ready access to all of the course instructors at any time. Instructors are available even if they are not the primary presenter that day. By having ready access to the experts, participants can act immediately on their discoveries or deal with particular problems or questions directly. By encouraging and facilitating these discoveries and resolving problems quickly, the needs of the learners' are supported and the learning process enhanced.

MLC requires participants to be in residence, so they can be immersed in program activities. One of the advantages of this structure is the ability to assign evening readings and personal reflection activities without outside distractions. This requirement also facilitates informal gathering of participants, which leads to the development of closer relationships between the participants, and this contributes to the program's goal of understanding the values and perspectives held by others. The MLC program encourages bonding and personal disclosure and this helps build an environment where participants feel safe and can share their fears and revelations. As one program participant stated, "the informal gatherings allowed us to fully indulge in the comfort of peer mentorship" (Withers, 2000).

One perspective of adult education that is clearly evident in the MLC program is related to how adults learn. According to Frost, adults learn differently from young undergraduate students in university and college programs. For adults, the process is about self-inquiry, about interaction, about practice, it's about the experiential, it's about the opportunities to reflect and integrate, and it is much more of a collaboration between the instructor and the learner. It is much more of a joint venture than strictly a teacher centred approach. The approach in MLC is that the combined experience makes for the learning, not just the instructor. In fact, in MLC the participants may know more about leadership than the instructors, they may just not yet know how to speak about it. As a result, the strength of the collective experience facilitates the learning process. This view is well supported in the literature on adult education. Lindeman (1926), Knowles (1998), Cervero and Wilson (1994) and others agree that adults are motivated to learn by examining life situations and that the focus should be on the lived experience and not on rigid pedagogical formulae. Instructors are to engage in a process of mutual inquiry rather than just transmitting their knowledge to the students.

Effective program planning models typically address needs assessment by including detailed discussion with stakeholders and potential participants (Caffarella, 2002; Houle, 1996; Sork, 2001). However, despite MLC's apparent success, there was no formal inclusion of this planning step. According to Frost, the participants needs were determined from the great breadth of experience that Frost and his instructors had gained by studying, engaging in, and teaching leadership in both individual and organizational contexts. In addition, it was the facilitation of the program's self-discovery process that contributed the most to program modifications focused on addressing learner needs.

To a certain extent employers needs were also addressed despite the lack of any direct consultation. According to Frost, the general view in the MLC program is that, if you have leadership issues, bring them to the program where they can be dealt with in a supportive and constructive environment. In this way, issues from the workplace that are troubling or challenging can be discussed and dealt with, and then an action plan can be developed so the participants are equipped to deal with the issue back in the workplace. However, since the program is also about the exploration of the underlying issues that affect leadership, many of these issues do not emerge until the end of the program. As a result, initial consultation with the employer would likely have little effect in drawing out these types of issues.

A general principle in MLC is that the instructors try to address the participant's issues from a variety of different perspectives, and this includes the organizational context. The instructors facilitate the process within teams and within their project work to allow participants to pull in their own workplace issues. So, in this sense, workplace issues (the majority of which are directly relevant to the employer) are addressed. However, Frost did concede that, "we don't do much follow up with employers, we probably should, but everybody is too damn busy, but it would be the right thing to do."

The MLC program is carefully crafted to be both enlightening and invigorating, but it is the program's outcomes that are most relevant. Achieving a breakthrough, gaining a sense of renewal, or becoming revitalized and discovering new ideas, are what participants remember most. It is also a source of great pride for the instructional team.

The instructors witness these discoveries first hand during the program, but also in communications with the participants after the program ends. Most of the instructors also indicated that they had been contacted subsequent to the program, sometimes after many months, and former participants would relate stories of how their program experiences were still leading to discoveries in the workplace and in their personal life.

As a result of learner-focused, values-intensive approach that underlies the MLC program, there exists an opportunity to explore how moral/ethical values function in this particular environment, and how values interact to inform planning practice. By understanding more about the role that moral/ethical values play in planning practice, we may be able to better understand the influence values have on learning activities and outcomes, and on the experiences of the learners'.

CHAPTER 5
RESEARCH FINDINGS

The findings in this study cover a broad spectrum of beliefs and understandings about how planning ought to proceed and about how a program designed to teach leadership from within should be constructed. These results specifically address the research questions and illustrate the numerous ways in which values are reflected in planning decisions and actions. The results also detail how participant experiences and learning outcomes are affected by values, and this adds to our understanding of how values can influence program planning in an adult education context.

The findings detail the planning considerations that are evident in the MLC program and are reflective of what the program instructors felt were the critical elements in the planning process. The findings in this chapter have been organized into themes or planning considerations that illustrate the values that guide the ongoing development of the MLC program.

The development of themes is a useful way of increasing our understanding of the role values play in planning an adult education program, because they indicate specific ways in which the instructors translate their values into practice. Since a primary goal of this research is to better understand the relationship between values and planning practice, developing themes that are reflective of values in practice, is critical. In addition, themes can be broadly interpreted by planners, which may allow for their application in a variety of planning contexts. The Values Continuum presented in Chapter 6 was developed to illustrate the degree to which each planning consideration is reflective of moral/ethical values or pragmatic/instrumental values.

The themes developed in this study represent how a variety of planning decisions can influence a wide variety of instructional activities. The planning considerations described in this chapter are not presented in any particular order, and this lack of any prescribed order is consistent with how they were described by the interview participants.

Location

The location chosen for the MLC program facilitated two of the central features that contributed to its success, immersion and isolation. MLC participants are required to attend daytime and evening sessions at the UBC Point Grey campus and stay in on-campus accommodations. Geographically isolating the participants physically removes them from the outside distractions of their personal and professional lives. Equally important, however, is that the participants are also isolated mentally. The program schedule places overwhelming demands on the participants and leaves little time to spend focussing on anything but the program content. As a result, isolation is one of the enabling factors that allows participants to become immersed in the program material.

Another benefit of being isolated from outside distractions is that it increases a participant's access to program instructors and to the other program participants. This increased access allows program participants to become further immersed in the program experience. Immersion and isolation are seen to be important because they free the participants from outside distractions and allow for greater involvement in program content. *"...programs that make a difference aren't just kind of one hour a day, you know you've got to be immersed in them, you've got to be engaged" (R3, p.1).*

Practical Perspective

A major component of the MLC program is its focus on using practical examples from the workplace to address a variety of leadership issues. The ultimate goal in this approach was to provide participants with practical skills to take away with them and apply on the job. *"They want practical things they can walk out the door with"* (R2, p. 17).

Each participant brings to the program a problem from their own work life where they have the opportunity to address real-life problems using a team approach. The benefit of using a team approach is that the diversity of opinions stemming from the team allow for exploration of many approaches to problem solving, and this coupled with the instructor's integrated approach to teaching allow for interesting solutions to be developed. *"We looked at a way to integrate, and the way to then give people practice, non-intellectually based practice" (R4, p. 2).* The belief in taking practical examples from the workplace, addressing them in an integrated way, and then using the results to build tools to solve other workplace problems, was consistently referred to by the instructors as one of the most useful and meaningful phenomena that program participants took away from the program. *"I'm bringing practical skills in... ... in an interesting passionate kind of way" (R2, p.18)*

Another factor that guides some of the planning activities was a focus on learning outcomes. *"I think if I had to characterize the way I plan out any course, it is planning by outcome" (R2, p. 20).* The interview data suggested that the core motivation behind this belief was the desire to equip participants with the right skills so that they would be comfortable and confident to take what they had learned and apply it in their lives.

<u>Content Integration</u>

Integrating the wide variety of program content and learning activities was described as an important planning consideration in the MLC program. The goal of an integrated program is to design each diverse component so that each part both supports and interrelates to the others. It was also important that each component relate directly to the four frames of leadership that provided an overarching structure to the program. A contributing factor to the successful integration of the program components was the instructors' willingness to spend time observing each other's presentations.

> *...we all sat in on each other's presentations so we were essentially there pretty much full time, all the instructors in the whole thing, so we could see how it all integrated and flowed together... (R2, p.19).*

While all of the instructors recognized the importance of integrating the various program elements, one instructor went on to say that, because the program elements were so diverse and integration was so critical to the program, more time needed to be spent working towards this goal.

> *One of the things that I felt would have kept us more whole as program was to do more debriefing as a team, where we really did explore how the edges fit together and where what I was doing could be strengthened or had interplay with what they were doing. (R4, p.3)*

<u>Excitement</u>

One beneficial planning consideration that is often overlooked in formal planning models is the benefit derived from creating an exciting learning environment for both the program participants and the instructors. This type of environment was created in part by the dynamic qualities of the program content and by the nature of the successful high-level professionals the program attracted. However, the instructors described themselves as being the main source of excitement in the program, as it was important that they were excited to be involved in order for that excitement to spill over onto the participants.

A primary source of excitement for the instructors stemmed from being involved in a process that could bring about profound change.

> *I was just really excited about the program because I think it really made a difference and I could tell that ... ...for the participants to dedicate that amount of time and that amount of resources it really meant that it meant something for them, it made a difference. (R3, p. 1)*

Other instructors added that their excitement related to the environment that they would be working in, and focussed on the enjoyment of working with the other program instructors. *"... I'm excited about being able to work in that kind of an environment" (R3, p. 1). "I was just really, really excited to be part of the team" (R3, p. 1).*

While the instructors did work to ensure that the program was enjoyable for the participants, a significant part of their own motivation was that it was also equally enjoyable for themselves.

> *I really get that sense that it's as much [fun] for them as it is for the students and that the learning's happening all the time both ways and it's almost integral to the program in a way because you need that kind of excitement to keep things going....(R5, p. 17)*

The interview data also suggested that the excitement the instructors brought to the classroom was infectious.

> *I think the excitement that I see in the room when people are there... ...for sure there are people smiling and enjoying themselves (R5, p. 9). I think the instructors are learning and rowing and it's just you get kind of caught up in that whole that whole theme and that whole environment and energy of what's going on. (R5, p. 7)*

<u>*Self-awareness and Self-disclosure*</u>

The interview data suggested that the MLC instructors sought to create an environment where self-disclosure and self-awareness were recognized and supported so that a starting point could be established to understand the individual values that participants brought to the program. The instructor's responses consistently referred to the importance of creating self-awareness as an essential condition so that each participant could experience outcomes that were a clear reflection of what they represent in a leadership context. The MLC program contains a variety of exercises and experiences that foster self-awareness and effective self-disclosure. The desired program outcomes require effective self-disclosure so that the core of what each individual believes is exposed. It was important, *"...that a person has found an awareness of their choices and the courage to make choices in the direction of deeper integrity and more awareness of the impact they're creating..." (R4, p. 12).*

Creating an environment supportive of self-awareness and self-disclosure was challenging because many of the program participants were simply not accustomed to considering themselves in this way. *"They come unaware, unaware of the importance of the inner side of leadership" (R4, p. 8).*

One of the primary beliefs that ground the program is that, in order to lead others, you must first be able to lead yourself. To understand what this involves, the instructors must first create an awareness within each participant of what their own values are. Using values as a source for learning is a difficult process because many individuals are not even aware that they possess certain values that influence their behaviour. *"I think they come with values—I think they come unaware of their values" (R4, p. 17).* One of the ways in which individual participant values are exposed is through using stories. Using stories to build emotional connections that reflect individual values can be a powerful mechanism to achieve personal growth.

> *I start with those stories early on and the stories also have a lot to do with understanding values, your personal values, and so you're working with your presence—fierceness about who you are and recognizing that by playing out these values there is more impact. (R4, p. 7)*

Exposing the values of the participants requires more than simply relating stories to them about previous experiences. This process requires a fundamental understanding of who the participants are, what place they have in their careers and personal lives and what issues they bring with them.

> *I would think from a planning perspective—if you can't rely on that intuitive grasp of what needs to be done and how it fits together I think people that are creating adult learning environments need to spend a lot more time learning about the people that are coming into that course. (R2, p. 35)*

One of the ways in which self-awareness was gauged was through the theatrical performances that each participant was involved in.

The outcomes that I look at is over the space of the three different kind of performances that they do, to see how much of that self-disclosure, self-awareness they have allowed themselves to make... (R2, p. 23)

A program that focuses so intently on self-awareness and self-discovery carries with it considerable risk. Program participants are essentially strangers when they first arrive and making deeply personal disclosures is difficult for most people, particularly when they are in a new and often unfamiliar environment, so maintaining a supportive and safe environment was important.

