Chapter 12
Opening Space through Contemplative Practices: How Facilitators Foster a Field of Collective Learning

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ABSTRACT
This chapter compares and contrasts Scharmer’s Theory U with a grounded theory developed through extensive interviews with facilitators at the Shambhala Institute for Authentic Leadership summer program. The grounded theory of “opening space to foster a field of learning” describes four consecutive sets of practice illustrating how the facilitator creates an external environment conducive to emergent group learning. All the practices relate to opening space in the learning environment for authentic experience. In addition to the external environment, this research demonstrates the importance of a facilitator’s ability to cultivate an internal sense of openness and awareness.

BACKGROUND
For the past twelve years, the Shambhala Institute (now known as Authentic Leadership in Action or ALIA) has held a one-week summer program in Halifax, Nova Scotia, Canada. In 1998, the concept of the Institute was born when practitioners of the Shambhala meditation community began a dialogue with pioneering leaders in the field of organizational and social change such as Peter Senge, Otto Scharmer, Margaret Wheatley, Adam Kahane, Juanita Brown, and Art Kleiner. The group was interested in fostering a new model of leadership development that could build on the Shambhala wisdom training and whole-system change. Since 2001, 250-300 people from around the world annually attend the summer program.

The annual summer leadership program is unique as a learning environment on several levels. First, many of instructors at the Shambhala
Institute are long-term practitioners of Buddhism and many of them studied directly with Chögyam Trungpa, one of the first Tibetan Buddhists to teach in North America. Second, the program integrates contemplative arts and meditation practices based on the Shambhala tradition introduced by Chögyam Trungpa. Third, while transformation may happen at an individual level, all of the instruction at the Institute takes place within groups. The Shambhala Institute offers an interesting opportunity to investigate how facilitators create a dynamic learning environment for leadership development with eastern philosophical underpinnings. The goal of the Summer Institute is to provide an experiential learning environment that integrates tools of strategy and innovation combined with mindfulness and awareness-based practices.

Overview

In this chapter, I present a grounded theory that I developed by interviewing thirty-one facilitators at the Shambhala Institute for Authentic Leadership. Over two years, I interviewed facilitators multiple times, immediately following their experience in working with groups of adult learners. The grounded theory of opening space to foster a field of learning describes four consecutive practices illustrating how the facilitator creates an external environment conducive to emergent group learning. All the practices relate to opening space in the learning environment for authentic experience. In addition to the external environment, this research demonstrates the importance of facilitator’s ability to cultivate an internal sense of openness and awareness.

There are many parallels between the practices of this grounded theory and Scharmer’s Theory U process (2009a). In his theory, Scharmer describes five distinctive movements that make up the Theory U process: co-initiating; co-sensing; presencing; co-creating; and co-evolving.

Relating to Scharmer’s movement of co-initiating, the first set of practices describes how facilitators create a container that defines the learning space and holds the learners. At the start, facilitators give considerable attention to creating a hospitable and precise environment and welcome individuals to the space. Institute participants engage in daily sitting meditation and creative arts processes that encourage awareness of the mind and body. Sitting meditation involves relaxing the mind while paying attention to one’s thought process as well as sensory information. The contemplative arts extend that awareness into movement, listening, and interaction with other learners.

Occurring in the middle of the week, the second set of practices describes how facilitators hold the learning space open to a diversity of genuine experiences. This set of practices relates closely to Scharmer’s second movement of co-sensing. By sensing what is happening in the field of the learning experience, facilitators are vigilant to what is happening; they work to keep the space open by asking learners to stick with their own genuine experience rather than feeling coerced into a prescribed attitude.

Towards the end of the week, facilitators engage in a third set of practices that involve the facilitator fading away to allow the group to connect to each other within the collective space. There are many similarities between this set of practices and Scharmer’s third movement of presencing with respect to letting go in order to let come.

Finally, the last set of practices relates to Scharmer’s final movements of co-creating and co-evolving as they involve the facilitator fostering a global field of learning amongst learners, after they return to their home communities. Long after the program has finished, learners continue to support and provide nourishment to each other in creating social change around the world.

In addition to opening space in the external environment, this research demonstrates the importance of a facilitator’s ability to cultivate an internal sense of openness. This ability is strengthened by a regular contemplative practice.