

Chapter 4: Collaborative Design and Recruitment

“You find twice the amount of life-giving nitrogen and phosphorus in plants that cooperate with fungal partners than in plants that tap the soil with their roots alone”.

(Wohleben, 2018, p.23)

Recruitment of supervisors

Meeting with supervisor colleagues – relationships first

The next step in the recruiting journey was to meet with my supervisor colleagues to invite them to participate in a short pilot in the summer, and potentially as supervisors in the full year of research.

I anticipated excitement about the research, a desire to participate, acceptance of my proposed process, and enthusiasm. Instead, throughout the meeting I met skepticism, worry and resistance. I managed to re-design in the midst of the discussion (Yanow and Tsoukas, 2009; Weick, 2004) while I listened carefully and responded to several of their concerns. I could see the validity and reasoning behind many of their points. I said I would respond to the remaining concerns in the next few days as I took in the totality of the conversation.

I sent an email the next morning with appreciation for their input and concerns. It stated “The most important take away for me may be the emphasis on the foundational principle of supervision...the most important relationship is among supervisor and supervisees. That is what I felt and heard yesterday—how to ensure the structure of the research is more in support of that essential relationship” (Downing, 2017b). The responses that came back were about my “grace” in the meeting, my openness, and my going forward by adjusting and negotiating. I had felt many things in the meeting and grace was not one of them.

Nepo (2012) defines grace as “when we can meet life with an open heart, receiving becomes indistinguishable from giving and we become conduits of grace” (p.49). In the receiving of their feedback, and the revisions to meet their concerns, there was grace. The reminder for me was that I had decades of experience as a facilitator, which had served me in that setting.

The revisions to the research process were numerous. They addressed the primacy of the supervisory relationships and the consistency in communication from the Sponsor to supervisees. They also began to address the consistency of concerns over the scarcity of time, and fear of using observational experiences. I intentionally prioritized my relationships with my colleagues by considering their input and modifying the processes to address their issues while keeping the viability of the research process at the forefront of my mind.

The challenges of insider-research require the ability to simultaneously be within the system of the Sponsor and stand back enough to “observe” what is going on, to manage the multiple roles of researcher and one’s organizational roles, and to manage the politics within the Sponsor (Coghlan and Shani, 2015; Coghlan and Brannick, 2014). The recruitment process tested each of these abilities. If the research-supervision experience was not a good one overall, it could impact the relationships among the supervisor and coaches within each group as well as with the Sponsor. Similarly, there was the risk to me that if the participants had a negative experience, I would lose or damage my relationships with them and with the Sponsor.

I was aware that the concerns raised by supervisors could reasonably be expected to be raised by potential participants. Based on this, I produced short informational videos and a Frequently Asked Questions (FAQs) document for the Sponsor’s website so there was a consistent and single source of information on volunteering to participate. See Appendix 5 for transcripts of the videos and the FAQs.

Ethical Considerations

I had concerns about the integrity of the data collection process and ensuring it was captured accurately and completely and then transmitted to me. I structured a process for integrity and control of data beginning with the following questions -

1. **Integrity of recordings**—How to manage the integrity of the recordings of the debriefing meetings and ensure my access?
2. **Collection of journaling**—What is the process for sending journal prompts each month? The journaling would go back to the Sponsor and then be sent to me. What influence might this have on what the participant writes? How would I ensure that the journaling was fully sent to me each month?
3. **Confidentiality**—How would I ensure the confidentiality of the data collected if it was also stored electronically with the sponsor?
4. **Informed Consent**—How to manage the process of getting the Informed Consents through the supervision center. It needed the same security that is used for invoicing, and payment and I needed to maintain possession of the originals.
5. **Permissions**—How to describe the permissions needed from the clients? Did I need written copies? Did clients become participants through the use of the recordings in a supervision session and if so, did they need to sign Informed Consents?

Working with the Sponsor, we devised appropriate procedures to resolve these concerns. The journaling was the most significant. To protect the confidentiality, I subscribed to Qualtrics, a provider of online survey software, for the data collection system. The journal prompts would be sent, using the Sponsor's name and logo, and the journal entries would be returned to my account. This protected the confidentiality of the data as I would be the only one with access to the data collected.