...there's a huge responsibility I think in this program not to push people too far in that direction because it's a very intimate setting—it's very intense... ...they reveal a lot about themselves and that makes them all very vulnerable and I think it's really important that we always maintain the safety piece... (R2, p.23)

Dealing with risk and keeping the participants safe is an important part of the MLC program. The MLC program focuses on exposing individual participant issues and this often requires participants to move beyond their individual comfort level.

People... ...reveal a lot about themselves and that makes them all very vulnerable and I think it's really important that we always maintain the safety piece—because you don't want to tell people to make themselves vulnerable and then crap on them as a result, so that's a huge responsibility. (R2, p. 23)

Creating a safe learning environment and allowing for the development of self-awareness and self-disclosure allows the program to succeed in creating interesting and often unexpected learning outcomes. *"I needed to demonstrate that... making it safe, contributed to making it a fertile ground for people to learn something they didn't really expect to learn" (R4, p. 4).*

In some instances, creating a safe learning environment relates to the physical activities the program includes, and this is addressed by setting limits and designing certain modifications into the activities in order to maintain the safety of the participants. In other instances, safety refers to dealing with the mental challenges the program provides. In this sense, safety is ensured by encouraging the program participants to trust themselves, and not to be intimidated by the instructors or by other participants. In other instances, this was accomplished by focussing participant critique on the material itself (e.g., theatrical presentations) and not on participants personally. Still other occasions stressed the importance of caring for one another, and on building connections with other participants as a way to build trust and create a safe learning environment. As a result, safety is prevalent throughout the program and is maintained in ways designed to address each unique situation.

Ultimately the goal of self-awareness and self-disclosure supports the overall aim of the program and that is to create successful leaders. *"It's made them, I think, more caring or respectful leaders—aware of more issues and of more choices…" (R4, p. 17).*

The instructors indicated that in order to achieve high levels of self-awareness and uniquely individual outcomes it was important that a sense of community be created. These processes feed into each other as the more self-disclosure that emerges the more connections each participant is able to make with the others. This in turn creates an environment where individuals know more about each other and become more trusting and more willing to disclosure personal issues about themselves. Creating a supportive community environment helps facilitate the emergence of deeply personal issues that would simply not be made public in a typical classroom environment.

> *I think getting back to that community atmosphere where we're making people comfortable. If you're in a group with twenty people and you feel like you're doing it on your own, wow, it's not going to be nearly as much of an experience (R5, p. 15)*

<u>*Expectations*</u>

Understanding and managing the expectations of both the program participants and the instructors was reported in the interviews as being a critical consideration in planning the MLC program. The need to address expectations existed at both the program's outset and during the program's various instructional activities.

Since the program's location was a major university setting, one of the challenges faced by the instructors was dealing with the initial expectations of the participants. Many participants expected the MLC course to be just another "run of the mill" faculty taught leadership training program, and they were not expecting the holistic focus and deeply emotional perspective that embodied the program.

> *I think they come in expecting you know we're going to Sauder's School of Business and we'll be talking to professors—they're going to teach me stuff—there's going to be you know ABC questions and I'm going to get XYZ answers and it's going to be very you know more of an academic atmosphere and then when they get here, after a day their whole belief was like that was completely wrong (R5, p. 15).*

These initial expectations tended to be more superficial, however, and after being in the program for a few days the participants began to realize that they had to modify their own expectations in order to move through the program. *"They come with expectations that are much more on the surface—oh I'm already a very successful leader" (R4, p. 17).* These expectations are recognized and understood by the instructors and are managed through the program's various components so that the participants are able to make the types of discoveries about themselves that increase their ability to be successful leaders.

The majority of instructors supported the notion that imparting a sense of acceptance was important to help manage the participant's expectations. It was essential to recognize that where the participants were coming from, their experiences, their challenges, the obstacles they faced, and their own shortcomings were not only real, but shared by others and respected by the instructors. *"Another value I have is that exactly where you are is okay, and to be able to acknowledge that in different ways... ... without patronizing them" (R4, p. 5).* Part of embracing acceptance is to show that it is acceptable to display the frustration and stress associated with dealing with personal and professional issues. Dealing with these kinds of issues is part of a consistent approach in the MLC program where considerable effort is spent exposing the related emotions and then dealing with them in a supportive environment.

While the instructors managed the expectations of the program participants, they also reported that they felt strongly about what was expected of themselves. The expectations the instructors placed on themselves reflected the perspective of the lead instructor (Peter Frost), as well as their own expectations about their individual content knowledge and how their role fit into the overall program. These expectations were not just to come in and teach something they knew, but also to ensure that what they taught was integrated into the other sessions and into the four frames of leadership that guided the program. *"I think a really valuable planning process was to have us all sitting in on each other's courses and understand the context, and the fact that you are kind of going through this together" (R2, p. 19).* In this sense the four frames helped manage the instructor's expectations by providing a framework within which to operate.

Since the program's content is so diverse and to some extent unconventional (e.g., teaching yoga, nutrition, physical exercise, etc. in a leadership training program) the expectations of some of the instructors were simply that their contribution would be accepted, and that eventually the participants would understand how each diverse topic fed into understanding leadership. *"...so my expectations at first were just, hopefully, they'll be able to accept this and they'll come" (R1, p. 2).*

While there was an ever-present endorsement of all of the instructors from Frost, there was a subtle sense for each newcomer to seek approval as they introduced their program content to the group. *"Acceptance and an open willingness to try something that from a high intellect kind of group—doesn't make any sense, why are we doing this—what's this got to do with our workshop..." (R1, p. 2).* So while the instructors were focussed on managing the expectations of the participants, they were equally concerned with what was expected of them. As a result, expectations played a dynamic role in how the program was formed and how it evolved.

Priority Setting

Ensuring the success of the MLC program requires careful attention to establishing priorities. The MLC program requires considerable resources and the most referred to resource constraint was time. Time constraints are not unique to the MLC program and their relationship to moral and ethical values is not immediately evident. Their inclusion here is significant because of the importance the instructors placed on maximizing contact time with the program participants and because of some of the ways in which time constraints were dealt with. In addition, managing time constraints requires establishing priorities regarding what material is included in a session and what is left out, and this process says a lot about what the instructors believe and what they value.

All of the instructors expressed some level of frustration at there being insufficient time to cover their content, to work individually with the participants, and to work with each other on integrating their program components. With respect to the success of the program, *"Time was absolutely of the essence" (R3, p. 5).* Each element of the MLC program was designed to encourage personal discovery and disclosure. While there was some negotiation between instructors related to how much time each program element received, the overall sense from this group was that there was simply not enough time to address all of the individual issues that were constantly emerging.

One of the areas where time constraints were particularly evident was during the sessions that focused on the presentation side of leadership. Individually coaching each participant in not just what to say, but in actually how to present it, was so time intensive that often instructors were left just to focus on a few key areas of the presentation. *"I don't feel that there is enough* *time to really do justice to the whole performance area so I really just try to hit the high points" (R2, p. 25).*

While the time constraints evidenced in the presentations might have been an insurmountable obstacle in many programs, the data suggested that the participants in the MLC program typically had a high capacity to learn and to succeed, so as a result, the instructors typically threw more content at them than would be expected of a class from the general population. *"These are all pretty smart type A people, so they get it fairly quickly, you can throw it out there fairly quickly and they grasp it..." (R2, p. 25).*

The instructors were aware that sufficient time was needed to cover their material, but also that there needed to be time for the participants to react to what they've learned, and time for the instructors to deal with that reaction. Often, time was not available to deal with the emotional fires that flared up when certain emotions surfaced. *"Time's a big one in this program because they're getting so much in that week and there's a lot for them to deal with" (R5, p. 6).*

The program schedule does allow for some breaks during the day and in the evenings that are designed to allow participants the opportunity to reflect on what they have learned that day and also to work on exercises that build on what was learned, and to prepare them for what is yet to come.

> *We also try to give them lots of time to work on their own stuff, so when they come in we tell them—come with a real dilemma that you're struggling with, and so we give people some quiet time during the day to reflect on the learnings of the day and how they can apply that to their real life learning. (R3, p. 12)*

The instructors described how they placed a very high value on the exploration and discovery component of the program, and the amount of time these areas take to address can be both considerable and not easily predicted. Despite time being scheduled for reflection it was frequently seen as insufficient due to the varying amounts of time different people need to make personal and relevant discoveries. This led to additional frustration on the part of the instructors because, if the participants don't have time to read, reflect and make personal discoveries, they will not be able to fully embrace the fundamental notion that leadership from within requires a deep understanding of one's self. Even though the instructors designed the schedule to allow for breaks and reflection, it was often described as being insufficient given the nature of the topics the participants were dealing with.

> *They don't have time to read... ...they never had time to read it, they didn't have time to do the homework... ...we didn't give them space to be thoughtful, to be reflective. (R4, p. 8)*

Time constraints were a poignant resource consideration both for the program itself, and as it related to the lives of the program participants. A primary goal of the MLC program is to allow participants the time to reflect on things they would not otherwise have time to consider due to the overwhelming demands on their own time from their personal and professional commitments.

> *You're achieving several different tasks a day and you never really get any time to reflect on anything and you just kind of feel that you're on a wheel, and I think when you go through this week you're actually seeing yourself improve... ...you're definitely spending time thinking about your family, your colleagues... ...your personal situation in life and where you want to go and am I really getting what I want out of life. And I don't think many of these people get a chance to even think about that let alone work on it. (R5, p. 16)*

One of the more successful attempts described by the instructors to deal with the time constraints was for the instructors to spend more time with the program participants outside of the scheduled sessions and during the social events. These occasions allowed instructors to make connections with the participants that the tight classroom schedule simply did not permit.

> *Time is the biggest constraint. I always feel that we're going far too quickly, we're not spending nearly enough time with them, which is why I try to, and other instructors do as well, try and make themselves available in the down times—just to be hanging around if somebody wants to come and talk. (R2, p. 25)*

The importance placed on time in the MLC program is closely reflects the commitment the instructors showed towards the program goals, to the participants, and to each other. The feedback received from the instructors consistently referred to commitment as a key contributor to program success, and this was in part related to how much of their own time they were willing to spend during the program. Instructors were willing to make themselves available whenever possible, even outside of their scheduled presentation times.

> *I think pretty clear to a lot of the participants, we're not here for the paycheque, [we're] very committed, most of the instructors are there the majority of the day even though they've only have a half an hour or so to instruct, and I think the instructors are learning and growing and it's just you get kind of caught up in that whole that whole theme and that whole environment and energy of what's going on. (R5, p. 7)*

The amount of time the instructors had to spend with each participant was also clearly a function of class size. Most of the instructors commented on the need to keep class size small so that enough individual attention could be paid to each person, but also so that the class did not get so large that the participants would be too intimidated to share their personal stories and express their emotions.

Time constraints often led to a competition between various program goals, and this created some challenging obstacles in scheduling the program. In one instance, the time allotted to complete the program evaluation conflicted with a primary program goal of spending as much time in contact with the program participants as possible. Providing more time to complete the program evaluation would have provided greater opportunity for effective feedback and for improvements to be implemented in subsequent program offerings. However, this presented a conflict between the immediate goal of serving the needs of the current participants and the goal of constantly improving the program to provide a better program for future participants.

The instructor's comments often reflected a strong desire to spend more time in contact with the participants in pursuit of each person's personal learning outcomes, and this is indicative of the care and compassion the instructors showed toward the participants. *"I would love to spend more time with the participants in the room, even if I'm not in the front of the class, just to be with them" (R3, p. 5).* It is difficult to know whether or not this was always the motivation for all the instructors, and their motivation was not due to other reasons related to a sense of duty, obligation or peer pressure. However, the data that emerged consistently referred to the instructor's willingness to give of their own time to support the program's goals generally, and the participant's needs in particular.

<u>Energy</u>

The instructors described the MLC program as being energy intensive on a number of different levels, and achieving the program's goals requires a high level of energy both on the part of the instructors and on behalf of the participants. The wide variety of physical, mental and emotional activities pushes many participants to exhaustion, and the instructors carefully monitor energy level throughout the program. *"As I'm presenting I'm watching very attentively on everybody, you know eyes and gestures and energy levels" (R5, p. 5).*

Energy levels can relate to individual participants, but also to how energetically charged the classroom is. This collective element is difficult to quantify, but it was understood and interpreted by the instructors as a far more tangible and manageable element than it would otherwise seem. *"Not everybody understands... ...how energy in a classroom gets set or played with in different ways, I do that, I'm looking at that all the time" (R4, p. 11).*

The intensity of energy in the classroom was managed by recognizing that each program activity requires a different level of energy, both feeding the energy in the room and taking away from it. From this perspective it was critical to, *"Pay attention to them and to the interactions* *and the energy in the room" (R4, p. 5),* so that the experiences can be maximized and the participants safety can be maintained.

