Managing To Care,

The Emotional Dimensions

Of Formative Assessment:

Sustainability of teacher learner relationships in four case studies.

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Declaration

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ABBREVIATION AND GLOSSARY OF TERMS USED

AEHD: Adult Education for Human Development

AfL: Assessment for learning (formative assessment)

AI: Appreciative Inquiry

COP: Community(ies) of practice

Double duties: paradoxical demands or expectations

EI: Emotional Intelligence

Formative pedagogy *"The deliberate use of pedagogical relationships that enable learners to identify ways to move forward in relation to their own understandings of their world, the learning context and the negotiated outcomes of particular learning episodes" (Jones 2007).*

GPSPRS: General Practitioners General Practitioner Speciality Registrars / Trainees

HEI: Higher Education Institutions

H&P: Higher and Professional

H&PE: Higher and Professional Education

Shifu: A Shaolin term for Master / One who to whom others are apprenticed

Emotions (feelings that are expressed)

Feelings (what we experience)

Moods (feelings that persist) and emotional dimensions of the learning environment

Use-of-self: combining of professional knowledge, values and skills with aspects of one's personal self, in order to balance authenticity and genuineness within professional roles.

TUTOR PSEUDONYMS:

Researcher is known as R / LJ

GP tutor known as C

Kungfu tutors Known as Shifu-A (pilot) and or Shifu (case study)

5Rhythms teacher known as B Pilot tutor (P)

Undergraduate teacher known as M

LIST OF APPENDICES

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Abstract

This study is concerned with how educators, and their students, in different adult teaching and learning environments, engage in formative assessment and how development of capacities to perform a more holistic formative pedagogy might enhance educational processes potentially weakened by exclusive focus on rational processes alone. This thesis suggests that formative assessment could be enriched by affective approaches such as developing the use-of-self, emotional intelligence and relational skills. The central argument proposes that lecturers in Higher Education, expected to behave in emotionally neutral, predominantly rational, ways experience stressful paradoxical demands that unintentionally generate suboptimal environments for take up of feedback.

The emergent concept of formative pedagogy which promotes deliberate engagement with emotions, feelings and mood to "*refine principles of effective formative assessment, identify gaps and gather further evidence about the potential of formative assessment and feedback to support self-regulation*" (Nicol and Macfarlane-Dick 2006:215) is explored as one means of enhancing sustainable assessment for learning. It aims to create and maintain reciprocal, collaborative tutor-learner relationships which generate trust that feedback will enhance short term achievements and develop learner capacities for self-regulation.

A significant factor likely to enhance conditions for sustainable formative assessment is the promotion of teacher-learner relationships as caring collaborative spaces where shared commitment to learning outcomes and processes are authentic rather than emotionally neutral.

Four case studies, utilising mixed methodologies of observation, survey and interview generate broad descriptors of manifestations and expressions of reciprocal caring between teachers and learners in General Practice; 5Rhythms dance; Shaolin Kungfu and undergraduate medical lectures. Comparison between them illuminates potential staff-development needs and strategies for enabling medical (or other professional) educators and students to maximise effective use-of-self.

The findings endorse the introduction of balanced epistemologies into 'spiral developmental curricula' and the need for universities and medical communities of practice to adapt away from 'emotionally silent orthodoxies'. Concluding chapters suggest staff development programmes could "filch" (Newman 2006) curriculum ideas for educating educators in holistic formative pedagogies and promoting self-regulatory learners, most likely to make use of feedback.

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Some heart-felt thanks at the end of what unintentionally became a very long journey to:

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The many friends and teachers, without whom I could never have achieved closure for this long-term investment. I hope each experiences our relationship as reciprocal. To interested strangers such as Marion Burford, who generously shared many papers that enriched my process, and Victoria Martin and Maria Woloshynowych for their proof reading skills.

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 All my 5rhythms teachers, especially Sue Rickards, Cathy, Hilary and Andrew alongside peers in "and the beat goes on", who have witnessed my dance to overcome the multiple obstacles to completing this thesis. Special thanks go to Professor Bob Cowen at the Institute of Education for being an inspirational pedagogue and for his wicked sense of humour;

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CROSSING BORDERS AND CHANGING IDENTITY: A BRIEF REFLECTIVE STATEMENT ON MY PERSONAL AND PROFESSIONAL DEVELOPMENT THROUGH THIS PROGRAMME.

INTRODUCTION

In this reflective commentary I summarise and synthesise key elements of my learning; make links between the different components and provide examples illustrating how I have achieved some praxis between theories encountered and my current approaches to pedagogy. To aid coherence I have chosen a fairly simple metaphor of travel in search of professional identity. What was intended to be a journey of four years has taken a decade due to the significant changes in my personal circumstances and professional roles. Austin (2011:8) reports that many university teachers portray becoming a Higher Education (HE) lecturer as a crisis or baptism of fire because values, perspectives and commitment are tested. This reflective account identifies a few of the key themes and thinkers that have provided the consistent sense of safety and belonging that helped maintain my motivation to complete this doctorate whilst contexts and landscapes changed. I believe that my sense of self as a doctoral student provided me with ballast, a consolidated internal identity, as I struggled to navigate and adapt to different cultures and communities.

SITUATING MYSELF

> *"It was expected that the 'situatedness' of the practitioner-researchers dominated their research and by this we mean the work setting with its constraints of resources, time and so on"* (Costley and Armsby 2006:249).

Following a career as a specialist social worker and family therapist and whilst working as a National Advisor for CCETSW, the then Social Work Awarding Body, I began a Masters in Higher and Professional Education (MAH&PE) at the Institute of Education (IoE). Following redundancy in 2000, I developed and ran a small consultancy company called Learn2 Associates. When I enrolled on this Doctorate most of my work involved, education and training in the Social Care Sector and my professional identity was firmly fixed as a Social Work consultant / educator. All my initial assignments for the Doctorate

were relevant to Social Work education and drew heavily on experiential learning (see appendix A).

As a precocious doctoral student I presented the findings of one of my early assignments to a, Researching Work Based Learning, Conference in Sydney and realised I was a novice in the International Education environment. Whilst in Australia I was interviewed by video and accepted my first academic post as a Senior Lecturer, Workplace Learning, for the Royal Veterinary College, London. I returned to Australia and New Zealand, to gather data from all five Veterinary Schools, for my Institution Focussed Study (IFS). However my first experience within a Higher Education institution (HEI) proved extremely difficult as I was a lone educationalist in an institution dominated by what seemed to be a teacher–centred, transmission education culture. When I left the post after 16 months I had to set aside data collected for my IFS based on the development of reflection in veterinary education. I lost my newly formed identity, access to veterinary communities of practice and my confidence.

Fortunately some work as a visiting lecturer for the Bedfordshire and Hertfordshire PostGraduate Medical School (B&HPGMS) aided recovery of my sense of being a competent teacher. I reframed the focus of my IFS onto my passion for formative assessment and interviewed "experts" in Australia and the UK.

Having secured a (maternity cover) role as teaching fellow communication skills at Imperial College Medical School I began to adopt a new professional identity as a Medical educator. I returned to a full time post at BHPMS as Principal Lecturer Medical Education and Leadership where I have remained for five years. At B&HPMS I have struggled with frustration, as the team and workload continually expanded, and I was tasked with developing two new International MBAs in healthcare. My desire to focus on my own thesis was constantly thwarted by workload demands and only being able to visit my own research during holidays. I became aware of the paradoxical demands for scholarly activity without the resources to undertake research or study whilst developing the capacities of others to complete their Masters programmes.

In my current role I am course-coordinator for the Diploma and Masters, teaching on units such as evidence base medical education (research methods) and supervising research projects. I draw heavily on the resource materials and experiences provided and discovered during MOE1 and 2 whilst supporting medical professionals to recognise alternatives (qualitative approaches) to the positivist research paradigms dominant in their own environments. I have developed a reputation for having some expertise in the realm of feedback and formative assessment and have been invited to run master classes, for instance for London and East of England Deaneries. I now hope to find a role

in a staff development unit of a large Higher or Medical Education institution where I can retain my identity as an educator, develop a future identity as a researcher and begin to supervise doctoral students.

THE NATURE OF THIS ACADEMIC JOURNEY

Motivations for undertaking professional doctorates *are "complex and are not those of gaining a vocational qualification for a research career"* (Boud and Tenant 2006:*301)*. Maslow's (1970:64) seminal work on motivation differentiated between coping and expressive behaviours and resonates with my own journey. His former category is based on external, cultural and environmental determinants, often learned, characteristically designed to gratify or reduce threats and more easily controlled. Expressive behaviours are internally determined, often unlearned or dis-inhibited behaviours potentially an end in them self. His hierarchy of needs related to motivation has been helpful for personal self-analysis and also for understanding the needs of learners on professional education programmes. Through this framework I recognise how I am highly motivated to behave in ways that encourage others and recognise the intrinsic rewards I experience when I am in effective relationships with learners and teach in ways most likely to instil this in others.

My initial rationale for undertaking this "*complex and constantly changing journey*" were *not* "*narrow instrumental reasons*" (ibid p298) *but "the desire for personal satisfaction and intellectual stimulation and for recognition and acknowledgement by others of unique and sophisticated achievements is a central consideration" (ibid p293).* I have been driven by a desire to understand and articulate my tacit knowledge, deeply held feelings or beliefs about what seems to work for myself and others as lifelong learners and to develop the language and credibility that might enable me to participate in discourses and developments in an informed rather than merely experiential way. For instance, applying the theories of Marton and Saljo (1984) I can confidently refer to myself as having a deep approach to learning.

With reference to Eraut's influential work on developing professional knowledge and competence (2002) I can articulate my move from concern for a semi-profession to more generic interests in skills, knowledge and dispositions of educators. The modified focus from social work to medical education, from assessment issues and techniques to

the importance of relationship is evident in Appendix A: Summary of assignment titles and focus.

My direction of study and research interests have shifted in parallel with my roles and responsibilities, from assessment of competence and Accreditation of Experiential Learning (APEL) towards effective feedback and formative assessment before coming to rest on the importance of relationship and use-of-self within pedagogical encounters. During the final stages of this journey I have discovered concepts of emotional intelligence and emotional labour as relevant for professional development of adult educators. Going forward I aim to disseminate my findings and explore these concepts further. I am already integrating these concepts into my curricula for students on the Masters in Medical Educators and witnessing significant changes in their capacity to articulate the emotional dimensions of their pedagogic roles.

Entries in my travellers phrase book

Some of the most important and invaluable meta-concepts encountered during this doctorate are those which have travelled across boundaries with me. Boundaries traversed include informal / formal learning; assessment of learning / assessment for learning; the notion of "helping" in Britain and Slovenia and for my own development / towards the development of others. The sample below includes some of the most valuable terms.

Threshold concepts, troublesome knowledge and liminal language

Threshold concepts are "*a portal, opening up a new and previously inaccessible way of thinking about something. It represents a transformed way of understanding, or interpreting, or viewing something without which the learner cannot progress. As a consequence of comprehending a threshold concept there may thus be a transformed internal view of subject matter, subject landscape, or even world view*" (Land and Mayer 2003:1) Threshold concepts are usually transformative, irreversible and integrative but can generate threshold states where learner "*understanding approximates to a kind of mimicry or lack of authenticity*" (ibid p6). I used the concept of liminality in a presentation for the interview panel for my current position. The following quote highlights a link between the emotional dimensions of learning encountered through Land and Mayer's work and my thesis.

"*This transition however is often problematic, troubling, and frequently involves the humbling of the participant. In order to do so, he or she must strip away, or have stripped from them, the old identity. The period in which the individual is naked of self – neither fully in one category or another – is the liminal state' (ibid* 2005:376).

ACADEMIC REFLECTION.

Much of my teaching has focussed on developing the reflective writing skills of post graduate students. During this thesis I rediscovered Boud's (1985) seven stage model, encountered the clarity of Moon's (2001) guidance and have developed my own model for enabling students to understand what is expected from them (see appendix 2 – extract from one of my module handbooks).