Recruitment for the pilot

Pilots are a best practice (Gray, 2018, p.240). I wanted to pilot the use of observational experiences, and the journaling requirements, to further inform recruitment and the design for the full-year groups. I was considering how to devise a pilot, given that the supervisors had declined, when two coaches, Sally and Aileen⁶, came forward, independently, to volunteer. They were both current supervisees, in an existing group that I supervised. They were enthusiastic and motivated by desires to work with me and contribute to the profession; they were willing to accept the responsibilities, including the obligations that at least one of them would bring a recording or a transcript, and both agreed to live-action coaching in the supervision session.

We had an exploratory call. The themes and questions they raised involved the minimum size of the group, my expectations for the structure and process of the sessions, and how the research requirements would overlay with the supervision process. I engaged them in the design of the pilot, and we collaboratively sketched how we could proceed. By the conclusion of the call, we had agreed to a three-session pilot, with one action learning meeting at conclusion, subject to their review and acceptance of the Informed Consent.

I modified the Informed Consent to reflect a Pilot of three supervision sessions and one action learning meeting. See Appendix 3.

My key learnings from the discussion and agreement were:

- **Importance of our relationships**—The participants in the pilot volunteered because of our existing relationships; they trusted me and wanted to support my efforts.
- **Expectations needed clarification**—The introduction of the research context required explicit contracting to confirm which standard supervision elements remained, and which new elements were required. This would be important to communicate to supervisor-participants.

⁶ Not their real names.

- **Prior supervision experience was useful**—Aileen and Sally were comfortable with the supervision structure; their focus was clarification about the research. The supervisor group’s request to recruit coaches with prior supervision experience appeared wise.
- **Process for recordings**—Sally had not recorded clients before and needed recommended processes for client selection, seeking client permission, the mechanics of recording, and options for transcribing. I would draft a set of guidelines and make them available to all participants.

The Informed Consents for the Pilot were signed and returned. (Note to you, the reader, the Pilot group became the Daring Group described in Chapter 5, when they agreed to continue beyond the initial three sessions and engage for the full year.)

Recruitment of Coaches

It was not a straightforward process to target segments of the alumni for the supervision-research groups. The recruitment email blasts and conversations were to only those already in a supervision group or who had previously engaged in supervision. Any coach interested in participating was asked to take initiative by watching the informational videos and reading the frequently asked questions document. If they were still interested, they were encouraged to explore participation with their supervisor and group. These efforts did not result in potential participants.

I stayed in contact with a supervisor and coaches who had expressed interest and indicated they would volunteer. I encouraged two of the coaches to reach out to the supervisor to explore forming a group. I encouraged another coach to continue considering recruitment of her existing group. My encouragement was in the form of answering their questions, talking with them about the content of the Informed Consents, and clarifying what was expected of participants. I was sowing seeds.

The Sponsor and I revised our agreements to increase the number of potential participants. The acceptable profiles were expanded—past supervision experience was

no longer required if the coach had at least three years coaching experience. Groups of fewer than 6 coaches could be formed, subject to approval of the supervisor. The Sponsor experimented with new ways of recruiting coaches specifically to join the supervision research; no one responded. Both the Sponsor and I were surprised that recruitment was this challenging. We had anticipated more interest and receptivity.

The Pilot group volunteered to continue to participate for a full 10 sessions over 12 months. I accepted with relief—I would have at least one group for the full year and they could continue to provide implementation experience, as they were 3 months ahead, if any other group joined.

In discussions with trusted colleagues, I was counseled that I was making a “really big ask” to bring in observational experiences, that it was “very exposing” and “very risky” for the participants, particularly because it was in a group setting. I remained interested in my inquiry. I considered my approach to research supervision as we practiced it, with an invitation to experiment at least once with each of the three types of observational experiences, to be feasible.

[Recruitment is Successful](#)

I continued in occasional dialogue with my colleagues who had expressed interest as early as April, and by late in September and early October, the seeds began to sprout. I supported the recruitment discussions they were having with prospective supervisors and groups. With approval of individual supervisors, I met with two of these groups. I was discussing participation with one of my existing groups. I was a colleague, a supervisor, a supervisee group member, a coach, a mentor, and/or a friend to the potential supervisor participants and to some of the potential coach participants.

My interactions as researcher required a level of care, self-awareness, and collaboration that was equivalent to how I was as a coach, coaching supervisor and mentor coach. In the meetings with the prospective participants, I was invitational and shared my belief that whatever emerged in a supervision session would be just what the research needed.