Energy levels were seen to be a key factor in the success of the individual program components, and without the appropriate level of energy in each component the program as a whole would not have been as effective. Keeping energy levels high allowed program participants to experience things they otherwise would have been unable to achieve.

> *The whole day they're just being fed with positive energy and it's pretty amazing some of the stuff that gets pulled off you know, I get, you know, overweight people in their fifties to stand on a ball and I can't get like a twenty-five year old snow boarder to do it... ...in the same amount of time, and it doesn't make any sense, so those are the things that really get me. (R5, p. 17)*

The instructors also indicated that it was not sufficient to just keep energy levels high, but to keep the levels appropriate for the activities being conducted. Sometimes it was important to bring down the energy levels to keep the class focussed on the goals or on the frames being explored, *"the participants almost go too far with it, you have to keep reeling them in... ...just bringing energy levels down and getting people to relax a bit..." (R5, p. 8).*

One of the ways in which energy levels were maintained throughout the day was by modifying the program schedule either by changing the time allotted to certain activities or by changing their location in the schedule.

> *It was an item we discussed in great detail after our debriefing last time—it was that we had messed up the schedule a bit and it had really interfered with some of their sessions and the way they were doing things and their energy levels. (R5, p. 14)*

<u>*Symbolism*</u>

Symbolism is one of the four frames of leadership upon which the MLC program is based, and its importance is clearly evident during the program. One of the ways in which symbolic leadership manifested itself was in the individual participant presentations, where the presenters are judged on not just what they are saying, but on what they are saying symbolizes. The symbolic frame of leadership is one of the most difficult for participants to relate to. *"This is a symbolic frame of leadership, the one that most people say that they're very uncomfortable with" (R2, p. 19).* The presentations are important here because they symbolize that, *"we're always on stage" (R3, p. 2)*, and as a result, leaders have to be ready to present their ideas and beliefs at any time and at any place.

Many of the activities in the MLC program such as yoga, working with balance balls, and drumming also show how symbolism is an important tool in understanding oneself and how each person relates to others. *"Everybody can participate and it demands team cooperation—it works beautifully—it's a great symbol and a great metaphor for what we're doing" (R4, p. 15).* Other forms of symbolism are less conceptual and are evidenced by activities like the formal celebration conducted at the end of the program.

> *At the end of the day we have this wonderful culmination... ...where we have a beautiful symbolic ceremonial celebration, which is very much Peter, as he understands the culture is you have to have a formal dinner... ...with white linen, and people really feel that they finished a very powerful program. (R3, p. 13)*

<u>Encouraging Feedback</u>

The MLC instructors described in detail how important the feedback they receive from the program participants is in order to ensure both the immediate and long-term success of the program. Feedback originates from a number of sources including classroom activities, social events and from a formal written evaluation. Immediate feedback received during the classroom sessions and during the informal social parts of the program are used to make immediate changes to program content so that particular issues can be addressed or so that new areas can be covered. The formal evaluation scheduled at the end of the program consists of a number of Likert type questions followed by a series of open-ended subjective questions and provides longer term feedback on a variety of administrative and program issues.

The instructors write their own evaluation questions and encourage everyone to fill out the evaluation paying particular attention to the subjective questions at the end. The formal evaluations were useful exercises for the participants to provide input into what they felt about each program component and about each instructor. During the classroom sessions a number of instructors encourage participants to take advantage of the formal evaluations because future program changes are based largely on the feedback that is provided.

> *...if there's something specific you liked here or something that didn't work for you, tell us, you're not helping us make the program better [if you don't], so I remind people of that in my class, and I'm sure everybody else does too. (R1, p. 11)*

The instructors reported that the easiest type of feedback to quantify, but often the most difficult to make use of, was the information provided by the objective evaluation questions. These questions covered typical planning topics such as program content, administration, instruction, learning outcomes, and so on, and program participants ranked how positively or negatively they found each of these program elements.

> *I basically take the evaluations that are administered by the university and they're done based on all kinds of different criteria... ...I look at that quite a bit to see how people found the whole thing flowing together and then I look at individual evaluations of how people have evaluated me... (R2, p. 28)*

The objective data, however, was sometimes difficult to make use of because it was often devoid of any emotional or contextual perspectives. For example, a participant may not have liked a particular instructor's teaching method as it may have challenged them to move beyond their comfort zone. In this instance, the instructor may have received a low ranking even if their method ultimately evoked a meaningful learning outcome in the participant. As a result of the potential for this to occur, most instructors placed far more emphasis on the written subjective responses to the evaluation questions.

The majority of the instructors indicated that both the formal evaluations and the informal feedback received during the program provided good sources of information upon which to make program changes. A number of the instructors pointed to the particular usefulness of the "stories," the written comments and anecdotes that program participants included at the end of the evaluations.

> *I find the anecdotal comments are much more useful—where they'll actually point something out and say you know this is what stuck with me, because as I say, if I'm looking at outcomes and those A-HA moments that's where I see them. I don't see them in the numbers because that doesn't tell me [if they are] happy, or satisfied with the experience. (R2, p. 28)*

Another difficulty in using the formal evaluation is that responses are not always consistent between program offerings despite program content and delivery remaining largely the same. This made it difficult to compare scores between program offerings to determine if any changes that were made were in fact successful. One possible explanation for this occurrence that was provided was that there can be considerable differences in program cohorts based on each group's comfort level with the program content.

> *We had one group that we all were like wow, what a group this is, they just were willing, they tried anything and everything and they went for it, so everybody's evaluation numbers were super hot. The next group was kind of closed, more conservative, everybody's numbers [dropped]. (R1, p. 9)*

Some instructors suggested that the variation in evaluation numbers was due to the participants just not being ready for the types of experiences the program presented. Since the evaluations are based on participant perceptions this can lead to a significant variation in evaluation scores. This situation also suggests one difficulty in using discrete evaluation scores versus the more immediate and context rich feedback received directly from the participants.

> *That's my experience of it, so you know the one that we all had the worst evaluation... ...I understood that that's their perception—their perception said, why do I want this—what's this got to do with anything—it doesn't fit—and even though I'm giving the same as I always do—if you're not ready you're not ready. (R1, p. 10)*

All of the instructors remarked that the shear size of the formal evaluations presented difficulty in obtaining high quality feedback. In addition, the fact that the evaluations are conducted at the end of the program when participants are tired may also have an impact on the responses.

> *If they get tired they just do the one to five the soft questions, the boxes, which is a much more general thing, and you don't hear the stories. But then there's the last page, any final comments and people will put things in there. (R1, p. 13)*

The instructors have been making efforts to address the deficiencies in the current formal evaluations.

> *We tried to rewrite the whole evaluation thing this last time cause it's so long—it's like ten pages long and huge lists of questions on each teacher on the program in general and you know they get tired half way through and half way through those evaluations might not be as real—maybe after a while they get bored so there's even a little attrition in their attention on those. (R1, p. 10)*

All of the instructors mentioned that one of the most useful types of feedback was the immediate feedback provided during each classroom session. *"He was really direct about it and I like that because we have something to work with then, if I don't get the feedback I can't help" (R1, p. 16).* This feedback was often overt in that it was articulated clearly, or it was evident in the general tone or energy level present in the room. In this latter form the feedback required the instructors to be readily attentive to the participants as this type of unspoken feedback was often the most accurate and the most useful.

> *I tell them right at the beginning you know I'm a guide here you're the authority, if something doesn't fit don't do it, give me as much feedback as you can on what's working. (R1, p. 9)*

One interesting way in which participant feedback was displayed was in the theatrical presentations conducted at the end of the program. *"They placed it into their theatrical drama in some way or another—I mean that's almost the best feedback" (R1, p. 15).* Since the theatrical performances are a culmination of the week's effort by each participant to understand and to express those understandings about some of the difficulties in being a leader, feedback from those performances was considered to be particularly informing. *"...you get a whole bunch of evaluation from them at their presentations—they use things you taught them so you know what they liked" (R1, p. 11).*

The immediate feedback received during the classroom sessions was often described by the instructors as being the most meaningful as this feedback frequently embodied the greatest personal discovery.

> *I feel very rewarded when I'm getting people who are saying in the middle of my session, saying wow, I never knew that, or geesh I can really use this, or when I'm talking there's absolute silence and people are actually engaged in what I'm saying and I really feel I'm making a difference, and I'm really wanting to give them more cause they're just so engaged. (R3, p. 6)*

Feedback was also described as being particularly relevant in the MLC program because of its diversity of sources, and how the instructors dealt with it. Feedback was encouraged on the formal evaluation forms, during the sessions, during the social times, and in a variety of forms from written comments, emotional statements or from subtle changes in classroom energy. All of the instructors indicated that they were attentive to the feedback and made considerable efforts to address it either immediately during the program or in planning meetings that followed each offering.

Reflection and Communication

A formal planning meeting was typically conducted two weeks after the most recent program offering and included both the instructors and the administrative team. The meetings provided the instructors and the administrative staff the opportunity to reflect on the previous offering and communicate openly about the various aspects of the program, in particular the program evaluations.

> *...we try to have that meeting the moment we have all the correlated evaluations—so maybe two weeks after the program—and when everybody's got it we look at it and we look for the flares. (R1, p. 12)*

This scheduling allows time for the correlation of the evaluation data and provides the instructors with the time to reflect on their most recent teaching experiences. It also provides the administrative team with some time to devise solutions to any obvious and particularly problematic administrative issues. The overall purpose of these meetings was to debrief on the last program offering and discuss how each of the various program elements had gone, how they could be improved, and their integration strengthened. This opportunity to communicate to each other was frequently referenced in the interviews as a critical part of the program, as it allowed instructors who did not typically work alongside each other, a formal venue to openly discuss ideas, problems and solutions.

One of the strengths of these meetings was that everyone who was involved in the program had the opportunity to provide input. The inclusion of all staff members in these events supported the MLC program's holistic approach to learning. Input is provided from numerous sources including participants, instructors and program coordinators, and allows for a diversity of perspectives in voicing feedback and in achieving informed program changes.

The open and dynamic nature of the planning meetings was evident in a number of the comments provided by the instructors, and it was clear that all of the instructors had a voice at the table.

> *I was very surprised how much input I did have because after every session we always had a debriefing meeting, everyone is encouraged to participate, and I don't think anyone is given more voice than anyone else or more emphasis. (R5, p. 3)*

When problems did arise, the instructors described the approach taken was not to assign blame to anyone, but to work collaboratively to develop unique or creative solutions that not only resolved the particular problem, but that were also consistent with the program's goals.

> *In any planning meeting I've ever been in the approach was always... ...can you suggest something that you think might help accommodate this situation. So there was always this open, tell us—tell me—tell us around the table... ...everybody had a say. (R1, p. 7)*

The planning meetings also provided the opportunity for instructors to speak about topics that were not their own. This ability contributed to the integration of the program elements as it allowed the instructors to "work on the edges".

> *If I felt it wasn't an area of my program... ...[Peter] might turn and say, what about you—do you have any feedback on this? So that everybody knew that they were integral to how it runs even if it's not your area. (R1, p. 8)*

It is interesting to note that while the debriefing sessions were very clearly planning meetings as described in the literature on program planning, very few of the responses from the instructors indicated that they felt they were actually involved in planning. More often the instructors felt they were using a combination of their own expertise and their own values to formulate how their individual components were conducted.

I don't really have a step wise process that I go through, I think it's just a matter of having your ears open—being very attentive to your audience... ...if I think they've picked up on something that I haven't addressed that's consistent with the theme I'll be very serious about getting that into the planned program or somehow during the week... ...I'm taking in information and feedback from them and figuring out what to do with it. (R5, p. 11)

<u>Flexibility</u>

One of the most pervasive planning considerations described by the MLC instructors is their willingness to be flexible in how the program events are planned whether between consecutive program offerings, or within each specific offering. With respect to the planning process, *"I certainly think it's open, flexible and dynamic" (R1, p. 2).* The instructors frequently referred to changing their content, delivery or the time frame of what they were teaching to suit the needs of each particular class.