HELPING

Help is a term loaded with cultural meaning. In UK "help" is perceived as a disempowering concept for professionalization of a semi profession such as social work. During my the comparative Education unit I spent one week with Ljubliana University (Slovenia), Social Work course team and discovered that "helping" is an organising principle for the curriculum. During study for my thesis I encountered Stein's (2009) use of this term as core to his revised view of (from hierarchical to distributed) leadership.

SUPERCOMPLEXITY.

I first used Barnett's definition of Supercomplexity, "*multiple and competing networks of consideration, influence and even force* (Barnett 2001:25) in MOE2 (See appendix A). The concept resonated with previously acquired knowledge of paradox and double-binds from my systemic family therapy training (e.g. Selvini et al.,1980) and has subsequently contributed considerably to my capacity to critique and synthesise competing ideas. During my IFS and thesis I have been able to articulate "double duties" in addition to Boud's and suggest we learn to manage these complex systems as Stacy (2010) suggests by enhancing the emotional intelligence of stakeholders.

RESEARCH METHODS (QUALITATIVE AND QUANTITATIVE)

Above all else undertaking this thesis has enabled me to deepen my understanding of research paradigms, epistemologies and methodologies. I now teach evidence based practice and have drawn extensively on the handbooks for MOE1 and 2 (For example

Openheim (2000) and Foddy (1993)) in supporting research students to critique evidence and develop methodologies fit for purpose.

SUSTAINABILITY IN FORMATIVE ASSESSMENT

Formative assessment only becomes sustainable when it "*meets the needs of the present without compromising the ability of students to meet their own future learning needs" (Boud 2000:151)* and when learners have a capacity to self-regulate. I became interested in this concept for decreasing dependency during my MAH&PE and it became central to my argument for developing capacities of university lecturers in training.

RELATIONSHIP

Noddings (1984) work on relationships and the principles of 3Rs (reciprocity, relatedness and responsiveness) suggests that *"carer and cared-for contribute appropriately"* in any pedagogic relationship (Isenbarger and Zembylas 2006:123). These concepts have confirmed and continue to shape the learning contracts I negotiate and role-model to my students and my conceptualisation of "formative pedagogy" which emerged from my IFS and is the phenomenon of interest in my thesis.

EMOTIONAL LABOUR

My literature review for the thesis brought me into contact with Hochschild's work on Emotional Labour (1993). It has provided me with a relevant concept to explain tacit knowledge, essential to the development of social workers and therapists but underacknowledged in HE. I aim to research further the potential application for deliberately developing educators' capacity for undertaking emotional labour as a means of reducing the stressful impact of double duties.

MEMORIES AND SOUVENIRS

I was specifically drawn to this International Ed.D with its diverse learners and broader horizons. I believe engaging in debates and classroom activities with peers from, for example Chile, Germany. Australia, Israel and America helped me become less dependent on practical experience and engage more fully with abstract ideas that bridge the different global approaches and practices to teaching and learning.

I found the comparative education module the most intellectually stimulating, enjoyable and challenging module. My paper "The social Invention of a profession" required me to engage with the less familiar sociological and economic issues that peppered the relevant discourses and literature and provided opportunities for visiting and working in a former communist country and later Australia. I now feel less dependent on insider knowledge, better able to formulate questions, to question my assumptions and problematize issues in a manner that generates space for academic argument.

During this module I first realised the importance of relationship and trust for how feedback is perceived. Highly critical feedback from Professor Bob Cowen enhanced my ability to self-assess and identify my need to apply far greater rigour to succeed at doctoral level. His extensive, witty, honest and human feedback (when I submitted a scant draft of FOP paper and no draft critique of the classroom game) included the statement: *"at this level of academic study you should produce precise sketches this is body painting"…* This generated a wide range of emotional responses including, indignation, laughter and a recognition that I felt honoured that he had provided such significant feedback to me personally. The impact of this learning event and the modelling of effective practice by a tutor with whom I felt mutual trust and respect can be seen in the focus of my thesis and I hope in my own style of providing feedback to students.

With hindsight I realise my focus for MOE1 and 2 catapulted me prematurely into the realms of insider research with all its complications and pitfalls. I am confident that I managed the complexities of negotiating and meeting the demands of a contract to undertake a 2-stage evaluative study collaboratively (with the organisation studied being Greater London Post Qualifying Consortium) in a transparent and ethical manner. The rationale had been financial and professional.

Linda Jones February 2014.

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Title of module	Title of assignment	Key Ideas influenced my development
Module 1. Foundations of professions (FOP).	The dilemmas, tensions and challenges of using Accreditation of Prior Experiential Learning (APEL) as an assessment tool in the delivery of Continuing Professional Development (CPD) within the post qualifying framework for Social Work.	Villages of APEL Warner-Weil and Mcgill (1989). Deep and surface approaches to learning (Marton & Saljo 1984). Conceptions of semi-professions, tensions between, vocational and professional status, professionalization and service user perceptions of quality (E.g. Eraut).
Module 2. Comparative education	The social invention of a profession; and a critical reflection of classroom challenge.	Conceptions of "helping" as undermining professional status of social work in the UK in comparison to communist conceptions. Experience of trialling an educational instrument and encountering the work of social economist Sen.
Module 3. Methods of Enquiry 1 (MOE1)	Learning from experience. - A qualitative study of communication and meaning-making between stakeholders in a portfolio assessment route to Post Qualifying awards in Social Work.	Revisiting Boud through the lens of HE rather than social work. *"This qualitative study uses discourse analysis to identify dilemmas and tensions between competing conceptions of experiential learning by constructivist position and interest in language and power which infuses the paper."* Page 2
Module 4. Methods of Enquiry 2 (MOE2)	A qualitative investigation of validity issues in the context of Assessment of Experiential Learning in the profession of social work.	Experience of tensions between doctoral study and paid evaluation, ethical dilemmas. Managing competing time lines Crooks et al – issues of validity
Institution focussed Study (IFS).	The Heart of Formative Assessment: practical ideas for encouraging sustainable assessment for learning in Work Based Learning and Continuing Professional Development.	Instrumental study, seeking to make a difference to Higher Education. Tensions between learning, gate keeping and quality assurance processes. Discovery that practitioners could identify and articulate key requirements for formative assessment found in theorised accounts but few authors articulated the relational element highlighted by pedagogues

Thesis	Managing to care, the emotional dimensions of formative assessment: sustainability of teacher learner relationships in four case studies	A deliberate attempt to articulate the concept of relationship highlighted in the IFS. Multiple-methods design Forced to improve editing skills to remain within word count.

APPENDIX B: REFLECTIVE ACTIVITY: EXTRACT FROM A MODULE HANDBOOK

Reflection is a key aspect of all units at the Post Graduate Medical School. It is explicitly integrated throughout this unit through the two discussion boards and your reflective blogs. As you become increasingly mindful of issues and encounters in day-to-day life you are encouraged to maintain a reflective record of what has meaning for you and how your new or revised understandings and insights are prompting your development as an educational leader. Critical reflection is a significant component of Part 2 of the assessment. In your mid-term report you are required to focus on the personal qualities you brought to and the learning acquired from the experience of contributing to a collective presentation task.

Academic reflection can be conceived of as a triangle of "I", "we" and "us". Where the "us" is the evidence based theories and policy environment. The "we" may be how through discussion and debate we revise our understandings and stance on issues.

"I": my own thoughts, feelings, current beliefs and ideas.

Reflection on experience

"Us": the community of practice's evidence base discourses and debates, thoughts and ideas – often found in policy documents, academic readings research

"We": other people's thoughts and ideas e.g. Comments from tutors and peers or classroom debates.
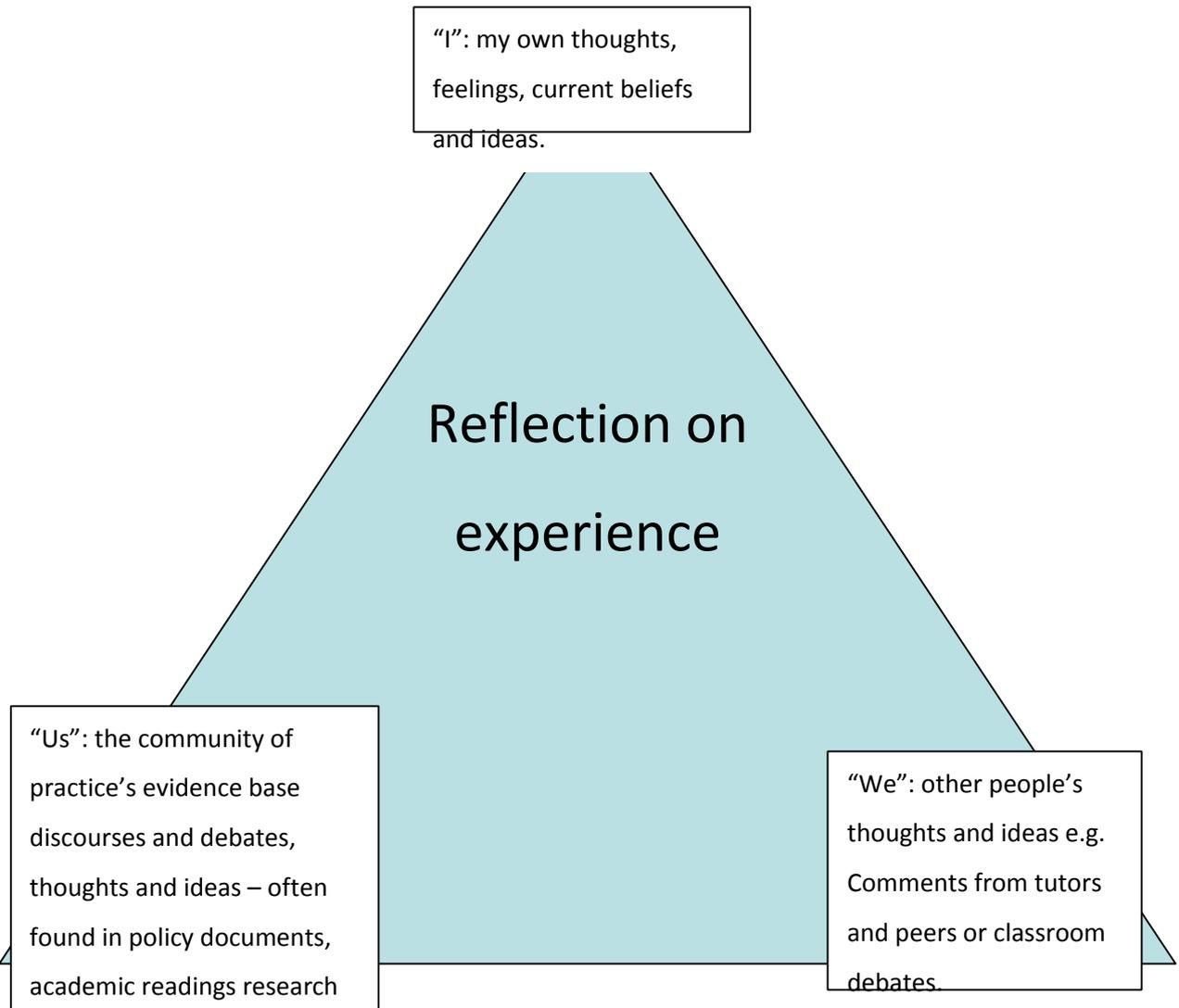
Reflection is a core component of most Higher and professional Curricula. To understand the importance of reflection in all aspects of professional development let's look at how it was taught at one of the best known educational institutions - Hogwarts. Maybe you remember the scene when Professor Dumbledore is introducing Harry Potter to the pensieve.