I explicitly stated my commitment to not negatively disrupt their supervision experiences. Using the experience of the pilot, I clarified the research requirements and encouraged them to co-design with their group how to integrate use of observational experiences.

My relationships and reputation within the community made the difference in the recruitment process. Colleagues with whom I had good relationships volunteered, and through their relationships recruited others. By the end of October, participants in four groups had agreed to participate and signed Informed Consents. I was the supervisor-participant-researcher for two of the groups, and two of the groups were supervised by colleagues. The research was launched; I was energized. The fifth group joined three months later, midway through their ten sessions. The newness of supervision in North America is reflected in the supervision experience of the participants and the experience of the supervisors following certification.

Participants' demographics as of Autumn 2017					
	Years following certification	Prior Supervision Experience	Actively coaching	Other roles	Gender
The Daring Group					
Supervisor 1: Kathryn	Coach: 8 Supervisor: 2	8 years		Supervisor External Mentor Coach	F
Coach 1: Aileen	1-5	3 years	yes	Facilitation and training	F
Coach 2: Sally	10+	1 year	yes	Facilitation	F
The Creating Community Group					
Supervisor 1: Kathryn	Coach: 8 Supervisor: 2	8 years		Supervisor External Mentor Coach	F
Coach 3: Bob	1-5	2 years	One internal client	In transition because of required retirement	M
Coach 4: Felicia	1-5	2 years	no	In transition from prior career to coaching	F

Coach 5: Debra	1-5	2 years	beginning to develop role— started with 5 internal clients during the year	HR & OD practitioner in organization	F
Coach 6: Andy	1-5	none	no	In transition because of required retirement	M
Coach 7: Candice	1-5	none	Yes	Facilitator and trainer	F
Coach 8: Ellen	1-5	2 years	no	HR & OD practitioner in organization	F
Most Tenured Group					
Supervisor 2	Coach: 20+ Supervisor: 3	20+ years		Supervisor Faculty Organizational role	F
Coach 9	10+	5-7 ⁷ years	Yes		F
Coach 10	10+	5-7 years	Yes		F
Coach 11	10+	5-7 years	No	organizational, doctoral candidate	M
Coach 12	10+	5-7 years	Yes	organizational	F
Coach 13	10+	5-7 years	No	In transition	M
Coach 14	10+	5-7 years	No	In transition	F
Newest Together Group					
Supervisor 3	Coach: 20+ Supervisor: 3			Supervisor External Mentor Coach	F
Coach 15	5-10 years	2 years	Yes	organizational	F
Coach 16	10+ years	none	Yes	In transition	F
Coach 17	10+ years	3 years	Yes		M
Coach 18	10+ years	3 years	Yes		F
Trio in Transition Group					
Supervisor 4	Coach: 20+ Supervisor: 3			Faculty Supervisor	F
Coach 19	5-10 years	2 years	Yes		F
Coach 20	5-10 years	3 years	Yes	In transition	F
Coach 21	5-10 years	3 years	No	In transition	F

Table 4: Participants' Demographics

⁷ Memories varied

Initial contracting with the participants

There were two levels of initial contracting with the participants: the first with the Sponsor for the delivery of supervision, and the second with me for the research. This is set out below in Figure 8.

With the agreement to participate, the coaches and supervisors had agreed to the standard supervision process as established by the Sponsor:

- Ten 90-minute supervision sessions over 12 months
- Ten 60-minute peer learning sessions over the same 12 months
- Virtual meetings using Zoom technology
- Usual and customary fees, payable by the coaches, in full, to the Sponsor
- Usual and customary fees, payable to the supervisors by the Sponsor

The coaches and supervisors had agreed to the research commitments with me as the researcher:

- Execution of the Informed Consent to document their agreement
- Respond monthly to journal prompts
- Experiment with the use of observational experiences
- Meet with me in three 60-minute action learning meetings