The first time I remember doing this session I had everything planned for the week, after the first session I scrapped that and I redid it and I was just planning day by day and that's exactly what I do now. (R5, p. 4)

The instructors learned that in order to respect the needs and values of the participants it sometimes meant abandoning their carefully constructed course material. It was consistently reported by the instructors that if change was required in order to address participant needs, the instructors would make this accommodation.

I'd say flexibility is the first thing that comes to mind... ...a different way of delivering and it was completely dependent upon the group that I saw in front of me and how they were receiving certain things—what they responded to more or less—so it for me that was the biggest lesson anyways, just the ability to be flexible. (R5, p. 4)

A willingness to be flexible and to "plan on the fly" was not only appreciated by the class, but was described by the instructors as essential to the success of the program. Since a cornerstone of the program is to focus on the unique values that each person brings to the program, this by necessity requires an adaptive planning model where any component of the program can be changed at any time to reflect the needs of the group, while still maintaining the overall program goals. *"I think it's important to be confident about your theme or the message you want to deliver so you need to have clarity on that, but you also need to be able to adapt..." (R5, p. 4).*

<u>Emotion</u>

The flexibility evident in the MLC program's planning and instruction supports one of the program's goals which was to use the exposure of emotions as a tool for discovery and learning. It is important to, *"let them have the experience so we can have people practicing on all levels—emotional and intellectual and physical" (R4, p. 16).* Since emotions are by their very nature difficult to predict this requires an adaptive approach to planning. Emotions are exposed and dealt with in a way that allows learning to happen in both a personal and deep way, and the instructors reported that this was essential to the success of the program.

> *My goal right from the beginning was to help them move to the edge of their intellectual and emotional frontiers so they could take a step that in a solid way—not a way that would put them, you know over the edge, but in a way that would be able to sustain them... ...that would let other people learn from them rather than staying in their comfort zone. (R4, p. 2)*

Abandoning comfort zones was consistently reported as one of the major obstacles for some program participants. While some participants eagerly embraced this approach, many others found it difficult to leave their regular lives behind long enough to become immersed in the kind of program content that would elicit the desired emotional reaction.

> *Some people, they had no idea it would be such an emotional rollercoaster, that there would be all of that other stuff around it. Some people still come in trying to check messages during the breaks and plug in at night and I think most of those have to abandon it because they realize you can't have both... ...we won't let you have both. (R2, p. 34)*

One of the methods used to overcome this reluctance to become involved was to use practical examples or stories from past experiences, so that even the more reluctant participants could begin to make the kinds of connections to their own lives that would make learning possible.

> *I encourage people to tell a story... ...and people get very good at doing that and it makes that connection, and as soon as that connection is made—that emotional connection—I think all the lights go on and everybody says wow you know what, that is so, that's my life. (R2, p. 33).*

The very nature of the MLC program with its focus on isolation and immersion helps elicit an emotional response because it provides the venue and opportunity for a distinctive type of learning, something that most busy professionals never have the opportunity to become involved in.

> *When you're in your mid forties or fifties and you're taking time away from your family to and your job to just work on yourself and to think about the things you've been dealing with and the stresses that you have and how you can become better and step back from all your problems a bit and then get your focus to go back in—I think that alone—gets people fairly emotional because they've never had the time to think about these things and work on themselves. (R5, p. 7)*

Ultimately, the process of exposing emotions and allowing their exposure to assist in deeper learning and discovery was one of the qualities consistently reported as being part of each instructor's enjoyment of the program.

> *I get a positive emotional reaction from our students, I feel like I've done the right thing and so it's very rewarding, at the same time I also feel liberated because they're going into their emotion—they're going deeper than they normally would. (R3, p. 9)*

<u>Instructor Selection</u>

The instructors frequently referred to their enjoyment of being involved in the program and their excitement of being chosen to be part of the instructional team. Their selection did not seem to simply rely on circumstance or convenience, but rather was part of a careful process whereby Frost selected instructors not only for their content knowledge and instructional style, but also because they possessed a commitment to learning and a willingness to engage the participants in a process of introspection, awareness and personal discovery.

The instructors' commitment to learning was described in the interviews as being an important part of their program experience.

> "... *It was important that the team be as committed to learning as we want the participants to be committed to learning and that means building in time for debrief and learning from ourselves and using that learning as we evolve the program...*" *(R4, p. 13).*

All of the instructor's reported that an important part of the program was what they learned about themselves, about the participants, and about how all of the various program elements came together to support common learning outcomes.

> *I ended up learning a ton on teaching my component, learning from the participants as they're going through the week, they're learning things and it's kind of spilling over into our sessions, they're talking about things and then I'm seeing how my component of the program is, you know, feeding into that and I never really expected that so it's like what I got back was much greater than I ever expected! (R5, p. 2).*

The interview data suggested that the instructors' feelings about their own learning was common among all of the instructors regardless of their own beliefs about instructional methodology or planning processes. While none of the instructors considered themselves program planners per se, they all agreed that what they were doing during the program meetings and within their own program design activities was an integral part of program planning. The way in which the instructors spoke about planning also did not follow any particular planning model, but was more broadly based on actions that were reflective of their own individual values. In addition, the instructors described their relationship with participants as one predicated on the participants developing and understanding of their own values in order to achieve the program's learning objectives. As a result, a commitment to learning and to understanding values underlies many of the instructors' decisions and actions, and was an important feature in their selection as instructors.

Values also played an integral role in the selection of the instructional team. Most of the instructors described the team selection criteria as being partly based on content knowledge, but also based on an inner value or desire to push the envelope with the participants in order to find new discoveries and new ways of understanding. This value was exemplified by Frost as the instructors were chosen based on his interpretation of their willingness to push the boundaries of traditional university executive education, in order to find new ways of understanding. One of the instructors recalled a statement by Frost that reflected the extent of this belief, *"You know I'm sure the dean would have a fit if he knew some of the things that we do in this course" (R2, p. 30).*

The instructor's responses to the interview questions consistently referred to the importance of basing their teaching on their own personal values. *"I think the most rewarding part of the leadership challenge is... ...I started recognizing in the pieces how much I valued, and [how much it] was consistent with my values" (R3, p. 4).* The interview data suggested that extricating the instructor's own values from those they display in the program would damage their integrity and destroy the possibility of establishing trust with the program participants.

> *I can't operate out of anything but my own values—so I can't offer anything that isn't founded in that. So if I was asked to do something that really conflicted with that I wouldn't really be able to do it. I think it would be impossible on one level to become something you're not... ...if I was asked to do something that was a clear conflict I also wouldn't feel I'd be able to maintain my integrity, and I couldn't treat myself that way. (R1, p. 4)*

Some instructors voiced an even more emphatic response when asked about the importance of incorporating their own values into the curriculum. *"I would state the issue even stronger* *than you stated it, it wasn't just consistent with my values, it really helped me understand my values" (R3, p. 4).* This statement reflects not only the importance of values in the planning process, but also the willingness of the instructors to expose their own values and understandings in order to address the needs of the learners.

The nature of values being a core or fundamental belief in how things are understood and communicated was evident in the interview responses in that some instructors indicated that they were not consciously thinking about expressing their values in their classes, but that values were communicated much more subtly.

> *I think the way it comes out is you know here's someone talking about this and presenting to us this material and I think his values are this because of the way he presents himself—that's the way I think it is—it's more my personal style in the way I present and the things that I reinforce and it's not a conscious thing that I do. (R5, p.4)*

Whether the instructors were consciously aware of how their own values affected their behaviour in the program, or whether their values were understood more subtly, it is important to recognize the influence that values can have not only on the instructor selection process, but on the entire the planning process.

<u>Summary</u>

This chapter detailed a variety of planning considerations or themes that were described in the interviews, and represent a number of different ways in which to understand the role that moral and ethical values play in the planning process. Gaining a greater understanding of the role that values play in the MLC program, however, requires that an analysis of the nature of each consideration described in this chapter be undertaken.

A preliminary analysis of the planning considerations presented in this chapter provides a relatively straightforward way to group each consideration into two readily identifiable categories, specifically, those based on personal characteristics and on structural program elements. Planning considerations such as location or content integration can be categorized as structural program elements as they can be readily addressed in many programs and their benefits are relatively well understood. Other considerations such as emotion or energy are more reflective of complex personal or individual characteristics and do not easily translate into other programs. As a result, these categories can provide a useful starting point to understand how planning considerations are reflective of a variety of different values.

However, despite the apparent usefulness of these categories, they will not be discussed further in this study. The rationale for this decision was that upon deeper analysis it was found that in the MLC program all of these considerations were effectively functioning as program features since they all played a role in the overall program design and in achieving the desired learning outcomes. Since the goal of this study was to better understand the role that values play in the planning process, it was important to focus on values as the analytical basis.

Each of the planning considerations described in this chapter was reflective of a variety of different values, and the analysis sought to explore the nature of the values that are reflected in each consideration. Specifically, the discussion in the following chapter focuses on the extent to which each consideration is reflective of a moral/ethical value or a pragmatic/instrumental value, and it is on this basis that the final chapter will draw some conclusions about the role that moral and ethical values play in planning an adult education program.

CHAPTER 6
DISCUSSION

The purpose of this chapter is to organize the themes developed in the research findings based on the extent to which they are reflective of moral/ethical values or pragmatic/instrumental values. This process involves analyzing each theme to determine the nature of the values it reflects. The discussion focuses on the importance that individual values play in the planning process, and on the nature of the values that underlie each of the themes.

While the focus of this study is on the role that moral/ethical values play in an adult education program, not all of the themes, or planning considerations, identified, were reflective of moral/ethical values. While these considerations were integral to the success of the MLC program and were reflective, in part, of moral/ethical values, they were also particularly reflective of values that were more pragmatic/instrumental in character. These planning considerations were described by the MLC instructors as being based on more practical beliefs about what means ought to be employed to achieve a particular end result.

The majority of planning considerations described in this study, however, are reflective of moral/ethical values, and are specifically relevant to the MLC program. Most of these findings are reflective of the individual moral/ethical values expressed by the instructors, and on how these values are reflected in the program activities and learning outcomes.

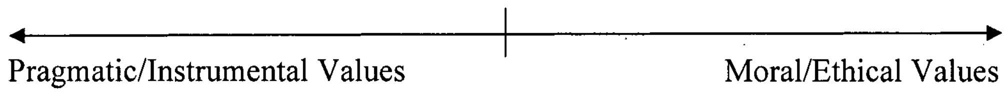
In order to develop some understanding of how values influence planning decisions in the MLC program, it is useful to restate some of the assumptions about morality, ethics and values that form the basis of this study. As discussed in Chapter 1, this study sought to determine the role that moral/ethical values play in planning an adult education program. This perspective was undertaken in order to help planners understand the complex environment in which they work. This perspective is based on the belief that planners will inevitably be influenced by their own values, whether more moral/ethical or more purely pragmatic/instrumental, when making planning decisions. Planners who act in ways that are consistent with moral/ethical values are acting in ways they believe are morally good. These actions are reflective of intrinsic values such as trust, respect and safety. Planners who act in ways that are consistent with pragmatic/instrumental values are acting in ways that serve a specific end result, and it is the desired outcome that is the focus. These actions are reflective of values such as isolation, immersion and flexibility.

A Continuum of Values

In order to organize the findings to be reflective of moral/ethical values and pragmatic/instrumental values, a continuum was developed that allows each planning consideration (or theme) reported in the findings to be located on the continuum according to the degree to which it reflects moral/ethical values or pragmatic/instrumental values (See Figure 1). In using this continuum, the question is not being asked whether each planning consideration is a moral and ethical one, but rather the degree to which each consideration reflects a moral/ethical value or a pragmatic/instrumental value.

One of the primary benefits of developing this continuum is that it illustrates the importance of values in program planning, and it can assist practitioners to better understand how individual values influence the planning process. The continuum is neither a model for program planning, nor is it a planning framework. The continuum is simply a device that allows for the diversity of findings that come from this study to be organized in a way that illustrates their relationship to each other and to moral/ethical values or pragmatic/instrumental values.

Figure 1
Values Continuum



Whether the basis for each planning consideration is related more to moral/ethical values or pragmatic/instrumental values was not the primary concern for the planners involved in the MLC program. From the planners' perspective these considerations were designed to achieve desired outcomes, and are used in an integrated and interrelated way regardless of the value that underlies them. As a result of this connection, it can be difficult to determine the location of the boundary between moral/ethical values and pragmatic/instrumental values.