'Harry stared at the stone basin. The contents had returned to their original silvery white state, swirling and rippling beneath his gaze.
"What is it?" Harry asked shakily.
"This? It is called a pensieve", said Dumbledore.
"I sometimes find - and I am sure that you know the feeling - that I simply have too many thoughts and memories crammed into my mind."
"Er", said Harry, who couldn't truthfully say that he had ever felt anything of the sort.
"At these times", said Dumbledore, indicating the stone basin, "I use the pensieve. One simply siphons the excess thoughts from one's mind, pours them into the basin, and examines them

at one's leisure. It becomes easier to spot patterns and links, you understand, when they are in this form".

Until we get such powerful magic as the "pensieve" we need to rely on reflective models. With reference to the triangular reflection model above and Barnett's Masters level Grid below we will engage in activities designed to help you deepen the "I" in your reflection. You will work collaboratively and use peer based learning and assessment activities to explore the "we" and progress your theoretical and practical leadership capabilities by engaging with a range of relevant literature that will enable you to express "us" through your writing.

(Jones 2009)

'Assessment and feedback practices should be designed to enable students to become selfregulated learners, able to monitor and evaluate the quality and impact of their own work and that of others.' David Nicol (2010)

CHAPTER 1 INTRODUCING THE THESIS

BACKGROUND

This thesis emerged from the outcomes of previous doctoral research: "*The Heart of Formative Assessment: practical ideas for encouraging sustainable assessment for learning in Work Based Learning and Continuing Professional Development"* (Jones 2007). In that study, expert practitioners concurred that formative assessment was the pedagogical activity with the biggest impact on adult learning (Nicol 2006) although it is "*poorly understood by teachers and weak in practice"* (Black and Wiliam 1998:18). The emotional significance of pedagogical relationships and emotional dimensions of learning are relatively poorly understood (Illeris 2006; Meyer and Turner 2006; Crossland 2007) and research has predominantly focused on the negative impact of emotions (Pekrun et al., 2002:92) rarely considering potential benefits of curricula to optimize positive feelings about instruction (Moore and Kuol 2007).

Notable exceptions to this include the following: experiences of hope and pride, as intrinsic rewards associated with high achievement, motivation and retention (Pekrun et al. 2002:99); with self-actualization (Maslow et al 1970), work on the importance of feelings for reflection on and learning from experience (Boud and Walker 1985; Moon 1999) and recently for utilizing feedback in 360-degree appraisal systems widely used in medicine (Sargeant et al. 2009). Despite limited research, theorization and appreciation by Higher Education (HE) lecturers (Yorke 2003), "emotion work" has remained everpresent in adult learning and meaning-making processes (Clark and Dirkx, 2008:94). There is a need to enhance our understanding of the emotional and caring dimensions of teacher-learner relationships, especially within the context of giving and receiving feedback.

Feedback only becomes formative assessment if and when students use it to develop: *"Information on the gap when used to alter the gap (most probably to decrease the gap) becomes feedback. If information on the gap is merely stored, without being utilized to alter the gap, it is not feedback" (Ramaprasad 1983:45)*

Formative assessment only becomes sustainable when it "*meets the needs of the present without compromising the ability of students to meet their own future learning needs*" *(Boud 2000:151)* and when learners have a capacity to self-regulate. Self- regulation is "*an active constructive process whereby learners set goals for their learning and monitor, regulate and control their cognition, motivation and behaviour, guided and constrained by their goals and contextual features of the environment*" *(Nicol and Macfarlane-Dick 2006:202).*

Expert practitioners, sampled in Britain and Australia, believe that sustainable formative assessment requires educators with relational skills and caring dispositions, capacities rarely addressed in staff development programmes (Jones 2007). New thinking is needed to develop educational systems that address competing demands or doubleduties experienced by educators if they are to deliver sustainable formative assessment (Black and Wiliam 1998, Boud 2005).

Boud identified three "double-duties" or paradoxical demands facing educational systems - tensions between:

- *Assessment for summative and formative purposes:*
- *Immediate task and longer term goals; and*
- *Attending to the learning process and substantive content (Boud 2000:160).*

He maintained that Higher Educational Institutions (HEIs) "*must" (my italics)*" equip learners' to become lifelong, independent and autonomous learners by finding ways to enable students to become self-assessing (Boud 2000:159). I identified two additional subtle double-duties, less evident in the literature, and requiring individual formative assessors to balance the management-of-self (as learner, tutor, formative assessor) whilst facilitating learner self-management and policy requirements and Higher and Professional Education (HPE) infrastructures with emergent ideas of best practice from Communities of Practice (COPs) and the literature (Jones 2007).

These double binds are supercomplex "*multiple and competing networks of consideration, influence and even force" (Barnett 2000:25).* Supercomplexity is unlikely to be addressed by simple linear solutions and may require changes in orthodoxy (correct beliefs about the nature of something), orthognosis (correct manner of knowing) and orthopraxis (accepted as right by communities of practice). As practitioners experience double-duties at a personal level (Jones 2007), there are risks of lowered morale and motivation (Anderson 2004:10). For example the intrinsic rewards of creative problem solving may be dampened if they are perceived as generating potential

blame or loss of status within an organisation thus reducing innovation and development.

Post-feminist perspectives on best pedagogical practice frequently include managementof-self, suggesting that relational caring need not be in tension with the achievement of pedagogic or policy aims. Arguably the explicit development of a workforce with selfmanagement and relationship-building skills within educator development programmes could reduce some of the impact of troublesome double-duties.

Formative assessors who display caring dispositions might be regarded as "heroic[1]", but unable to sustain caring assessment behaviours over time. This "heroic" (beyond the call of duty) motif, signals another tension between theorist and practitioner conceptions. Is management of emotional dimensions core business in assessment for learning (AfL) or an over-extension of the Higher and Professional (H&P) educators' role? Alternative explanations for relational caring challenge the inevitability that use-of-self is unsustainable and risky in the context of Higher and Professional Education (H&PE). Alternative perceptions consider pedagogical caring as a valuable commodity to HEI systems rather than a risky individual trait or even weakness.

This thesis explores how management of emotional climates surrounding the giving and receiving of feedback might enhance sustainability of formative assessment and considers what changes would enable pedagogues to build and maintain effective reciprocal relationships and cope with the double-duties encountered in their role.

As lifelong learners, educators are themselves consumers of formative assessment from multiple sources. My previous study (Jones 2007) diagnosed a gap in current faculty development strategies with respect to recognition and management of emotions and pedagogic relationships in giving and receiving feedback. This study illuminated ideas and actions which might address that gap through curriculum interventions designed to enhance sustainable formative assessment, reduce the stress of double-duties and optimize the emotional experiences of teaching and learning in HEIs. It explored the potential of the explicit acknowledgement of emotional processes, experienced by trainee educators, as underused resources for reflection. Ideas from other professions which advocate self-awareness, use-of-self and promote appropriate forms of caring, as valuable pedagogic tools were identified. For instance,

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[1] An unpublished comment made by David Boud during a 1:1 meeting in Sydney with reference to my attempts to identify "expert formative assessors" who he feared, might invest more of themselves than might be reasonably expected.

> *"The use-of-self in social work practice is the combining of knowledge, values and skills gained in social work education with aspects of one's personal self, including personality traits, belief systems, life experiences and cultural heritage…It is the use-of-self that enables social workers to strive for authenticity and genuineness with the clients we serve, whilst, at the same time, honouring the values and ethics we so highly value in social work practice" (Walters 2014:1)*

FORMATIVE PEDAGOGY - THE PHENOMENON OF INTEREST

This thesis explores ways of providing possible support and guidance for educators facing the paradoxes inherent in HEIs by challenging dominant orthodoxies and suggesting revisions to professional development strategies. It examines practitioner claims that effective formative assessment requires capacities to create and manage the emotional space in which feedback is developed and delivered. It adopts the terminology of **formative pedagogy** as the phenomenon of interest. The term captures and delineates a specific focus on teacher-learner and relationship-based AfL. It includes evaluation of learning needs and feedback practices which balance both task-oriented *and* person-centred formative assessment. Formative pedagogy is defined as "*The deliberate use of pedagogical relationships that enable learners to identify ways to move forward in relation to their own understandings of their world, the learning context and the negotiated outcomes of particular learning episodes*" (Jones 2007).

In this way, affective and relational dimensions between givers and receivers of feedback become key elements in learners' decisions to utilise feedback. Formative pedagogy deliberately generates relational spaces which optimise chances of learners' deciding to utilise feedback to address identified gaps. Thus conversion of formative assessment to formative pedagogy involves the deliberate building of relational factors such as trust, respect and care. Recent research into how relational approaches reduce defiant student behaviours and enhance cooperation in classrooms found that trust (considered as student perceptions of legitimate authority, and fair application of power and beliefs) was positively related to students' respecting and following their teacher suggestions and to collective cooperation (Gregory and Repski 2008:345).

The current study explores formative pedagogy-in-action to identify whether and how positive relational spaces are developed, experienced and sustained in four different case studies. It clarifies which and how interpersonal and intellectual skills for relational

approaches are developed and sustained in different types of adult learning and which strategies might be useful for H&PE in general and medical education in particular. An assumption that educators need to understand, recognise and use their own emotional responses to learning episodes underpins formative pedagogy. The literature review chapters justify this position through reference to social work and school leadership, where the use-of-self is actively developed in practitioners.

Accepting the emergent concept of formative pedagogy challenges the current balance of formal and hidden curricula, also known as "*sets of influences that function at the level of organisational structure and culture" (Zhang et al. 2011:89*). It requires explicit articulation of, and developmental activity designed to address, the affective dimensions of teaching and learning, for example self-awareness, interpersonal and relational building skills. Although it is common for universities across Australasia, Britain and America to provide central support for faculty development the index of Kahn and Baume's (2004) influential text, "Enhancing Staff Education and Development" has no mention of affective elements. It focuses on policy and professionalization of staff development roles through evidence-based practices (Jones 2007). In the closing chapter of this thesis I pay attention to how the findings might be disseminated within my own practice, the medical education community and what kinds of precise contributions might be made to discourses relating to HEI workforce development.

Lifelong learning has become a key H&PE policy driver (Omma in Unesco 1996; Edwards and Ransom 2002: Dearing 1997), bringing attention to a previously hidden curriculum of life-skills and capabilities reframed as "graduate attributes". Graduate attributes of 'transferability, employability, enterprise and personal competences' have become requirements for students exiting HEIs. (http://www.re-skill.org.uk/index.html accessed 2012). This study suggests that the attributes of self-directedness and emotional competence might also be appropriate graduate attributes and proposes formative pedagogy as an appropriate strategy for their acquisition.

RESEARCH DESIGN

The conceptualised features of formative pedagogy include:

- a learning contract (shared expectations) between teacher and learner,
- the provision of feedback,
- experience of emotions related to learning processes, and

- the achievement of immediate and longer-term learning outcomes.

Some of these are difficult to measure or witness. To overcome this problem, a mixed-method, hermeneutic design has emerged to address three research questions:

1. What are teachers' and learners' perceptions of pedagogical relationships? How do they differ?

2. How do the emotional cultures of learning environments influence the effectiveness of these relationships?

3. How might the deliberate use of pedagogical relationships impact on the effectiveness of formative assessment?

The design employed empirical and interpretive approaches to analyse four case studies. The strategy for sampling cases was influenced by Newman's "*Teaching defiance - stories and strategies for activist educators*" (2006), which suggests that materials can be "filched" from elsewhere. As a researcher I was unashamedly influenced by my experiences of teaching social work, counselling skills and family therapy. In these contexts explicit use-of-self is recognised and some techniques and models have already been tested. In the closing chapters examples are included to illustrate how I have striven for praxis within my own practice as a faculty development specialist for medical education. Thus this study was constructed with a shameless desire to "filch" ideas and methods from a wide range of Adult Education for Human Development (AEHD) disciplines and discourses.