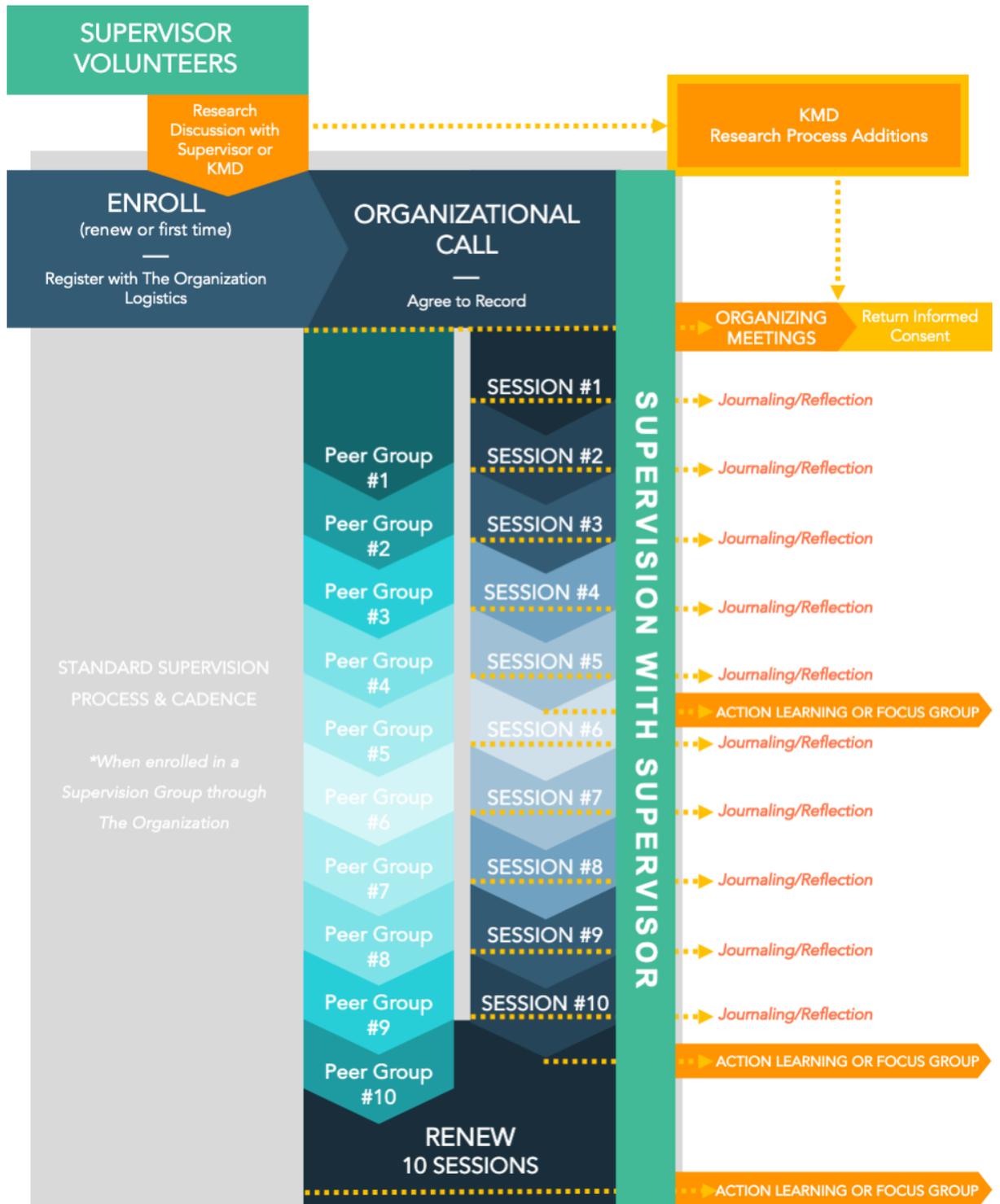


Figure 8: Initial contracting for supervision groups engaged in research

The standard time commitment for supervision was 25 hours. It was estimated the research commitment would add between 5.5 and 10 hours.

The Sponsor agreement remained fluid

The agreements with the Sponsor, with the groups, and with individual participants were fluid; we maintained strong working alliances. Revisions came through my reflections, through partnering with potential participants, and through what emerged in the organic process of supervision. Within each supervision group, some of the requirements of the research rubbed up against their commitment to their prior group processes, to what they noticed or knew about their own learning, or to the fears of exposure through the use of observational experiences in the group. In each instance those “rubs” were resolved in service to the participants’ learning in supervision.

In this Chapter, I have described the recruitment process and the careful contracting that was required with the Sponsor, the pilot group and the participants.

In the following two Chapters, Chapters 5 and 6, I share my turn to narrative inquiry, and the experiences of the two groups that I was supervising. In Chapter 7, I share the experiences of the three groups supervised by colleagues.