On the left of the continuum are those considerations that are more reflective of pragmatic/instrumental values. These considerations may also have a relationship to moral/ethical values, but the extent to which they do is less. Moving along the continuum to the right are considerations that increasingly reflect moral/ethical values.

Planning Considerations Reflective of Pragmatic/Instrumental Values

Considerations reflective of pragmatic/instrumental values could benefit a wide variety of programs and audiences. These elements relate to practical actions that are based on achieving a pre-determined end-result, and are depicted in a variety of modern planning models. These considerations can be more easily set out on paper and communicated to planners in a relatively simple way, and are relatively straightforward to incorporate into new or existing programs. Such considerations allow planners to more easily observe their effectiveness, as the end result would be more overt (e.g., greater achievement on a test score) and would thus be easier to recognize.

Planning considerations reflective of pragmatic/instrumental values can be highly effective at achieving desired results, without necessarily requiring a connection to moral/ethical values. However, just because a planning consideration is primarily reflective of pragmatic/instrumental values does not mean it can not also be reflective of moral/ethical values. For example, a common planning consideration is determining the location of the program. One pragmatic/instrumental value that a program planner may hold is that by selecting a location that physically isolates students from outside distractions, they are better able to concentrate on the program material, and this may result in increased learning outcomes. In this situation, isolation can be structured into the program with the intention of the planner being that isolation enables students to focus more intently on program content, and by doing so students will achieve higher test scores. In this sense, isolation is simply the means by which a desirable end result is achieved, and it would be located towards the left end of the continuum.

However, if this program was a literacy program designed to teach adults basic English language skills, then it may also be reflective of more moral/ethical values related to care and compassion for individuals. One of the results of achieving greater learning outcomes in a literacy program might be that it provides a greater number of people the opportunity to achieve language proficiency. This can lead to a variety of benefits including increases in self-esteem, confidence, job opportunities, and so on. As a result, while the initial consideration may be more reflective of a pragmatic/instrumental value, it may also, inextricably, have a relationship to values that are also moral/ethical in character. In this example, the moral/ethical values of care and compassion for others is evident, even though this may not have been the immediate concern of the planner. As a result, it can be difficult to separate planning considerations that are reflective of pragmatic/instrumental values from those more reflective of moral/ethical values.

To interpret these effects fully would require examining more directly the intentions and motivations of the planner. Was the planner aware of all of the effects that isolation would have? Would the planner have acted any differently if they had a greater awareness of these effects? Planners do not work in isolation, and it is reasonable to assume that, in practice, there is some degree of interrelatedness between considerations that are more reflective of moral/ethical values and those that are more reflective of pragmatic/instrumental values. By definition, those individuals acting with good intentions are acting in ways that are reflective of moral/ethical values, and that those who are acting out of pure self-interest or with regard to purely pragmatic/instrumental considerations, are not. It is not, however, always possible to determine what the planner's intentions are when taking particular factors or principles into consideration when planning. Because this study did not specifically explore intentions, many of the findings are based on my judgments about the intentions behind the instructors' choices.

There is a variety of examples of planning considerations that were reflective of pragmatic/instrumental values that were described in this study, and these would be located on the left of the continuum. Examples of considerations that are reflective of pragmatic/instrumental values are requiring program participants to become immersed in program material, having various program content integrated into a comprehensive package, and incorporating a hands-on practical approach to instruction. On the surface, these considerations have substantial merit, and one could imagine many programs where these considerations would be beneficial. Such considerations would seem to be obvious choices as important elements in designing most training or education programs, and their inclusion in the MLC program directly supports the program's goals.

Planning Considerations Reflective of Moral/Ethical Values

In a planning environment, considerations that are more reflective of moral/ethical values such as respect, trust, compassion, and safety are located towards the right end of the continuum. Examples of these types of considerations that will be discussed in detail below are overall excitement for the program, expectations for program participants and instructors, the importance of self-awareness and self-discovery, and the use of feedback and instructor flexibility.

The MLC program requires participants to engage in a process of self-examination and self-discovery to determine what values are fundamentally important to them in a leadership context. To enable this process, the instructors sought to build trust with the participants, so that the participants were willing to share personal experiences with them. The instructors then worked with each participant to help them understand how those experiences were reflective of their own values and how that knowledge can help them understand what leadership means to them. As a result, the value of trust is a key part of planning considerations in the MLC program.

However, as discussed earlier, there is often a connection between considerations reflective of moral/ethical values and pragmatic/instrumental values, and this phenomenon is also evident when examining the consideration related to creating self-awareness. Trust could be considered a pragmatic/instrumental value in that it may have assisted with achieving desirable end results (meaningful learning outcomes). However, while the value of trust may have indeed had a relationship to an end result, this was not the primary intention of the instructors. In this study, the data suggested that there was a variety of reasons why developing trusting relationships was important, and they were not all related to a specific planned outcome. The data suggested that trust was valued in part, for its own sake, and for how it related to other planning considerations and other values such as safety, caring and compassion.

Ensuring the program participants felt safe during the various program activities required first that a trusting relationship be developed. It would be difficult for participants to feel safe physically, when engaged in activities using balance balls or yoga, or safe mentally or emotionally when disclosing personal experiences, unless the participants trusted that the instructors were acting in their best interest. So, while trust may have a connection to a desirable end result, its was primarily valued for its own sake, and for how it related to other values reflected in the planning considerations, such as moral/ethical values of safety, caring and compassion. As a result, the planning consideration of self-awareness and self-discovery is reflective of the moral/ethical value of trust and would be located more towards the moral/ethical end of the continuum.

The following discussion will attempt to locate each consideration on the continuum. The discussion will first focus on locating those planning considerations that are more reflective of pragmatic/instrumental values towards the left of the continuum, and will then move along the continuum to locate those considerations which are more reflective of moral/ethical values.

Locating Planning Considerations on the Values Continuum

Pragmatic/Instrumental End of the Continuum

Providing program participants with practical skills is a common goal of many programs and it would generally be considered useful by many students. Many programs attempt to provide participants with practical real life skills that they can take away and apply immediately in the work place or in their personal lives, and the MLC program is no different. The MLC instructors indicated that while many of the issues they deal with are complex, unique, and deeply personal, ultimately their role is to take those issues and provide participants with the tools to deal with them after the program ends. This type of consideration can be appropriately designed into most programs, and can be a primary consideration when individuals are selecting programs. In addition, this consideration is relatively easy to document and duplicate in different types of course offerings. For example, teaching adults in an English as a second language class may involve some theoretical components of the language or some personal understanding of how each person learns, but ultimately the focus is to provide people with the skills they can take away so they can cope in the real world. As a result, the planning consideration related to imparting practical skills is located towards the pragmatic/instrumental end of the continuum, because the value that is being reflected is one focussed on the end result (acquiring practical skills).

Integration of program content between different instructors or across different courses in a common program is another planning consideration that is more reflective of pragmatic/instrumental values. In this instance, the focus is on the end result of ensuring that each piece of the program puzzle fits together in a seamless way. As a result, acting in a way that is reflective of the value of integration can result in a curriculum that is more effective at achieving learning outcomes.

While integration was a primary goal in the MLC program, it has wide application among adult education program offerings. One could imagine that whenever different disciplines are involved in teaching a common subject, it would be useful for each discipline to have some relationship to the other. For example, a person learning about desktop publishing must understand something about how computers operate, how various software programs function and how basic design principles are used. In the MLC program this consideration related disparate disciplines (e.g., yoga, leadership training, nutrition) to each other, so participants could understand how a variety of mental and physical elements contributed to understanding themselves, and their leadership abilities. In both of these situation, it is not unreasonable to assume that an education program that integrated a variety of disciplines would be beneficial to participants. In the MLC program, content integration served as a means by which participants could gain a greater understanding of themselves as leaders, and as a result, this consideration is located towards the left side of the continuum.

Other considerations such as location contributed to the success of the MLC program by allowing participants to be isolated from outside distractions and to become immersed in their studies and in themselves. This consideration would also likely be beneficial to many other adult education programs, although it is unlikely that most programs would require the MLC program's level of immersion and isolation in order to achieve the various learning objectives. Immersion and isolation reflect pragmatic/instrumental values because they are used to facilitate a desirable end result (meaningful learning outcomes) and not because they necessarily have beneficial qualities in and of themselves.

It is possible to argue that being isolated is a negative feature for many learners who desire to learn in an environment that benefits from social interaction. In addition, isolation can cause a distressing disconnection between participants and their personal and professional lives. In the MLC program, immersion and isolation were balanced by numerous classroom sessions and social events, although the interview data did infer that some participants found it difficult to be separated from their work and families. This situation supports a point made earlier in the discussion that instructors acting on pragmatic/instrumental values do not always make decisions that have positive results.

The pragmatic and instrumental nature of the planning considerations discussed above cause them to be located towards the left of the continuum. As additional considerations are discussed, a shift begins to occur. The following considerations, while still being reflective of pragmatic/instrumental values, are increasingly reflective of moral/ethical values, and are thus located farther along the continuum.

Moving Along the Continuum

As additional planning considerations are discussed, it becomes evident that their location along the continuum is increasingly reflective of moral/ethical values. Planning considerations like being excited about being involved in a particular program is an example of one such consideration. This consideration is interesting partly because of its superficial benefits, but also because of what may underlie that excitement. Many people would appreciate an instructor who was excited to be teaching a particular class, particularly if that enthusiasm translated into an interesting and engaging classroom experience. While this does not imply that programs taught by excellent instructors who do not exhibit these qualities are not also positive experiences for program participants, the presence of these qualities has some obvious benefits. However, participants may be unaware of whether or not the excitement exhibited stemmed from a sincere interest in teaching this subject, an underlying commitment to learning, or if it was merely a superficial personality characteristic.

If the excitement exhibited by an instructor is solely based on a personality characteristic, it is difficult to draw any conclusions about the role that values play in their behaviour. However, an instructor may be acting enthusiastically because they believe their enthusiasm will have a beneficial effect on students. Acting in this manner may cause students to become more interested, more attentive, more engaged in the program content, and so on, and this may contribute to more meaningful learning outcomes. If this is the intention of the instructor, then this planning consideration could be interpreted as being more reflective of pragmatic/instrumental values that are related to outcomes such as greater student enjoyment and increased learning.

However, this consideration may also be reflective of moral/ethical values of care and commitment for the participants and their learning experience. The instructor may be motivated to act in this way because they care deeply about the program content and the participants. In this instance, this consideration would be more reflective of the moral/ethical values of care for the student and a commitment to learning, and would be located farther along the continuum toward the mid-point.

In the MLC program, the planning consideration related to the excitement shown by the instructors is also located closer to the midpoint on the continuum representing that this planning consideration can be reflective of both pragmatic/instrumental values and moral/ethical values depending on the intention of the instructor.

Planning considerations such as the expectations of the program participants are also located towards the centre of the continuum as expectations can reflect a variety of different values. Participant's expectations for the MLC program were largely determined by the nature, cost, structure and location of the program, all of which were communicated in the program brochure and located on the program website. Effectively and clearly communicating these facts is reflective of pragmatic/instrumental values, as the outcome is designed to achieve an accurate and effective marketing message, and it is important that participants understand what they are paying for.

Locating a residential program at a major research university brings with it certain expectations on the part of the participants about the type of experience they are going to receive. However, what makes this planning consideration complex is that the participants' expectations had to be modified when they realized that this was not a formal university lecture program, but one that required some deep introspection on the part of the participants in order for learning outcomes to be achieved. This occurrence has a number of effects that are reflected in both moral/ethical values and pragmatic/instrumental values.

Not clearly communicating the kind of learning experience students were going to receive violates the pragmatic/instrumental values of clarity and effective communication, and this can lead to conflict between student expectations and program goals.

The specific nature of the program could have been communicated to the participants in advance, but since a large part of the program was about self-discovery and self-awareness and about discarding one's preconceived notions about oneself, communicating these qualities in advance may have interfered with this process. So, while most education programs are careful to communicate specific expectations to participants for practical reasons (e.g., making sure participants get exactly what they pay for), the MLC program did not do this completely in order to facilitate the exploration and discovery part of the program.

By taking this approach, the consideration related to participant expectations may also have been reflective of moral/ethical values such as honesty and trust. The instructors were aware that modifying expectations required a certain degree of trust, and the participants needed to understand that the instructors were acting in their best interests despite not fully communicating the nature of the program to the participants in advance. The interview data suggested that some of the participant's reactions to modifying their expectations were negative, as some participants believed they had been misled about the nature of the program.