AEHD denotes all forms of adult education where there is delineation between teacher and learner and an "*invitation for participant learners to engage in processes generating choice for personal and social change*" (Willis 1994:75). The sample, like Willis's definition, encompassed informal, community and H&PE learning environments: GP (General Practitioner training); (Shaolin) Kungfu; 5Rhythms (dance) and undergraduate (medicine).

The aim was not evaluation of teacher effectiveness but an "appreciative inquiry" (AI) (see below) into what works, that is, an inquiry that asks questions to systematically discover positive potential and effectiveness.
(http://appreciativeinquiry.case.edu/intro/whatisai.cfm/ accessed 2010).

My decision to adopt an Appreciative Inquiry was consistent with phenomenological approaches that aim to identify "*whatness*" (Willis 1998a) and encourage participation in

studies by communicating an appreciative, empathetic reflective approach (Willis 1999) rather than an evaluative purpose.

A parallel mixed-qualitative and quantitative methodology of survey, observation and interview (consistently applied in this order) was employed to gather data on how formative pedagogy was experienced in four distinct areas of AEHD. Designed to generate numerical and narrative data that illuminated whether investment in formative pedagogy might aid delivery of sustainable assessment, this small scale phenomenological study was never intended to produce generalizable outcomes. The more modest aim was to make a contribution to discourses on how to address double-duties (Black and Wiliam 1998; Boud 2005).

THE STRUCTURE OF THE THESIS

Following this introductory chapter the thesis is presented in three parts.

Part 1: **Foundations** includes chapters 2 – 4, which outline the evidence-base of the thesis and defines concepts that will be drawn upon for analysis and discussion of findings. For instance formal and informal learning and conceptualisations of learning. Shifts from knowledge transfer, a transaction characterised by separation between learner and teacher, towards approaches which align to Mezirow's (2000) conceptualisation of transformational teaching are identified. This is followed by a critical review of literature supporting the potential for performance improvement through the recognition of emotional dimensions of teaching and learning in professional development opportunities and curricula provided within H&PE. The literature presented was identified through an iterative literature search, which combined a disciplined and emergent review strategy.

Chapter three summarises literature which justifies claims in the emergent argument, (for example Crossland 2007 on expert teachers) and considers theories of learning, education and professional development from the wider field of AEHD. Chapter four outlines the methodological rationale. Attention is paid to the overall case-study approach, the choice of multiple data gathering, and data analysis methods.

Part 2: **Case Studies** presents the four case studies of formative pedagogy-in-action, each resulting in broad descriptors (related to research questions one and two) inferred from the findings. Chapter five, Case study A: **GP** (training) "The heart of the

community" outlines teacher-learner relationships in one component of this specialist postgraduate medical context. Chapter six, Case study B: (Shaolin Academy) **Kungfu** "Teaching from the confident heart", illuminates the unique cultural context of this traditional Chinese martial art. Case study C: **5Rhythms**: "The pride of the moving heart[2]" describes a less familiar, personal-growth-through-movement context while Chapter eight, Case study D: "The breathing heart and the art of lecturing" follows a familiar setting of **undergraduate medicine**.

Part 3: Discussion, conclusions and applications presents a comparative analysis of relational care across and between the four distinct traditions. Chapter 9 articulates similarities and differences in formative pedagogy across the four cases, while Chapter 10 summarises emerging principles and potential applications (relevant to research question three). This thesis concludes with final reflections that exemplify the instrumental contribution of this study as worthwhile for myself, as a practitioner, is worthy of wider dissemination into a number of communities of practice including faculty development for medical education in particular, and professional development in general.

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[2] This title refers to a quote by the 5Rhythms teacher "I doff my cap to everyone. I want to make it safe. People are courageous and tender. I feel like a lioness." (I/C)

PART ONE:
THEORETICAL
FOUNDATIONS

The two literature review chapters organise and outline key theories, ideas and evidence related to the research questions. Systematic coverage of the field of formative assessment is notoriously difficult (Wiliam 2009:7) and was not the aim of this review, which sought instead resources revealing the significance of emotions for AfL as support and justification for the concept of "formative pedagogy". The strategy was emergent and iterative, designed to provide unique combinations of associations and perspective shifts to develop new gestalts, and imaginative, alternative, holistic (rather than technical) views (Hart 1998:24-29).

The search began by defining initial search terms (adult learning + emotions or feelings) using BEI, ERIC and AEI search engines. This confirmed that emotional dimensions were under-problematised and under-researched (Crossland 2007, Goetz et al. 2006; Turnbull 2004) but revealed relevant concepts used iteratively to identify:

- Inclusion/exclusion terms for further searches, for example "affective" rather than emotional, (for example Beard et al. 2007).

- Liminal/ threshold language and concepts (Meyer and Land 2005), with the potential to bridge meanings across cases or professions, for example gendered concepts of caring.

- Innovative, qualitative methodological ideas, (for example Hiles 2002; Hones 1997, Chase 2000 and Willis 1999) evident in much of the relevant literature and deemed appropriate for researching a phenomenon of interest "*not directly observable*" and therefore "*a matter of theorisation rather than direct perception*" (Edwards and Usher 1996).

CHAPTER TWO: CONTESTED ACCOUNTS OF EMOTION AND RELATIONSHIP IN SUSTAINABLE FORMATIVE ASSESSMENT

THE THORNY ISSUE OF CONCEPTUALISING LEARNING, FORMAL, INFORMAL AND NON-FORMAL

Learning is a complex and widely contested concept understood, applied and valued differently within the wide literature on professionalization processes and professional development. Gibbons et al (1994:1) differentiated between paradigms of knowledge production such that mode one "generated within disciplinary, primarily cognitive contexts" often Universities, and mode two knowledge "created in the broader transdisciplinary social and economic contexts" such as workplaces or community settings. Sfard (1998) suggested two metaphors to illuminate different conceptions of learning as acquisition of knowledge or participation in learning. She warned against choosing just one. Such distinctions between which types of knowledge and learning should be most highly prized remains at the heart of many educational discourses but

the traditional beliefs in the dominance of acquisition of mode one knowledge has become increasingly problematic;

> "*researchers questioned the utility (generalizability) of much formally acquired knowledge. The 'transfer' of learning was problematic rather than simple. As Lave (1996, p151) argued, 'Learning transfer is an extraordinarily narrow and barren account of how knowledgeable persons make their way among multiply interrelated settings*." ([http://www.infed.org/archives/e-texts/colley_informal_learning.htm accessed June 2014](http://www.infed.org/archives/e-texts/colley_informal_learning.htm)).

Traditional epistemological foundations, that emphasised the primacy of theoretical over practical learning are giving way to alternative visions and are no longer the dominant paradigm (Heath 2003:108). Traditional conceptions of teaching and learning have drawn upon models of knowledge transfer sometimes referred to as the transactional or the standard paradigm. This standard paradigm emphasises the dominance of formal learning and is characterised by notions that: learning takes place in minds not bodies; is propositional (scientific, factual), expressed verbally and can be captured in writing (Becket and Hager 2002:98).

Now arguably even in professions such as medicine this is shifting. Mezirow's conception of transformative learning is cited within, for instance, Understanding Medical Education (Edited Swanwick 2010), produced by ASME (Association for the study of Medical Education) where we find the following definition.

> "*Transformative learning theory defines learning as a social process of constructing and internalising a new or revised interpretation of the meaning of one's experience as a guide to action…..helping adults to elaborate, create and transform their meaning schemes (beliefs, feelings, interpretations and decisions).. Transformative learning can be contrasted with conventional learning that simply elaborates the learners existing paradigm, system, thinking or feeling in relation to a topic...*
>
> *…Empowerment of learners is both a goal and a condition for transformative learning (Kaufman and Mann 2010:24)*"

This recognition of the importance of reflection, learner self-direction and learning from experience is having significant implications for the education of doctors including a shift in the power structure between teachers and learners. It involves the transfer of learning from mode one towards mode two - experiential and practical learning and "more perceptually oriented environments" where "teachers act as facilitators, emphasising process rather than solution" (ibid page 25).

Whilst not the focus of this thesis it is essential to clarify how conceptions and meanings, of types of learning, have been understood and employed in the analysis and interpretation of findings. This is not an easy task. Colley et, al. acknowledged the difficulties of establishing "a clear distinction between formal and informal learning as there is often a crossover between the two" (http://www.infed.org/archives/ehttp://www.infed.org/archives/e-texts/colley_informal_learning.htm accessed June 2014texts/colley_informal_learning.htm accessed June 2014. They advocated instead acknowledgement of twenty overlapping factors which can be clustered into four dimensions of informality and formality within given contexts. These are processes including pedagogic styles and practices and relationships, learner activities, approaches to assessment; secondly, settings (location), then set curriculum and finally the time scales for delivery. They also considered who decides what constitutes the primary and secondary purposes and contents asking. "*Is this the acquisition of established expert knowledge / understanding/ practices, or the development of something new? Is the focus on propositional knowledge or situated practice? Is the focus on high status knowledge or not?*" (ibid)

Colley et al. cite Eraut's (2000:12) approach to defining informal and non formal learning as "*what they are not, that is formal learning*" in order to exemplify the lack of boundaried definitions within the literature. According to Eraut formal learning has five characteristics including prescribed frameworks, learning events or packages designated teachers, credits or qualifications and externally specified outcomes. Whilst Schwier and Seaton (2013: 15) explained that formal environments typically require learners to engage each other (online) in specific, externally defined ways, whereas non-formal environments imposed fewer controls on learner activities, and informal environments imposed even fewer still.

Table 1:1 provides a map of Marton and Saljo (1997) conceptions of learning with Broudy (1980 in Eraut 1985); Entwistle and Ramsden (1983) principles of knowledge use and approaches to learning to Gibbon et al (1984) modes of knowledge production. It summarises the underlying assumptions and alignment of ideas about learning, which have most influenced this thesis.

TABLE 1:1 SUMMARY OF APPROACHES AND PURPOSES OF LEARNING AND ASSESSMENT

Conceptions of learning (Marton and Saljo 1997)	Principles of knowledge use (Broudy 1980) and approaches to learning (Entwistle and Ramsden 1983)	(Gibbons et al 1984) Mode One Mode Two knowledge production
Quantitative increase in knowledge Memorising The acquisition, for subsequent utilisation, of facts, methods etc	Replication, application (surface approaches to learning). Strategic learning -	Mode one, often associated with standard paradigm of learning and teaching
The abstraction of meaning An interpretive process aimed at understanding reality Developing as a person	Association and interpretation (deep approaches to learning)	Mode two, often associated with transformative learning and approaches to teaching

Throughout the study fitness of purpose, teacher learner relationships and curriculum models are considered in relation to optimisation of the production of both modes one and two knowledge, as appropriate for professional and faculty development purposes. The main focus remains the role of feedback as a mechanism for learning within higher and professional education and Heron's conceptualisation of pedagogy as intentionally enabling the whole person to learn is applied.

> "Learning takes place through an active aware involvement of the whole person – as a spiritually, energetically, physically endowed being encompassing feeling and emotion, intuiting and imagining, reflection and discrimination, intention and action" (Heron 1992)

PEDAGOGIC RELATIONSHIPS FOR ADULTS

"Mechanisms for learning in children and adults are similar, with differences lying, not so much in how they learn as in the state of being an adult (Squires 1995:93). Few of the 250 articles, in Black and Wiliam's 1998 seminal review of formative assessment related to non-school contexts yet it is widely cited as applicable across the lifespan (for

example Nicol and Macfarlane-Dick 2006). It is assumed that professional development of university teachers can draw legitimately on innovations in teacher development (ibid), the locus of most research and implementation of formative assessment models.

The role of caring in pedagogy is contested. Narrowly-drawn traditional technicistrational accounts, in keeping with accountability, efficiency and effectiveness agendas are less likely to be concerned with practices shaped by emotional drivers (Foley 1995:45). Foley believed effective teacher-student relationships required "*real teachers*" who could think and act strategically with commitment and with *passion. (1995:37).* Caring, though largely a-theoretical, commitment, intimacy and passion were considered as the cornerstone of good teaching by some (Goldstein and Lake 2003). Rogers' humanist counselling theories have been adapted as requirements for conscious and deliberate use-of-self and relationships in education: *"facilitation of significant learning rests upon certain attitudinal qualities that exist in the relationship between facilitator and learner" (Kirschenbaum and Henderson in Rogers 1990:262)*

Noddings' (1984) conceptions went further by introducing the principles of 3Rs, reciprocity, relatedness and responsiveness, in the belief that *"carer and cared-for contribute appropriately"* in any pedagogic relationship (Isenbarger and Zembylas 2006:123).

UNDER-VALUED INTERRELATIONSHIPS BETWEEN COGNITIVE AND EMOTIONAL DIMENSIONS OF PEDAGOGY

> *"Learning itself is an intrinsically emotional business" (Mortibouys 1999:15)*

The initial literature search identified predominantly rational accounts of teacher and faculty development and limited exploration of the emotional landscape of academic development (Goetz et al. 2006; Meyer and Turner 2006). Cultural shaping of interrelationships between emotion and cognition, within HEIs, was influenced by Descartes' assertion that passions and prejudice adversely impact on any search for truth (Crossman 2007; Lamm 2004). Such cognitive-rational perspectives have created relative ignorance of the role of emotions in learning, although, increasingly, commentators recognise that cognitions and emotions intertwine (Fineman in Turnbull 2000:4).

Influential authors Illeris (2002), Marsick and Watkins (1990) and Wenger (in Turnbull 2000:4l), retrospectively acknowledged that their contributions had under-recognition of emotional dimensions. By 2006, Marsick had developed a model of informal and incidental learning, built on Heron's (1996) up-hierarchy (see figure 2:1), which identified four mentoring relationship types from 1 (most) to 4 (least) effective and trusting:

1. Synergistic (overlapping team and learner development);
2. Potentiated (focussed on mentee development);
3. Additive (sum of effectiveness of both), and
4. Antagonistic.

Vygotsky, too, recognised "*affect and intellect are not two mutually exclusive poles but two mental functions, closely connected with each other and inseparable".* His influential Zone of Proximal Development (ZPD) encompassed both affective and intellectual features, proposing that teachers need to convey care, not merely information (in Levykh 2008; 87-92).

Close connections between the brain, emotions, reasoning/decision-making and consciousness are increasingly acknowledged by neuro-linguists (Damasio 1999; Lamm 2004:2; Sylwester 1994), who echo calls for greater integration of emotions into learning research and support. Consciousness, is neither purely rational nor cognitive but, emotional experiences do impact and influence the limbic system and brain function (Greenfield 2001:21). Emotions, more powerful determinants of classroom behaviours than logical-rational processes, should not be ignored because "s*tudents can learn how and when to use rational processes to override emotions or when to hold them in check*" (Sylwester 1994:65). Yet McNaughton (2013:71) described discourses of emotion in medical education "*as the ever present absence*" whilst for school leadership education, through a Human Resource Development lens, Turnbull (2000:13) concluded "*knowing and knowledge management is considered vital for our understanding of current and future forms of organisation… an understanding of situated learning is incomplete without attention to the element of emotions".*

RELATIONAL CARE IN HIGHER AND PROFESSIONAL EDUCATION

> '*The single quality… alumni most frequently associated with effective teachers – more often than brilliance and love of subject and even more often than enthusiasm*

in the classroom – was a special attitude toward and relationship with students' (Mortibouys 1996:14).

Research into excellence in tertiary teaching often highlighted caring, the best student evaluations being awarded to teachers perceived to care and found to reflect (Kane et al., 2004) whilst recollected accounts of excellence showed emotions having a preeminent role (Massoni 2004; Moore and Kuol 2007:7).

Perceptions of "good teaching" (rewarded by promotion, grants etc.) differ and its relationship to effectiveness is unclear (Carpenter and Tait 2001:191). Despite growing evidence that *"matters of the heart"* needed to be addressed in academic development programmes *(Moore and Kuol 2007:89),* HEIs remained ill-prepared to support teachers who respond to these calls (Walker et al. 2006:361).

Crossman's (2004:318) investigation of relationship and emotion in perceptions of assessment found that *"students value opportunities to express their beliefs, feelings and emotions during the assessment process ...and... expect teachers to* **balance** *objectivity in assessment with empathy for those parts of themselves shared in the process".*

The significance of emotions, feelings and mood for relational learning

Crawford and James (2006:3) criticised the objectivisation of emotion and failure to recognise the powerful role subconscious processes play in learning theories. Their studies drew on Fineman's (2003) social constructivist definitions: *"all organising actions influence and are influenced by feelings (what we experience) emotions (feelings that are shown) and moods (feelings that persist)...actions and affects are inseparable and affects are integral to actions."*

Emotions (feelings that are expressed)

The language and grammar; theories; assumptions and research focus of emotions (mostly on their negative impact on learning) seem ill-defined (ibid). Yet Meyer and Turner (2006:377) maintained integration of cognition and emotion -*short intense episodes or states*- to be important for motivation and classroom learning. Emotion required expression, identification and understanding and markers of positive emotions

like laughter support instructional interactions (ibid). Emotions, whether conceptualised and embodied as psychological states or as value judgements of events and experiences could be motivational factors (Antonacopoulou and Gabriel 2001:437)-intrinsic rewards that can contribute towards self-actualisation (Maslow (1970).

In Heron's (1992) "up-hierarchy", affective knowledge underpinned and supported three other modes of knowing: imaginal, conceptual and practical. His influential model proposed that emotions fulfil or frustrate our getting individual being needs met and are key to empathetic behaviours, identities and personhood (see figure 2:1).

FIGURE 2.1 HERON'S 1992:20) UP HIERARCHY
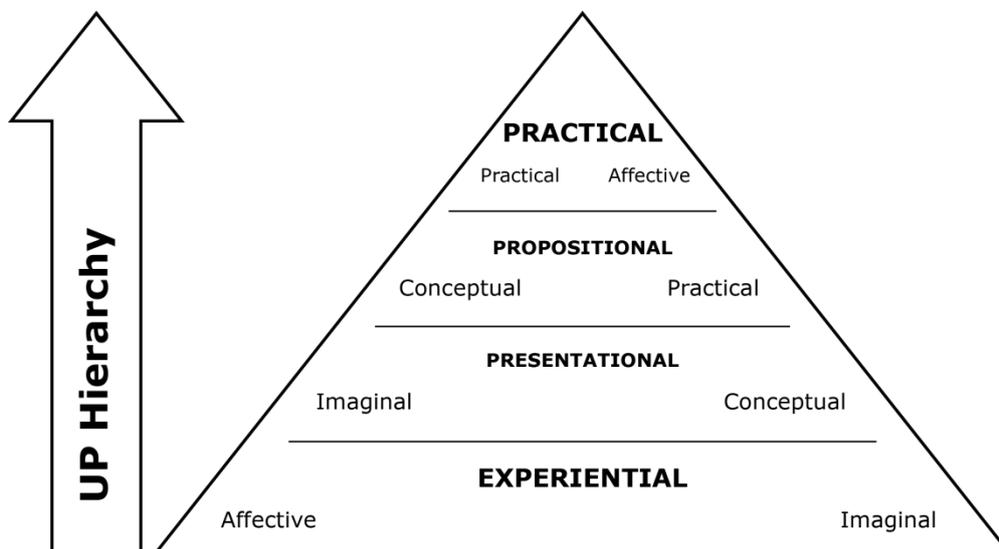
Affective knowing embraced feelings and emotions where "*emotion is an index of motivational states*" (Heron 1992:16) while whole-person pedagogies proactively addressed feelings and relationships so that learners could be "*in communion with what we find outside ourselves*" (Heron 1999:45).

Tran and Ward (2006:1) differentiated between deep and surface[3] approaches towards emotional engagement with learning. They sub-divided commentators into two sets. Firstly, those with psychoanalytic orientations who conceptualised emotions as intrapersonal phenomena in conflict with rationality, secondly, social-constructionists, who argued that emotions are socially-created and enable individuals to evaluate and respond to external contexts (in Turnbull 2004:1088). Social constructivists challenged beliefs that the involuntary nature of emotions inevitably created vulnerable teachers and learners unable to control their responses to events.

Plutchik identified eight core emotions, each with subtler shades (see figure 2:2) and suggested that: *"The effect of the emotional state is to create an interaction between the individual and the event or stimulus that precipitated the emotion. The interaction usually takes the form of an attempt to reduce the disequilibrium and re-establish a state of comparative rest"* (2001 online unnumbered).

Emotional responses might have a negative or positive impact on the assimilation of feedback and learner self-efficacy. For example, student perceptions of unjust assessment procedures significantly decreased motivation and generated unfavourable attitudes to courses and aggressive feelings towards lecturers giving feedback (Nesbit and Burton 2006:656).

Feelings (what we experience) included the domains of "*empathy, indwelling, participation, presence, resonance*" (Heron 1992:16.). Numerous authors offered lists that exemplified feelings (for example Isenbarger and Zembylas 2006; Crossman 2007 and Pekrun 2011). Figure 2:2 below summarises a typology of feelings developed from studies exploring authenticity and the display of feelings by teachers (Erickson and Ritter 2001:155). Zac (2011 accessed August 2012) argued that when we trust or feel trusted we experience highly pleasurable releases of oxytocin, which reinforces our positive sense-of-self.

Feelings, experienced consciously or subconsciously, are difficult to measure, often communicated through metaphor and may move us to action (Crawford and James 2006:7). Erickson and Ritter differentiated positive, agitated and negative (see figure 2:3) distinctions which, if applied to instructional interactions, may impact on learner decision-making regarding take up of feedback.

FIGURE 2:2 PLUTCHIK'S TYPOLOGY OF EMOTIONS

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[3] Marton and Saljo (1997) identified significant differences in student approaches to learning as surface approaches (increase in knowledge, memorising and acquisition of facts) and deep (abstraction of meaning, interpretation for understanding reality and development as a person).
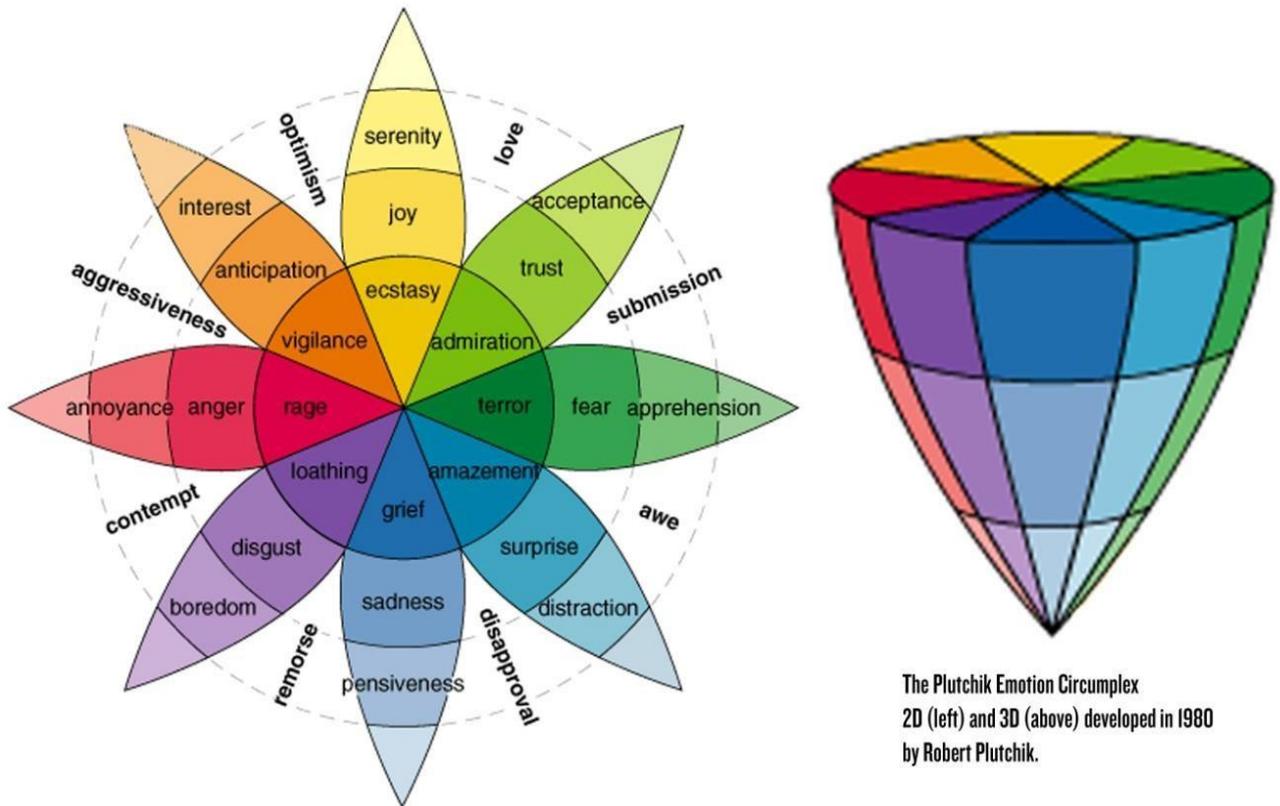
The Plutchik Emotion Circumplex
2D (left) and 3D (above) developed in 1980
by Robert Plutchik.