While the program's promotional material may not have fully prepared the participants for the experience they were about to receive, and this in many ways was intentional, the instructors were aware of the potential conflict and negative reaction this methodology might cause. In some respects, this approach could be seen as manipulative and deceptive, and this runs counter to the program's recognition of the importance of the moral/ethical values of honesty and trust. The interview data suggested that participants were aware of this issue, but most participants were eventually accepting of this as they began to understand the benefits this approach had to the process of self-discovery and self-awareness. However, in some instances this acceptance did not occur until later in the program and the interview data suggested that it did place a strain on the trust relationships that had been developed during the program.

As a result of the conflict and interplay between moral/ethical values and pragmatic/instrumental values evident in this consideration, it is placed along the continuum towards the mid-point representing considerations that are reflective of both pragmatic/instrumental values and moral/ethical values.

Another planning consideration that is located towards the mid-point of the continuum is symbolism. Symbolism was used in the classroom presentations to help individualize and personalize the program content. In this instance, symbolism represents a pragmatic/instrumental value since it is focussed on the end result of creating personal connections between participants and program content. The benefit of using symbolism is that even though a particular participant may not be able to relate directly to some specific program content or to one of the stories being told, they may still be able to make a relevant connection to the content because of what that program content or story symbolized. For example, some participants may not have enjoyed the sometimes difficult and awkward process of learning to stand up and make individual presentations in class. They could, however, understand the notion that "we're always on stage" in our professional and personal lives, and by understanding what public speaking symbolizes in life, it can have a significant impact on understanding its importance in a leadership context.

In other instances the program content itself supported the notion of symbolism. When yoga was introduced into the program, it had some direct physical benefits, but what is most important about its inclusion is that it symbolises or represents the connection between what is physical and what is mental. This connection supports an overall theme of the program, which is to take a holistic approach to learning. Understanding that many qualities contribute to meaningful learning outcomes is important. Yoga is simply a placeholder representing the idea that some individuals will draw from the physical qualities that yoga represents, and others will draw from its mental qualities. Some of the instructors would go on to argue that it is the spiritual quality that yoga represents that is the most important, or that all of the qualities that yoga represents supports the kind of deeper understanding of oneself that the program is based upon.

A key argument in placing symbolism on the continuum is that in order for symbolism to be meaningful, it requires a deeper understanding of one's own values, and it is not simply a reaction to a superficial event. On the surface, public speaking is simply the common occurrence of one person talking to others, and yoga is simply a series of physical exercises. In order for participants to understand how meaningful these activities are they need to understand how their own values react when exposed to what these activities symbolize. Do the participants understand that they are always on stage, and are thus at constant risk of being judged and criticized? Does the recognition of these symbols lead to negative emotional reactions such as fear or insecurity? If these symbols do elicit negative reactions then how does an instructor rationalize the introduction of these symbols with their own moral/ethical values of care, compassion and respect for the participants? In order for the instructors to deal appropriately with these situations, their actions must be reflective of these moral/ethical values.

As a result of symbolism being reflective of both pragmatic/instrumental values, related to creating personal connections between participants and program content, and moral/ethical values of care, compassion and respect for the participants, it is also located towards the mid-point on the continuum.

An important planning consideration in the MLC and one that supports a movement along the continuum is receiving and acting on feedback. This consideration is well described in the planning literature (Caffarella, 2002; Nadler & Nadler, 1994; Sork, 2000) and its influence in the MLC program is multi-faceted. The following discussion includes aspects of feedback related to how it was received and dealt with by the instructors, how reflection and communication were used to address student needs, and how the instructors were willing to act on the feedback in an immediate and flexible way.

The MLC program contains a formal planning/debriefing meeting at the end of every program and at the beginning of the following program. This planning process is designed to address feedback from program participants, staff, and instructors, as well as to discuss whether any program changes are warranted. During these meetings feedback was discussed from a number of sources including personal comments by participants, program evaluation forms, and careful observation by instructors of the energy levels in the class. Receiving feedback from a variety of sources and by a variety of means can help reveal a more complete picture of a participant's experience in the program and can help inform planning decisions. The instructors frequently described their desire to understand what was important to participants and to act on these understandings in a concerted way that addressed the participants' needs. The fact that the instructors sought feedback from a variety of sources is indicative of their commitment to understanding participant needs and to making changes to better address these needs. In this instance, this consideration is reflective of the moral/ethical values of respect and commitment.

During the planning/debriefing meetings the instructors described the nature of the discussion at the planning table as exemplifying a wide variety of personal values and beliefs about how participants needs should be understood and how the program should address these needs. The interview data suggested that the instructor's goal was not simply to lecture to program participants and the participants were simply required to sit and learn. The approach was much more supportive and reflective of the participant's needs, and these needs were described in the various feedback mechanisms used in the program. This approach showed respect for what was important to the participants, as well as a commitment to act based on participant needs. By addressing needs in this way, the planning consideration related to receiving and acting on feedback is reflective of moral/ethical values of respect and commitment.

However, as mentioned above, feedback is included in many planning models and its purpose is often to facilitate discussion regarding program changes and outcomes, without necessarily being reflective of any particular type of value. In the interviews feedback was described as a useful device to address participant needs, but it also provided information about a variety of other program issues such as class size, course scheduling, program cost, location, and meal selection. While these issues may have some indirect connection to participant needs and to the moral/ethical values mentioned earlier, they may also simply be sources of information for administrators to make practical decisions regarding reducing program costs or instructor time. If feedback is used as a means to serve these sorts of ends, then receiving and acting on feedback is a planning consideration that can also be reflective of pragmatic/instrumental values such as cost efficiency and profitability. While feedback may provide information to make these decisions, the interview data suggested that the primary role of receiving feedback was to address participant needs and was more reflective of moral/ethical values. As a result, this consideration is also located toward the mid-point on the continuum.

While the debriefing sessions provided an opportunity to address participant needs, they also provided an opportunity for the instructors to work together to make program changes based on the feedback they received. An important planning consideration evident in the MLC program was the reflection and communication that occurred in the debriefing sessions as a result of the feedback.

The interview data suggested that during the debriefing sessions the instructors discussed the feedback from participants in an open and honest way and were typically focussed not just on improving their own performance, and thus their individual ratings, but also on seeking to understand the basis for the participants' comments and actively searching out program changes designed to reflect the participant's remarks. The instructors placed particular emphasis on the written or anecdotal part of the evaluations as typically these remarks were the most honest and value laden. These comments were discussed openly in the debriefing sessions, and to varying degrees each instructor sought to understand how those comments might cause their own material and approach to change for the next offering of the program. In this instance, the instructors were willing to modify their own program content to accommodate the perceived needs of the participants, as well as to work collaboratively with the other instructors to ensure that any individual program changes made also integrated with the other program elements.

The interview data suggested that during the planning meetings the instructors exhibited a high degree of respect and trust for each other. Also, it was clear from the feedback that working together as a team to ensure that each new component was properly located within the program and properly supported by each instructor was of critical importance. In these situations, the instructors were displaying their own values about the importance of working together, not just as an instructional team, but as a community of people working together toward a common goal. In this way, the reflection and communication that stemmed from discussing and acting on feedback was reflective of the moral/ethical values of respect, trust and honesty. The instructors were open to criticism, new ideas, and suggestions about how to improve the program, and worked collaboratively to ensure any program changes fit with all of the program elements. The instructors trusted that their ideas and suggestions would be respected and received in a collaborative and supportive way and this supported their desire to be honest about how they believed the feedback should be addressed. As a result, this consideration is also located towards the mid-point on the continuum.

In addition to the feedback discussed during the formal debriefing meetings, one of the areas where the instructor's values emerged was in the ways in which the instructors received feedback from the participants during the classroom sessions. Instructors paid attention to the immediate feedback that was given verbally by the participants during the sessions, and were willing to act upon that feedback either immediately, or by making modifications to their presentations the next time that class met. In this context, promptly addressing feedback is a planning consideration that illustrates an openness to new ideas or new ways of doing things, a willingness to change, and a commitment to providing a learning experience that reflects participants' needs. The benefit of taking this approach to planning is that it allows the instructors to change program content, schedules and activities to suit a variety of purposes. This willingness to make changes and adapt to participants needs was evident whether the feedback was practical in nature, (e.g., not understanding some particular content that was being presented), or based on an emotional reaction to a personal discovery. The fact the instructors placed high importance on the need to listen, understand, and react to the needs of the participants in an open and flexible way is particularly reflective of moral/ethical values of respect for the needs of the participants and a commitment to learning. As a result, this consideration is also located around the mid-point of the continuum.

Consistent with the approach of observing and acting on feedback from participants was an interesting consideration that many of the instructors in the MLC program observed, which was to focus on the individual and collective energy in the classroom. While the observance of this consideration can be difficult, the instructors made a point to observe and act upon the energy levels in the classroom to help facilitate learning outcomes. The instructors were aware that different program content required varying levels of energy and the instructors modified their own content and delivery approaches in order to achieve the desired energy levels. What makes this approach particularly interesting is that energy levels are not easily controlled by the program participants and are more typically a fundamental reaction to various topics that are being presented and where those topics occur in the schedule. As a result, the energy emitted during a particular session is more likely a reflection of some core values and beliefs about the particular experience, than something the participants can modify at will.

Paying attention to energy levels in the classroom is a planning consideration that is reflective of values such as care and respect for the participants, as well as a commitment to learning. The instructors are aware that energy levels can affect a participant's ability to learn, and it is important to be diligent about monitoring the level of energy present in the classroom so that a participant's learning experience could be maximized. While paying attention to energy levels in this context can be related to maximizing learning outcomes, and thus considered a pragmatic/instrumental value, the interview data suggested that the intentions of the planners were to observe energy so they could more deeply understand and react to the needs of the participants. The instructors understand that careful attention to energy levels is a useful way of understanding participant needs that may not yet have been articulated. Participants may not be aware of their changing needs in the classroom, nor may they be able to speak effectively about what those needs are, should they in fact be realized. A commitment to observing, understanding and acting on energy levels present in the classroom can help the instructors better react to participant's emerging needs without those needs actually being articulated. As a result, this consideration is primarily reflective of the moral/ethical values of care and respect for the learner.

Program topics that require deep personal reflection or emotional reactions were often described by the instructors in terms of the amount of energy they require. The interview data suggested that, when participants are required to deal with their individual values and beliefs, it can be an energy draining process. The instructors are aware that energy levels must be observed and managed in order that participants can achieve the necessary discoveries and understandings, and that they do not go so far as to cause the participants to "burn out" and miss out on achieving the desired outcomes. In this sense, observing and acting on energy levels is reflective of pragmatic/instrumental values as it is related to achieving desirable learning outcomes. However, since the instructors described themselves as being diligent about observing and acting based on energy levels, and placing a high level of importance on this consideration, their actions are also reflective of moral/ethical values of care and respect for the participant's needs. As a result, this consideration is also located toward the mid-point on the continuum.

The planning considerations addressed thus far have a variety of beneficial qualities, and in the case of the MLC program these elements are directly reflected in a variety of pragmatic/instrumental values and moral/ethical values. As we move through the remaining planning considerations there is an increasing awareness of how these considerations begin to differ from those already located on the continuum, and how they are increasingly reflective of moral/ethical values.

Moral/Ethical End of the Continuum

One of the planning considerations described in the interviews that was particularly reflective of moral and ethical values was the instructor's encouragement of self-awareness and self-disclosure. This consideration was important because in order to achieve the program's goals it was essential that each participant understand at a fundamental level what they represented in a leadership context, and also that they would be free to speak about it with their classmates. The data suggested that the instructors were respectful of the participants as individuals and of their personal and professional place in life. This consideration is reflected in the moral/ethical value of respect, as the instructors place a high value on the issues that are fundamentally personal and important to the participants. In addition, showing respect for the participants facilitates the participant's willingness to engage in the process as it helps show that what each individual is discovering is important. The data suggested that, at some level, the majority of participants identified with the benefits of this approach to education and became active and engaged participants in the process. This process exemplified other moral/ethical values such as care for the participants and trust, as the participants trusted that the instructors were acting in the participants' best interest. Developing trusting relationships is a critical consideration because it acts as an enabling factor allowing the planner to make significant decisions about program content, delivery and learning outcomes, without the participants having to fully understand and consent to each step. Planners who act in ways that are caring show commitment to the welfare of their constituents and will be deserving of their constituent's trust.