FIGURE 2.3: ERICKSON AND RITTER (2001) TYPOLOGY OF FEELINGS

Positive	Agitated	Negative
Happy	Irritated	Helpless
Calm	Angry	Sad
Proud	Nervous	Guilty
Excited		Scared
		Ashamed

Feelings have been considered key to reflection and learning from experience (Boud & Walker 1993; Moon (2001); Willis 1999; Mann 2008). Assimilation of "*feeling rules*", the extent to which emotions should be controlled, and "*display rules*", the norms governing acceptable levels of expression and tolerance of emotions (Beatty and Brew 2004:332), are necessary prerequisites for joining communities of practice (Turnbull 2000). Mann (2004:208) identified dilemmas and risks associated with "internalised feeling rules" for professionals wanting to display emotions such as sympathy rather than comply with expectations of neutral affect.

MOODS (FEELINGS THAT PERSIST) AND EMOTIONAL DIMENSIONS OF LEARNING ENVIRONMENTS

Mood or low intensity emotions, influenced cognitive process and could enhance or detract from task performance and mechanisms of recall (Pekrun, 2006:101; Levine and Burgess, 1997; Meinhardt and Pekrun, 2003:12).

Moods were "*closely entwined with self-regulated learning*" and reciprocal exchanges of emotions (for example where teacher enthusiasm influences and is fuelled by student engagement in learning) shape "academic emotions" linked to learning, classroom instruction, and achievement (Pekrun 2002:96). Emotions could be experienced along three continua pleasantness/ unpleasantness; calm/excitement, and relaxation/ tension (Beard et al. 2007:238). Interactions between energy/tension and calm/tiredness generated mood which impacted on learning and memory retrieval (ibid p238).

Kavenagh and Keithly (in ibid) postulated a causal relationship between mood, learning environment and caring from teachers. Being with teachers that student-teachers wish to emulate (like, respect, admire and trust) influenced mood and engagement (Meek in ibid). Engagement, essential for learning to occur, created emotional arousal (Beveridge and Milner 2006:19) but too much arousal caused anxiety, which impeded learning, whilst too little generated boredom (ibid. Boredom leads to superficial shallow ways of processing information (Pekrun 2006: 326). Research into the reasons underpinning 139 alumni nominating teachers for excellence awards serendipitously highlighted that many of them mentioned emotions and 44% specified the learning was "*of interest*" (Moore and Kuol, 2007:89). Learning required a balance of enjoyment and interest. Interest or curiosity are emotions related to engagement, whilst enjoyment contributed to learner persistence (ibid p91).

EMOTIONAL INTELLIGENCE AND PERSONAL QUALITIES

Emotional Intelligence (EI), *the ability to monitor one's own and others' feelings and emotions, and use the information to guide one's thinking and actions*', was claimed to be the most significant element in learner success (Salovey and Mayer 2008:504).

The Four elements of EI are

> **Perceiving Emotions:** in oneself and others as well as in objects, art, stories, music, and other stimuli.

> **Facilitating Thought**: Generating, using, and feeling emotion, as necessary, to communicate or employ feelings in other cognitive processes

> **Understanding Emotions:** Recognising how emotions and emotional information combine and progress through relationship transitions, and appreciating such emotional meanings

> **Managing Emotions**: Being open to feelings, and modulating them in oneself and others so as to promote personal understanding and growth" (Mayer-Salovey-Caruso in Lewis et al. 2005:340).

EI has often been mis-reported as an individual trait rather than conceptualised as intended as a set of interrelated abilities (Mayer et al., 2008) which can be developed and used *for predicting socially relevant outcomes"* (Ibid). EI is defined throughout this paper as "*limited to the abilities at the intersection between emotions and intelligence – specifically …the set of abilities in reasoning about emotions and using emotions to enhance reasoning* (ibid 2008:514).

Mayer et al. (2008:525) summarised reported trends in EI outcome studies as highlighting better social relationships and well-being. As a teachable sets of abilities EI has been influential in the design curricula for developing leadership within the NHS, especially as a demonstrable set of *personal qualities at the heart of the NHS leadership Framework* (Swanwick and McKimm 2011:12 McNaughton 2013*) See figure 2:4.* Whilst personal qualities here became part of informal curricula for medical students, Zhang et al. (2011 online unnumbered) suggested that students, overwhelmed by the formally-assessed curriculum were unlikely to prioritise emotionally-based competences.

Critics cited poor predictive ability between existing EI measurement tools and performance. For example, much research and measurement relies on accurate selfassessment, which was sometimes difficult for medical students (Rees 2003 in Lewis et al. 2005). Some critics feared EI becoming a sufficient rather than an incomplete set of competences that is, not necessarily capturing morality (Saarni 2000 in Lewis et al., Heron 1992; MaCulloch 2001 in Lewis et al). Despite EI being "*unstable psychometrically*" and there being difficulties assessing associated competences, it can help develop professionalism, especially if reframed as "*sensitive and intelligent*

problem-solving activities emerging from deliberate, structured group learning" (Lewis et al. 2005:341). Emotional intelligence was needed to articulate and organise themes, and to manage or cope with people, complex situations and paradoxes of organisational life for example Stacey (2010:410).

FIGURE 2:4 PERSONAL QUALITIES IN MEDICAL LEADERSHIP COMPETENCY FRAMEWORK (SWANWICK AND MCKIMM2011:12)

Pekrun searched for instruments to measure emotions and developed a control-value theory - an integrative framework for understanding complex, emotional interrelationships between engagement, self-regulation and academic achievement (2006;316). For example, anxiety comprised of "*uneasy and tense feelings (affective), worries (cognitive), impulses to escape from the situation (motivational)*" (Pekrun et al. 2011:37). This theory helped define and articulate the antecedents and effects of emotions on learning environments. His social-cognitive model (See appendix 2:1) suggested that emotion, cognition and motivation were platonic and integrated. He maintained learner perceptions of control (as causal attributions to sense-of-self), value (as interesting, relevant to goals etc) actions and outcomes have significant impact on learning (Pekrun 2006:17). Environmental factors which significantly influenced subjective control and value included:

- Teacher competence and support
- Level of autonomy afforded learners
- Goal-expectation (for example career outcomes) - Feedback, educational or career consequences and - Social relatedness.
  (Goetz and Pekrun et al. 2006)

Pekrun differentiated between more familiar achievement and process outcomes. Process emotions were sub-divided into prospective (for example hope / hopelessness) and retrospective (for example pride and shame) outcome emotions: "*…physiologically activating emotions can be differentiated from deactivating emotions, such as activating hope versus deactivating hopelessness" (Pekrun et al. 2011:37).*

Typically emotional regulation, by effective educators, strove to create relational environments that influenced engagement (perceived value) and empowerment (sense of control) both significant for AfL (see appendix 2:1). Emotional learning processes might be likened to being in "flow" (Csikszentmihalyi 2000:323), where the activity fostered engagement and creative problem solving. Experiences of interest and enjoyment were assumed to increase self-regulation through cognitive flexibility, use of meta-cognitive, meta-motivational and meta-emotional strategies for adapting to tasks and goals. Negative emotions relied on external guidance. Pekrun's individual and social determinants of achievement emotions echoed practitioner accounts of effective

formative assessment. For example, enhancement of the deliberate use of relational strategies to reduce anxiety or boredom, two emotions which can lead towards rigid, surface learning strategies such as rehearsal for recall (Jones 2007:12).

EMOTIONAL CLIMATES, EMOTIONAL LABOUR AND RELATIONAL CARING

Hochschild's work discusses how a workers' sense-of-self was influenced by feeling-rules that suppressed emotional expression in the workplace (1975). She concluded that the middle classes were better prepared for such social ordering of emotive experiences i.e. keeping feelings deemed contradictory to professional roles in abeyance.

From her Marxist perspective the exchange-rate for care-giving between self, organisational structure and employer favoured employers and recipients of care at the expense of employees. She differentiates emotional work, which might take place in private, from emotional labour: "*the management of feeling to create a publicly observable facial and emotional display" (1983:7).*

The generalizability of Hochschild's emotional labour theory, from service industries to the professions has been challenged but others argue that teachers undertook knowledge work as "*service workers engaged in nurturing"* and needed to have the capacity to undertake emotional labour (Isenbarger and Zembylas 2006:132). Mann's (2004) research concluded that for guidance and counselling professionals in particular and "people work" in general, the capacity to perform emotional labour was a vital skill and a potential source of stress. Stress was differentiated into distress (harmful, disease causing and linked with burnout) and eustress (energy giving and rewarding stress).

Erickson and Ritter (2001) explored risks of teacher burnout associated with experiences of positive, agitated and negative emotions. Positive emotional experiences, climates and authentic self-expression correlated least with burnout. Negative emotions constrained by display rules, experiences and management of agitation, significantly increased the risk of burnout. They reported that in-authenticity increased depressed mood and was most damaging (ibid p159) but capacity to perform emotional labour was a skill necessary for "people work". Furthermore, learning to comply with appropriate display rules for example, suppressing authentic, but inappropriate emotions from "*leaking",* might be important to professional roles, such as new nurses hiding tears in order to care for a dying child *(*Mann 2004:207). However, *w*hen true feelings and display rules were mismatched, workers experience "*emotional dissonance" (*ibid 2004:208*).* Thus, recognition that the potential positives of optimising authentic

communication might reduce the need for emotional labour, whilst improving performance of emotional labour, when necessary, could contribute significantly to sustainable relational caring.

In school settings, ideal teachers demonstrated a "*duty of care*" and expressed caring in appropriate ways "*fundamental to the teacher self*" (Barber 2002:383). Arguably such a capacity for caring may require a different type of habitus, interplay between individual will and organisational structures to generate dispositions, shapes. practises and perceptions (Bourdieu 1984:170). An alternative form of habitus, sometimes colloquially described as a feel for the game and could draw upon and be aligned to Bruner's ideas of teaching as a caring profession (Barber 2002:386). Many educators experienced pleasure and satisfaction from taking an interest (ibid p391) but encountered doubleduties between HEI policy requirements/ infrastructures and emergent concepts of best practice (Jones 2007:44).

Non – heroic conceptions of formative pedagogy

Fenwick called for a return to "*passion*" for learning rather than the "*deficit discourse*" that had driven lifelong learning policies (2006:10). She argued that caring relationships needed to be at the heart of pedagogic encounters shifting perception, within HEIs, from caring teachers being "*at risk*" to them having the "*audacity to hope*". Caring teachers need not be idealised as heroic or charismatic gurus. If the "*bounded location of pedagogy*" (ibid p12) changed, away from the individual teacher toward the institutional structures, cultural practices and the moral purposes that configure the complex relationships into which pedagogy was woven, there would be a risk of "*evacuating the human relationship at the heart of pedagogy*" (ibid p13).

New teachers' interpretations of their vocation often included social justice, cultural and empathetic responsiveness tinged with paradoxical awareness of perceived burdens of the caring role. (Walker et al. 2006). Caring behaviours in HEIs were marginalised despite indications that balanced caring enhanced retention and performance (ibid p359). A systematic review of student experiences in HEIs identified underacknowledged, mis-theorised accounts of emotions (Beard et al. 2007:235) and called for re-engagement with attitudes such as Rogers' (1969) realness, genuineness and empathy. Beard at al., (2007:239) concluded that explicit understanding of inherent rewards of appropriate authentic relationships could motivate and sustain both

learners and teachers. Like Mortibouys (2005), they advocated the development of an emotionally intelligent workforce.

Alternative stances on emotionality within instructional interactions acknowledge expression, identification, and re-conceptualization of relational caring as pivotal to enhancement of teacher motivation and relationships (Mayer and Turner, 2006:377-79). For instance emotional markers, such as laughter, could signify positive emotional climates conducive for the appraisal of situations (ibid) but may require a workforce with capacities to generate such climates and manage positive affect. Developing educator capacities to build and sustain authentic relationships might in turn have reduced the need for emotional labour and the in-authenticity evident in environments characterised by non-display rules.

Emotions were prevalent in learner accounts of risk-taking behaviours and pedagogic relationships influence student willingness to take risks (Meyer and Turner 2006:380). Bored, non-engaged learners felt limited pride in accomplishments and experience emotional states that reduced motivation to learn. This was because emotion and agency worked interactively with motivation such that teachers' own emotions appeared integral to the quality of their teaching (ibid p388).

Sustaining affective pedagogical behaviours within contexts characterised by doubleduties may require staff development programmes to provide educators with relational caring strategies and capacities to manage emotional labour. Enabling educators to value their capacity to perform emotional labour, as an expressive behaviour, may increase their sense of self-actualization and provide intrinsic rewards that enhance motivation.

Such strategies might address expert practitioners concerns that:

> ". . . traditional academics can't hack the pink and fluffy ……. the emotional element of learning and the consequences of forming and ending relationships. A range of emotions from frustration, loss, pleasure and satisfaction when students complete and move on ... Developing empathy and care for the well-being of learners was mentioned by a majority of the sample. Yet only four reported strategies to handle the personal consequences of caring or self-care" (Jones 2007:34).

Expert teachers, who arguably practised formative pedagogy, deliberately utilised authentic emotional responses and explicitly seek strategies for managing the impact of double-duties and supercomplexities on their professional role, identity and motivation for example lack of formal recognition for effort (ibid).

Kantian concepts of social justice resulted in professional expectations of affect-neutral relationships requiring educators to adopt "*a stand point of disinterested and disengaged moral actors beyond the world of emotions and feelings and not shaped by local customs or habits*" (Smeyers 1999:245).

Noddings influenced a sub-genre of gendered conceptualisation of pedagogy where caring, defined as "*a desire for the well-being of others*" needed to be relational. It was deemed "*a connection or encounter between two human beings, a carer and a recipient of care" (*Noddings 1992 in Shacklock 2008:182) and the foundation of effective pedagogy (Noddings online accessed March 2010). Noddings has significantly influenced a range of writers who argue in favour of emotionally informed rather than rational conceptions of teacher effectiveness. Effective teachers were care-givers who signaled "engrossment", empathetically perceived what learners felt or needed to express (Noddings, 1984; 1995:366) and through reciprocity developed sustainable caring dispositions in students. Such attention and monitoring was not unconditional but required an affirmative response from the cared-for (English 2003:300). Noddings' ethics-of-care promoted learning contracts underpinned by 3R's of reciprocity, relatedness and responsiveness (Sumsion 2000:168) where the cared-for had shared responsibility.

Post-feminist perceptions and shaping of caring pedagogies emerged throughout the literature search. For instance, Barber (2002) and Illeris (2002:237) acknowledged that under-recognition of emotional conditions might be due to male preference for abstract and structural approaches. Critical feminists, for example Guthro *(*2002:3*),* maintained that the dominant masculine orientations of HEIs have resulted in non-recognition of and silencing women from speaking of "*the incredible amount of labour, time and commitment in activities such as mother-work, then this labour becomes invisible within the academy*".

Gendered perception of teaching quality, by medical students, showed role-model status ascribed to 27/46 (male doctors based on knowledge, professional power and authority) compared to 19/46 female medics valued for "*human attributes: tolerance, integrity, respectfulness, and support towards students*" (Lemmp and Seale 2004:771). Women educators were often described as caring, expected to nurture, evaluated differently from men, and assessed on *perceived* rather than actual availability to students (Massoni 2004:3).

Within feminist paradigms, reciprocal caring revolved around responsibility and relationship rather than Kantian perspectives of rights and responsibilities. Smeyers (1999:239) defended Noddings' position as appropriate and called for recognition of "*intuition or women's ways of knowing*" (1999:233) and attention to relationships (ibid 243) especially trust and trustworthiness (ibid p242).

Sufficient "symmetrical reciprocity", necessary for Noddings' ethics of care, required communication skills to weave "*a respectful stance of wonder towards other people*" (ibid p233). Thus traditional asymmetric, hierarchical, transmission models became problematic when trust and reciprocity required care-givers to admit mistakes, and uncertainties. Reciprocal caring requires a capacity for self-care, renewed concepts of professional integrity and changing ideas of power and powerlessness, suggesting reciprocal relationships might require new forms of professional development.

CONTESTED VIEWS OF RECIPROCAL CARING

Critical voices have outlined the risks associated with wholesale adoption of alternative paradigms. For instance White (2003) argued that caring teaching, though part of the lexicon, was often ill-defined with shorthand uses allowing unqualified understandings to abound. Conceptions of reciprocity, which over-emphasised responsibilities of the caredfor might result in non-affordance of relational caring to the most powerless and needy learners (ibid). He encouraged re-visitation, refinement and critique of Noddings' definitions for instance, examination of differences between caring as relationship or as principle. Shacklock (2008:185) suggested that increased stress from work overload, associated with additional expectations of relational care "*and accompanying feelings of anger guilt and tiredness",* required research into the complex interplay between the macro and micro economic productivity of teachers work*.*

Ecclestone (2005:182) warned against cultural shifts where educators were expected to "*encourage and respond to people's emotions*" because, whilst some forms of emotional openness were empowering, a confessional and intimate form of pedagogy was not. She expressed concerns that a therapeutic ethos may lead to models based on diminished self-image where learning became inextricably linked with vulnerability: "*emotional well-being was an easier goal than developing skills and knowledge".* Shifts in balance towards affective dimensions of life and learning might constrain assessment strategies overly concerned for the emotional well-being of some groups. She identified risks that

educators might experience such uncertainty that they became unable to challenge students' ideas.

FINDING A NEW CULTURAL BALANCE

> *"Authentic social relations risk being replaced by judgemental ones, with flattening and emptying out of human relationships. Emotions, as a facet of human life, become a problematic dimension of the academic terrain."* (Butterwick and Dawson, 2005:59)

Sumsion (2000:173) called for a sustainable balance between ethics of care, day-to-day realities and competing demands of teaching, research and funding encountered by academics who needed to negotiate a path through the Noddings' idealisation of caring especially when "*mental engrossment is on the cared for, not on ourselves*". Morley (in Butterwick & Dawson 2005:59) feared that performative audit cultures, dominating many universities, might silence female values and approaches such that conflict and guilt became inescapable consequences of adherence to motherly-caring scripts, which potentially dis-empowered women academics, contributed to burn-out and disillusionment. However, conceptualising caring as a one-way, un-reciprocal relationship from mother to child, for instance, when mentors frequently likened traineeteachers to their children (Bullough and Draper 2008:175), does not necessarily fit female experiences of caring in academia or family life. Assumptions that care-giving requires intimacy or inappropriate disclosure fail to recognise skilled parents who expect children to accept and allow for unexplained emotional demands on adults and to respect privacy boundaries.

SUMMARY

Increasingly, dominant Kantian views, which hold that learning environments need to be affect-neutral, are contested. It has been argued that emotion and cognition are linked, influence choices to engage in deep or surface learning and that mentoring approaches utilising synergistic (collaborative student and educator) learning are more valuable than antagonistic models. Often teachers nominated as excellent generated positive emotions and moods which improve recall, creativity and problem solving. Environmental "control

factors", such as mood, have been related to teacher competence, enhanced learner autonomy, experience of goal outcomes, feedback and social relationships. Typologies exist for classification of emotions and hold potential value for future research. Emotional intelligence and relationship-making skills have been identified as significant qualities needing to be developed in educators. These emotional skills require self-knowledge and authenticity.

CHAPTER THREE: POTENTIAL THEORIES AND MODELS OF PROFESSIONAL DEVELOPMENT FOR FORMATIVE PEDAGOGY

> *"I have learnt that people will forget what you said,*
>
> *People will forget what you did,*
>
> *But people will never forget how you made them feel."*
>
> *Maya Angelou*

This chapter identifies theories, models and frameworks relevant to the development of formative pedagogy as a proposal for improving formative assessment. Exemplar ideas are borrowed from professional development models of social work, counselling and leadership where "use-of-self" is a core rather than "heroic" concept when deliberately developing capacities for relational caring. Potential practice, guidance and approaches identified in the corpus of literature relevant to the instrumental purpose of research question three and to curriculum design are shared.

On balance, it seems relational caring within HEIs continues to be considered risky and distracting, which surely impacts upon workforce development strategies and curricula design. This chapter outlines "*liminal, threshold concepts*", portals to new ways of thinking and "*troublesome knowledge*" possibly alien or counter intuitive (Land and Mayer, 2003) but with potential to bridge cognitive and emotional dimensions of H&PE. It moves towards suggestions for how professional development for formative pedagogy might be enhanced to promote teacher understanding of the emotional factors deemed to influence learner decisions to use feedback.

EVIDENCE OF CHANGE

Recently, The Higher Education Academy (HEA) acknowledged that complex learning is best achieved in dialogic relational contexts designed to promote dispositions towards self-assessment (Sambell 2011:5). The Quality Assurance Agency (QAA) for Higher Education (2008) also focused, not only, on engagement (devising interventions that encourage student participation in and commitment to study) but on empowerment

(facilitation of greater student control and responsibility for personal learning). However, a prevalence of judgemental modals such as "must", "should" and "ought" is noticeable throughout such documents, which potentially creates an "*an atmosphere of irrefutable authority… and undermine(s) nurturing and emancipatory discourse*" (Hyatt 2005;349). Whilst policies of engagement plus empowerment recognised cognitive processes operating within affective frameworks (Salmon 1992, Lamm 2004) parallel processes on how to deliver nurturing discourses remained under-problematised and underresearched (Mayer and Turner, 2006; Pekrun 2006; Moore and Kuol, 2007). Is it time to re-cast "heroic" behaviours of caring educators and dissemble their approach into guidance that develops the capacities of all to integrate caring-for-self and others as the norm?

Business Schools (Stacey 2010), school leadership programmes (Beatty and Brew, 2004; Crawford and James, 2006) and in relation to training of doctors, Kernick (2002): all reported withdrawal from hierarchical, transactional models of leadership. Arguably changes, which, paralleled shifts toward patient-centred care and learner-centred teaching. For instance, Schein 1985 maintained that leaders were responsible for transmitting culture through embedding their vision of organisational culture using two sets of mechanisms:

> Primary: deliberate role modelling, teaching and coaching, recognising the power of informal messages, and

> Secondary: organisational and physical space design echoing vision and assumptions from senior management.