Facilitating the process of self-awareness and self-discovery was the creation of a safe learning environment, and the moral/ethical value of safety played a key role. While safety in this context can refer to keeping participants physically safe as they participated in the physical aspects of the program (e.g., yoga, balance balls, etc.), it also relates to creating a safe place mentally and emotionally. Creating a safe place mentally and emotionally was critical in order that participants would be comfortable sharing personal thoughts and experiences with others, whom only a few days earlier were strangers. Creating an environment where self-awareness could be realized and self-disclosure could be supported was essential in order to achieve the kinds of deeply personal learning outcomes desired in the MLC program.

It would be difficult to imagine that a planning consideration related to self-awareness and self-disclosure would typically be part of other programs. For example, would this consideration be relevant or even possible to address in programs designed to teach financial accounting to business students, or in an apprenticeship program that taught welding or metalwork? While this comparison may make for some interesting discussion, the fundamental point is that planning considerations related to self-awareness and self-disclosure are supported by moral/ethical values of care, respect, trust and safety. As a result, the planning consideration related to fostering self-awareness and self-disclosure are located farther to the right (past the mid-point) along the continuum.

Consistent with the planning consideration discussed above are other considerations such as the need for the instructors to establish priorities regarding their own time. Establishing these priorities was described by the instructors in many aspects of the MLC program, but one of the most poignant examples regarding the instructor's time was their willingness to offer their own time outside of the classroom to assist participants with their own understandings of the program content. The instructors uniformly placed a high value on the participant's learning experience and were frequently willing to spend more of their own time with the participants during the breaks in the program and also during the social events. This commitment to spend their own valuable time to support the participants is reflective of the moral/ethical values of care for the participants, and is indicative of the values the instructors placed on learning and supporting the participants. In this sense, the instructors were subordinating their own needs in favour of the participant's needs. In doing so, the instructors were able to assist with the participant's learning needs and devote more time to dealing with the emotional reactions that resulted from personal discoveries, which were an integral part of the MLC program. While it is not unreasonable to expect a typical instructor to only make themselves available during times for which they are compensated, the fact that the MLC instructors gave so much of their own time is particularly reflective of the moral/ethical value of commitment to learning and to the participants' own needs. In addition, the fact that this commitment came at the expense of the instructor's personal time, is also reflective of the moral/ethical value of generosity. As a result of the moral/ethical values of care, commitment and generosity, the planning consideration related to establishing priorities for the instructors' time, is located towards the right on the continuum.

The planning considerations evident in the MLC program reflected the values of care, compassion, trust and commitment and were often described by the instructors as resulting in understandings and learning outcomes that were deeply emotional for both the participants and the instructors. As a result, emotion emerged as an important planning consideration in the MLC program. The resulting emotional responses did not happen by chance, but were based on planning considerations that carefully exposed individual values in a safe and supportive learning environment using a variety of instructional methods. As a result, the moral/ethical value of safety was a key part of this process.

The feedback from the instructors suggested that the basis for the desired emotional reactions was that in order to have the kinds of meaningful learning outcomes the program supported, it was necessary to expose individual values, and the exposure of core beliefs typically results in an emotional response. As a result, the kinds of learning outcomes that the MLC program supports often result from emotional reactions based on the exposure of individual values.

It is important to note that the exposure of emotions was not described as being the goal of the learning process, but a natural outcome to the exposure of individual values, and an understanding of what those values meant to the participants. Relying on observable emotional reactions is another planning consideration that is not typically part of executive education program offerings from major universities, nor was it a stated or promoted quality of the MLC program. The inclusion of emotion as a planning consideration in the MLC program was important since emotional reactions can be based on discoveries that stem from understanding one's values.

Exposing emotions in the learning process can be risky as the resulting discoveries may be deep rooted and very complicated to deal with effectively. This process required the instructors to be readily available to help participants deal with these kinds of issues. Using emotion as a planning consideration to facilitate learning objectives can be a complicated process, and this consideration was reflective of moral/ethical values of care, compassion and concern for the participants. In this instance, the instructors were not only exhibiting care for the participants, but they were also acting in a sensitive and compassionate way so that they could successfully manage the outcomes of an emotional discovery process. As a result, the planning consideration related to emotion is located toward the right on the continuum.

In order to deal effectively with many of the planning considerations presented thus far, it is important that the instructors selected for the MLC program share some common values about how such a program should be conducted. Instructor selection was a key planning consideration because it was important that not only the instructors be knowledgeable about their own content, but also that they be able to work collaboratively in an environment where personal discovery is fundamental to the learning process.

In Chapter 5 it was noted that none of the instructors considered themselves program planners per se, but they all understood that what they were doing in constructing and delivering the MLC program was integrally part of program planning. The instructors also indicated that they were not following any formal program planning methodology. However, this did not imply that their actions were without basis or direction. What emerged from the data was that the instructors were typically basing their actions on their own individual values and on what their experience told them was the right thing to do in each situation.

One of the values that was seen as critical to the lead instructor, Peter Frost, was to have instructors who understood the need to "push the envelope" and to move beyond a typical executive education program offering to provide an experience that was challenging both physically and mentally. To do so required that the instructors hold similar values, and the instructional team was selected, in part, based on this belief. This condition was not seen as something that could simply be required of the instructors after the fact, but was dependent upon values that needed to be pre-existing.

The notion of pushing people beyond their comfort zone is reflective of certain pragmatic/instrumental of achieving desirable end results. However, in order to accomplish this within the design structure of the MLC program requires the instructors to share many moral/ethical values such as respect, care, compassion and safety. The interview data suggested that in order for the participants to reach a level where they were comfortable to try new things and achieve new discoveries, they needed to be assured that the instructors were acting based on the participants individual needs and in their best interests. The instructors also needed to develop a high level of trust with the participants so that they believed that the instructors would keep them safe.

One interesting conflict emerged between the instructors' pragmatic/instrumental value to push the envelope in pursuit of growth and change, and their moral/ethical values of care and respect for the participants. All of the instructors recognized that at times they were presenting material to participants that could make them uncomfortable, and this could manifest itself physically, mentally or emotionally. The instructors were committed to the safety of the participants, but at the same time they understood that learning, making discoveries, and personal growth, can at times be difficult, particularly when individual values are exposed. While the instructors did have a high regard for the participants needs and values, this may not have always been evident to the participants at every point in the program, and this may have provided the basis for conflict.

Despite the potential for conflict, the fact that instructor selection was based in large part on the moral/ethical values of trust, respect, care, compassion and safety, that the instructors brought with them, results in this consideration being located to the right along the continuum.

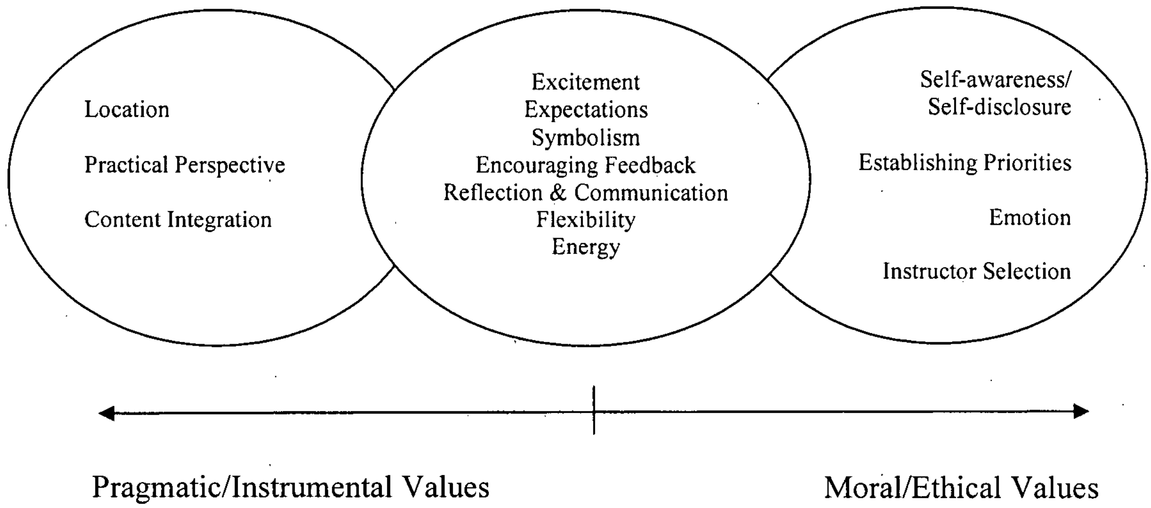
Summary

The preceding discussion frequently referenced the moral/ethical values of trust, respect, care, commitment, compassion, and safety in order to help expose the individual values of the participants in the MLC program, and it is not coincidental that planning considerations reflective of moral/ethical values were effective in exposing participant values. In fact, it is likely because of such considerations that the MLC program is successful in achieving learning outcomes that are reflective of individual participant values. These planning considerations were described by the instructors from a variety of different perspectives and have been associated with a multitude of individual learning experiences, all of which are central to the success of the MLC program.

The continuum presented in this chapter is a useful way of illustrating the degree to which planning considerations are reflective of pragmatic/instrumental values and moral/ethical values, and the influence values can have on the planning process. While each consideration is located on a certain part of the continuum, it is understood that each consideration does not operate in isolation, but that they work together in an integrated and supportive way to achieve an overall program quality.

The planning considerations described in this study reflect a variety of values that influence the planning of the MLC program. All of these considerations are influenced by individual values regardless of their basis. The planning considerations have been assembled in Figure 2 in their relative location on the continuum based on the extent to which they reflect pragmatic/instrumental values or moral/ethical values.

Figure 2
Location of Planning Consideration on the
Values Continuum



There are several observations that come from establishing the location of planning considerations on the continuum. The first observation is that all of the considerations do in fact reside somewhere on the continuum, supporting the belief that a wide variety of planning actions are reflective of individual values regardless of their basis, and regardless of whether the planner is aware of that fact. In addition, it is also evident that the majority of planning considerations are located toward the centre of the continuum representing considerations that are reflective of both pragmatic/instrumental values and moral/ethical values. This interpretation of the values basis for the planning considerations evident in the MLC program is not surprising, in part, due to the MLC program's focus on exposing individual values in the learning process. However, the primary observation that comes from the clustering of considerations around the centre of the continuum supports a belief about the complexity of the planning environment. If we are to better understand the complex planning environment by learning more about the influence values play in the planning process, it is particularly important to understand more about the interrelationship between considerations reflective of pragmatic/instrumental values and moral/ethical values because the majority of planning considerations encountered in the MLC program are indeed reflective of both.

CHAPTER 7
SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

This chapter presents a brief summary of the study and provides some conclusions and recommendations for further research. The goal of this study was to discover what role moral and ethical values play in planning an adult education program. This study sought to determine the planning considerations that guided the development of the program, how values were reflected in these considerations, and ultimately, what influence values have on the planning process.

Summary of the Study

This study employed an interview methodology to help understand the role that moral and ethical values play in a planning context. The study focussed on program instructors who were actively engaged in the ongoing planning of a leadership training program geared towards mid to upper level executives. The interview participants were all experienced members of academia or industry and as a result provided a rich and detailed account of their planning experiences.

The findings in this study were organized into planning considerations, or themes, that were described by the MLC instructors. The themes were then examined to determine the nature of the values that were reflected in them. The result of this process led to the development of a values continuum which allowed each planning consideration to be located based on the extent to which they were reflective of moral/ethical values or pragmatic/instrumental values.

Limitations of the Study

This study was limited in a number of respects and this, in part, stemmed from the specific nature of the MLC program. The MLC program is a very exclusive, specialized, and costly program that benefits from a substantial amount of care, planning and guidance. As a result, the conclusions reached in this study may not necessarily apply to other programs that do not benefit to the same extent from these qualities. In addition, this study involved a single program, and it may be that this study is limited by generalizing the research findings with respect to other programs.

A primary limitation of this study, and one that is described in more detail later in this chapter, is the lack of program planning literature that deals directly with the role of moral and ethical values in program planning. Had this study benefited from a variety of ways to understand and interpret values in a planning context the findings may have been understood and reported differently.

Other limitations of this study stemmed from the fact that when this study took place, the MLC program was already fully operational. Had the study had been undertaken during the program's creation, the findings may have differed somewhat. In addition, the data for the study came from five of the nine instructors, and it did not include Peter Frost, the lead instructor, due to his illness. Expanding the number of interview participants may have caused additional findings to be uncovered or other sources of conflict to emerge. Further, none of the instructors was formally considered program planners, even though their actions were clearly those generally considered to be part of program planning. If the design of the MLC program had been solely dictated by a single designated program planner the findings may have differed considerably.

Conclusions

A number of planning considerations, or themes, emerged from the data and reflected the various planning and instructional activities evident in the MLC program. These considerations ranged from those that reflected pragmatic/instrumental values to those that were more reflective of moral/ethical values. Once the planning considerations were located on the values continuum a number of conclusions became evident.

One of the primary conclusions that can be drawn from this study is that values are indeed reflected in a wide variety of planning considerations in the MLC program and this supports the notion that values do in fact play a role in planning an adult education program. Values played a role in influencing the planning process regardless of whether these values were pragmatic/instrumental in nature, that is, designed to achieve a specific end result, or whether they were moral/ethical in nature and reflected values such as trust, respect or commitment. In addition, it was evident that values play a role in influencing the planning process regardless of whether the planners are actually aware of that fact. In the MLC program, the planner's actions typically stemmed from what their own beliefs and experience told them was the right thing to do, and not necessarily from any pre-defined planning model. As a result, values were inextricably part of the planning process in the MLC program and were influential in defining the experiences of the program participants.

When the planning considerations were placed onto the values continuum it became clear that the majority of the considerations were clustered around the mid-point on the continuum representing considerations that were reflective of both pragmatic/instrumental values and moral/ethical values. This phenomenon illustrates that the majority of planning considerations are indeed complex and are reflective of a variety of moral/ethical and pragmatic/instrumental values. This is not particularly surprising when one considers that values by their very nature are both complex and highly individual. Even in situations where the individual instructors' actions were consistent in reflecting certain values (e.g., respect for the learner) it is not possible to know what the underlying intention or motivation for this was or how it may have differed between instructors. As a result, understanding more about how intentions affect the nature of the values reflected in each planning consideration is important.

The planning considerations described in this study were often reflective of both moral/ethical values as well as pragmatic/instrumental values, and it is useful to distinguish between the nature of the values that are reflected in these considerations since it can help inform planning decisions. Moral/ethical values were defined in Chapter 1 as being intrinsic values, that is, they are not valued for the sake of their contribution to some desired end, but for their own sake, and as a result are considered to be "bottom-line" values and are non-negotiable. Trust, is an example of a value that is valued for its own sake and is absolute. There is no middle ground that can be negotiated such that it would not be in conflict with itself. In contrast, pragmatic/instrumental values are valued for the ends they produce, and not valued in and of themselves. Isolation is a pragmatic/instrumental value that serves as a way to remove students from outside distractions with the expectation that a desired result (increased learning outcomes) will be achieved. Negotiating the degree to which someone is isolated may impact these results, but the negotiation does not conflict with the notion that isolation can lead to desirable end results. As a result, distinguishing between intrinsic moral/ethical values and pragmatic/instrumental values can help planners to understand where negotiation can take place and where concessions may and may not be made.

Negotiation is a central feature of Cervero and Wilson's (1994) Negotiating Interests model, and the distinction between moral/ethical and pragmatic/instrumental values is particularly useful in this context. Cervero and Wilson state that, "Putting practice into its social context inextricably links planners' actions to the complex world of power relationships and interests" (1994, p. 28). Cervero and Wilson go on to define interests in terms of the goals, values and desires that cause people to act in certain ways. If, according to Cervero and Wilson, negotiation is a central feature of the planning process, and interests or values are one of the components being negotiated, then it can be concluded that understanding more about the role that values play in planning can help planners made decisions that better reflect the interests of those involved in the process.

By understanding the distinction between moral/ethical values and pragmatic/instrumental values, it can help planners understand which interests can be negotiated or "traded-off" and which cannot. Understanding how values influence planning practice and program outcomes may allow planners to be more conscious and deliberate in planning, and in particular, to design programs that are as much as possible consistent with their own values and the values of their constituents.

Another conclusion that can be drawn from this study was the need for a high level of commitment by the instructors. The instructors needed to be committed to the creation and integration of the various program elements, to each other, and to the participants in ways that were respectful, caring and compassionate. The instructors were also committed to their own values and to understanding the values of the participants, and this contributed to creation of a meaningful learning experience for the participants.

The MLC program first requires participants to know themselves, before they can learn how to lead others, and this process requires a significant degree of critical reflection on the part of the participants. Critical reflection requires that individuals become aware of their own values, and how those values influence their actions. To successfully move participants through the learning process, the MLC instructors embraced an approach to learning that was reflective of their own values as well as those of the participants. As a result, it is possible to achieve learning outcomes that are meaningful to participants by adopting planning considerations that are reflective of individual participant and instructor values.

Recommendations for Further Study

This study provides a basis for a variety of further studies to help expand our understanding of the role moral and ethical values play in the planning process. Some of these opportunities stem from the specific limitations of this study, and others stem from some of the more fundamental questions this study raises.

One of the primary areas for further research into the role that moral and ethical values play in program planning stems from the lack of a well developed body of planning literature that expressly deals with this topic. While this topic has begun to appear in adult education planning literature, it has a relatively broad basis and provides only general guidance of how to deal with such a topic. As a result, further research that deals with ways to understand the role that values play in planning, and provides ways in which to conceptualize values in a planning context would aid considerably in our understanding of the role that moral and ethical values play in program planning. Another implication of the lack of planning literature on this specific topic is that it may be beneficial for planners to turn to the literature on moral philosophy and to the work that has already been done on conceptualizing different kinds of values and their relationship to other factors influencing human action.

In this study, values were dealt with in an indirect way by observing how they were reflected in the various planning considerations evident in the MLC program. Further study that more directly addresses the role that values play in planning would also help our understanding of this topic. In addition, by understanding more about how values directly influence the planning process, we may be able to make some assumptions about what the implications are of such understandings, and this may help shape future planning practice.

Further study could also help overcome some of the limitations that were evident in this study. Limitations characterised by observing a single program and one that is already operational, are two such examples. By studying adult education programs in other contexts, or programs designed to have substantially different learning outcomes, it might provide insight into the usefulness or applicability of moral and ethical values in a planning context. While I personally believe that most planning happens in context in existing programs, observing how moral and ethical values influence the planning process in programs that are being designed from the outset might also prove insightful. In newly created programs, there is a much higher level of uncertainly and risk, and it would be interesting to see if these factors affected how moral and ethical values were addressed in the planning process.

Other aspects of further study might be to formally include the program participants themselves, as it may prove valuable to interview the participants to see if their views were similarly reflective of the importance of values in the learning process.

This study raised some more fundamental questions about the nature of morality and ethics in planning. One central question is whether it is appropriate to introduce considerations that are reflective of moral and ethical values into the planning environment at all. Would it not be more effective to let the knowledgeable administrators and content experts dictate what the learning outcomes should be, and the processes by which this learning should occur? How can we possibly maintain quality and equity among program offerings if we allow the participants to disrupt the process for their own individual purposes, and how could programs possibly supply the resources to allow such individualized learning to take place?

In our current environment, many programs are planned with such a scarcity of resources that attempting to act in ways that are reflective of moral and ethical values might simply prove impossible, or it might be that there are simply no expectations on the part of the administrators that such considerations be addressed. Without any real or tacit support for including these considerations, would any resource constrained planner bother to give them any attention? Are these considerations simply "nice ideas" that are relegated to only the most prestigious programs where knowledge, resources and skills are available to allow for their inclusion?

My personal belief regarding the role of moral and ethical values in a planning context is that as long as planning and programs involve people, they will inextricably involve the values that those individuals bring to the process. It is not easy, or even possible, to divorce our values from our intentions, and it is intentions that translate values into action. The key piece to understanding the moral and ethical values puzzle is that planners must be aware of the benefits to learning, and to learners, that planning considerations reflective of values can have, and they need the skill and desire to turn those values into actions.

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APPENDIX A
INTERVIEW QUESTIONS

INTRODUCTION

I am interested in learning about what role moral and ethical considerations play in program planning, and what implications they may have for shaping planning practice by understanding more about programs that are planned in a learner centred way which respect the values and interests of the participants. In this context it is the individual philosophies of the instructor/planner that are of particular interest, and how those philosophies relate to the planning and instructional activities. In this research planning is defined broadly and encompasses a range of activities from formal planning events examining needs, resources and goals, to instructional design, classroom activities, and evaluation and feedback.

<u>Background and Introduction to MLC</u>

1. How did you come to be involved with the MLC program? Why were you invited to participate?
2. Do you have any specific goals that you want to achieve by becoming involved in this program?
3. How would you characterize your understanding of the planning process that led to the current format of the MLC program?
4. What were your expectations regarding your own involvement in the planning process?

<u>Awareness and Understanding of Values</u>

1. There are a variety of ways in which to understand and undertake program planning. For example, planning can follow specific linear planning models, or take more principle based approaches focussing on fairness, democracy, equity, etc., or follow individual instincts about how best to proceed, etc.. What key values or beliefs about how planning should proceed do you subscribe to?
2. How important is it that your own values are reflected in the planning process?
3. How do you address the values, interests and needs of the participants in the planning process?
4. Are there any constraints that prevent you from addressing either your own or the learner's values and interests?
5. What are examples of planning issues in which moral and ethical considerations are especially important?

6. Were there any instances where your views on how to plan certain components of the program differed from those of the other planners? How did they differ and how were these differences resolved?

Evaluating Practice

1. What do you do to evaluate the program?
2. What is the goal of the evaluation process, and in achieving this goal, who had input into the evaluation criteria?

Shaping Planning Practice

1. How is this feedback used and how does it affect future planning actions?
2. How are the needs of the learners understood, and how do the program learning outcomes match those needs?
3. Outside of any formal evaluation process, do the learners descriptions of their experiences and learning outcomes match the data from the evaluations?
4. How do the planned activities support or contribute to the learner's experiences? What works well and what doesn't?
5. How would you describe your understanding of the connection between the learner's values and interests expressed during the program and the program outcomes? Do they match?
6. Are there any other issues related to planning or learner outcomes that you would like to share?

APPENDIX B

MEMO TO MLC INSTRUCTORS

To: Instructors, Meeting the Leadership Challenge Program (MLC)
From: André Gravelle, MA (candidate)
Re: MLC, Case Study Research Project
Date: February 14, 2004

Introduction:
I am a graduate student at UBC completing an MA degree in Adult Education with the Department of Educational Studies. I am interested in conducting a case study research project involving the **Meeting the Leadership Challenge** program, that would form the basis for my graduating thesis.

BACKGROUND:
During my MA program I had written a course paper on the MLC program and Peter Frost had kindly provided me with a rich and detailed account of the program, its participants and of the multidimensional dynamics inherent in the program instruction. These elements of the MLC program led to a fascinating experience for me and to a very successful course paper. Largely as a result of this experience I am interested in conducting a formal case study research project focusing on the MLC program.

Specifically, I am interested in moral and ethical program planning, whereby programs are planned in a learner-centred way that respect the values, diversity, and interests of the participants. I believe the MLC program embraces these qualities. I am also interested in the individual planning philosophies that underlie the MLC program, as well as in the variety of instructional experiences and the unique nature of the program's learning outcomes.

Benefits:
The immediate beneficiary of this research is me, as it would fulfill my thesis requirement. However, I feel it would also be interesting and informative to everyone involved and the experience could ultimately benefit the program and future participants. In addition, this research would contribute to the broader field of program planning.

Your Time:
To carry out this research a short interview (perhaps 45 – 60 minutes) would be required with each of you, with perhaps a couple of follow up questions by email. I will endeavor to make this time as efficient and convenient as possible, and I will ensure that all primary information obtained from you remains confidential.

Next Steps:
To move forward with this research, I am *seeking your approval in principal* to proceed with a formal research proposal to my faculty advisor (Tom Sork, Professor and Graduate Advisor, Adult Education) and to my research committee. I should note that Peter has already endorsed this research in principal, but asked that I seek approval directly from each of you. Should we proceed I would have specific research questions established and some detailed interview questions prepared, likely in 2 months time, at which point I would like to carry out the interviews.

I understand from Peter that the MLC program instructors will be meeting in a few weeks time for a debriefing session. If it suits everyone I'd be pleased to attend this session for a few minutes and respond to any questions or concerns that you may have. If, in the interim, you have any questions or would like more information or clarification on this project, please feel free to contact me.

I look forward to both a challenging and rewarding experience.

Thank you,