By 2009, Schein had moved away from top-down models towards "*helping*". Helping was dependent on deliberate development of caring, emotionally intelligent leaders, responsible for creating climates for change and communication, able to offer, give and receive help in an era of distributive leadership. Schein suggested helpers adopt one of three roles - expert, doctor or process consultant - to build effective helping relationships. This resonated with literature on effective formative assessment (ibid p64).

Again, trust was deemed necessary to develop appropriate emotional epistemologies. It shaped and was shaped by emotions, so that school leaders not addressing emotions (their own and others') were likely to exacerbate resistance, obstruction and risked low morale when facilitating cultural change (Beatty and Brew 2004:31). School leadership required relationship-building and coherence-making skills which only became sustainable in appropriate social environments (Wiliam 2009:28).

Newer educational leadership paradigms embraced difficult-to-measure, implicit, frequently metaphorical practitioner theories of caring (Crawford and James, 2006). Recognising that "f*eelings and emotions are difficult forms of knowledge*" Fineman (1993 in ibid p3-7) argued that attempts to de-emotionalise pedagogy and "*keep things simple*" are inappropriate responses to supercomplex environments full of double-duties. By accepting revised paradigms, which embrace emotions, affective teaching practices could become " better *understood, explained and interpreted"* (ibid p12).

Despite evidence that leaders set patterns of emotional expression (Turnbull, 2004; Schein, 1985), workplace groups constantly discussed emotions (Turnbull, 2000:5). Although significant learning occurred within emotional exchanges (Fineman, 1997), affective dimensions remain hidden in professional development. Emotional talk and display were essential components of organisational learning (Turnbull 2004:1092) which, could openly address learned responses, codify meanings of experience, harness affective components of learning and generate appropriate display rules for communities of practice (COPs). Lave and Wenger's (1991) COP theory was challenged as being aemotional by Turnbull (2004:1089-90) who worried that old-timers predominantly conveyed, and role-modelled, neutral feeling and display rules. She further argued that Human Resource teams needed to design novel staff development interventions (ibid p1093) to introduce affective role-modelling and a wider range of "*emotional acting*" (discussed in more depth below).

Calls for recognition of complexity in medical education environments became more evident as *"very old"* inherited structures are re-prioritised to include development of leadership and teaching skills within medical curricula (Brice and Corrigan 2010:727). Whilst parallels between doctor-patient and teacher-student relationships were increasingly acknowledged, the meaning of pedagogical relationship was rarely explored (Haidet et al., 2005:17) and there are still limited references to emotion in formal medical education documents McNaughty (2013:71). McNaughty (ibid) suggested an unhelpful gap existed between norms that supported professional conceptions of the good and caring physician and the socialization processes by which medical trainees were expected to acquire capacities to create the ideal doctor patient relationship.

Concern regarding this disconnect, between formal and hidden curricula in medical schools has resulted in calls for cultural shifts away from traditional premises that uncertainty and complexity should be avoided; that hierarchy within relationships was essential and that outcomes were more important than learning processes (Haidet et al.,2005: Newman and Peile, 2002). Newman and Peile (2002:5) maintained that "*adult to adult relationships*", characterized by learning from experience through guided

reflection, would help doctors make better decisions. Le Coz (2007:472) problematised limited research into the influence of feelings and emotions on ethical decision-making in medicine. He argued that, under certain conditions, emotions enhance judgement and reason identified dilemmas when emotions (fear, pity and so on) effected discrimination and accurate decision-making, whilst insensitivity altered judgment and might sacrifice ethical principles (autonomy, non-malevolence) (ibid 473). *"In this retrospective moment of analysis of the decision, doctors also question themselves on the feelings they did not experience. They do this to estimate the consequences of this lack of feeling on the way they behaved with the patient." (Le Coz 2007:477)*

As more medical teachers are required to undertake certificates in education (AMEE 2012) they will encounter educationalists who are more likely to teach in progressive (humanist, learner-centred) styles *(Carpenter and Tait 2001:198).* Healthcare is a complex adaptive system which requires "*complex responsive processes*" (Kernick 2002:108). Two principles for managing unpredictable change included listening to shadow systems, attuning to information available from different voices and uncovering paradox to use it "*rather than avoiding it as if it were unnatural*" (ibid p109). Medical educators may require support to manage shifting paradigms between those within which they were taught and those recommended to them as teachers.

IN SEARCH OF ENABLING STRATEGIES TO SUSTAIN CARING

Most educator development programmes included some focus on formative assessment yet risks associated with formative assessment policies becoming rhetorical tools remain. To reduce risks of programmes teaching confusing and unsustainable techniques dependent "*on the letter rather than the spirit of"* AfL (Davies and Ecclestone 2008:72), revised curricula needed to provide a synergy of pragmatic and developmental approaches. Greater emphasis on attitudes, dispositions and inter-relationships between teachers and learners was needed (ibid). Wiliam (2009) advocated investment in AfL skills using a model that balanced content (evidence of efficacy and practical techniques) and processes(how) in ways that might support teacher , flexibility, capacity to take small steps and remain accountable (ibid p18). Central to Wiliam's (2009) model lies a capacity to verbalise authentic personal experience similar to Macintyre's models for enabling trainee counsellors to construct an "*emotional-self*" (1999).

Wiliam stressed communication of explicit teaching and learning intentions, arguably requiring new forms of learning contracts and strategies for development of language able to describe what teachers were doing. Figure 3:1 illustrates changes in developmental design for insights to emerge, by offering educators opportunities to "*act their way into a new way of thinking rather than to think their way into a new way of acting*" (Fuller in Wiliam 2009:28).

FIGURE 3:1 AFTER WILIAM (2009), DESIGN AND INTERVENTION.

Designer process

| Identify cognitive/affective insights | → | Synergy/ comprehensiveness | → | Set of components to provide emotional experiences |

Trainee teacher process
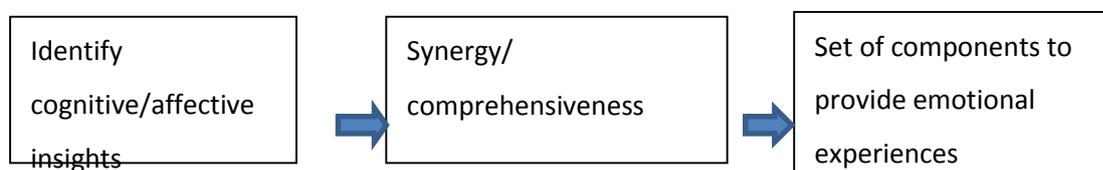
| Set of components providing emotional experiences | → | Synergy/ comprehensiveness | → | Gain cognitive/ affective insights through experiences |
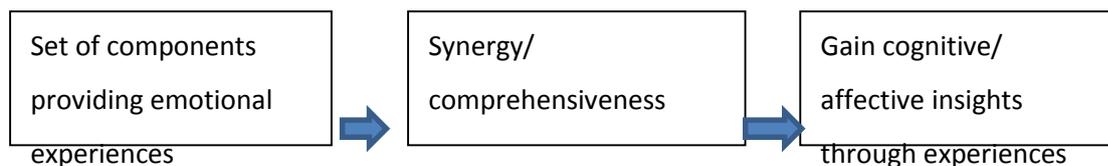
To empower trainee teachers to create "*conditions for success*" and temper their content knowledge with important principles of process, Wiliam drew on Nonaka and Takeuchi's (1995) four knowledge-conversion processes of sharing experience; dialogue; networking, and learning by doing. He recommended that staff developers create opportunities for synergy and comprehensiveness by providing emotional experiences and processing rather than talking about them (ibid: p15).

Knight et al. (2006:3) articulated how 75% of adult learning behaviour was informal and professionals learned six times more from non-formal than formal learning events. Even Nonaka and Takeuchi's influential model did not fully capture the tacit nature of teacher development. Significant differences between the development of academic and practical intelligence (Sternberg and Grigorenko, 2000 in ibid) could be missed unless staff development professionals deliberately created conditions appropriate for conversational, informal and unintentional learning. Such spaces could optimise logic-inuse, capture, codify and share explicit ideas for managing emotions. (Knight et al., 2006:5). Over-reliance on informal/unintended learning opportunities risked

unpredictable outcomes so educational developers would need methods for harnessing informal and unintended outcomes of conversation, networking and research currently part of the hidden curriculum for professional development (ibid). Macintyre–Latta and Buck (2007:189) argued that the key to becoming embodied teachers able to teach rather than deliver courses required professional development risks and opportunities to confront vulnerability, accept accountability for integrally, and mindfully negotiate teaching-learning lives.

FORMAL CREATION OF INFORMAL SPACES, FOR AUTHENTIC CONVERSATIONS

New teachers overcoming problems of isolation, survival, confidence and self-inadequacy needed safe and caring environments to negotiate crisis and social conflicts; to take risks, experience validation and positive reinforcement. Struggling in isolation with personal/ professional development would not promote their capacities to provide caring and secure learning environments for students *(Lundeen, 2004:551).* Lundeen advocated replacing impersonal induction processes with communities of colleagues, socialisation processes, creation of spaces that could invite, and model authentic dialogic exchange and caring relationships responsive to emotional and cognitive needs (ibid p560).   Supportive, collaborative and collegial mechanisms could provide new educators with spaces to manage negative emotions (Knight et al.,2006) and reduce the impact of emotional labour encountered in all teaching (Hastings, 2004:145).

FACULTY DEVELOPMENT FOR FORMATIVE PEDAGOGY

Stacey (2010:410) maintained leaders (and I'd add teachers) need to be spontaneous but not impulsive, requiring capacity for reflexivity. Moore and Kuol (2007:93) advocated faculty development strategies which engaged trainee-teachers in emotional experiences of pedagogy to enhance self-awareness development processes as components of explicit, rather than hidden curricula. Revised curricula, which incorporate affective dimensions and learning processes, could provide alternatives to hierarchical control by developing educator capacities for responding to and modelling responses to uncertainty, chaos and complexity and reduced predictability in learning and working environments. Educators in HEIs may not yet be equipped to develop and maintain emotionally aware learning environments but academic developers are

"*uniquely positioned to engage and facilitate that debate standing as they do on the sensitive cusp between logic and emotion in academic environments*" (ibid p95).

Bruner (1960) argued that teachers demonstrating "intellectual honesty" could render learning any basic idea possible. Then, within a spiral curriculum, basics can be revisited repeatedly and re-crafted until the student grasped the full formal apparatus that goes with them. Hafferty (1998) identified three, inter-related forms of medical curricula, formal (stated, intended and organisationally endorsed curriculum); the informal (usually unscripted) and the hidden curriculum. Hidden curricula included interpersonal pedagogical influences and taken-for-granted rules about learning, structure and culture of an organisation, or "*processes, pressures and constraints which fall outside… the formal curriculum, and which are often unarticulated or unexplored. It has been argued that hidden aspects of the curriculum are especially important in professional education, which characteristically includes prolonged periods of exposure to the predominant culture" (ibid p770).*

Lempp and Searle (2004:772) called for reform of the hidden curriculum to achieve the necessary fundamental changes to the culture of undergraduate medical education.

DELIBERATE DEVELOPMENT OF EMOTIONAL COMPETENCIES

Bullough and Draper (2004:278) found mentor/intern-teacher dyads showed low levels of reciprocity because tutors were perceived as therapists, resources, mothers and friends but rarely as people coping with their own demands and concerns. They echoed Tickle's (1994) call for "*a curriculum for the emotions"* and noted that mentors struggled to balance "*assistance and assessment*" (ibid p282). Strategies for coping with this double-duty included teachers' distancing themselves emotionally (potentially missing intrinsic satisfiers related to involvement in another's successful learning) or staying honest and connected, which may be unsustainable (Lasky 2000:286 in ibid).

Calls for recognition of this "*constant paradox*" (Walker, 2006:360) are growing. Strategies for balancing contradictory needs for appropriate distance (to reach critical judgements) with caring relationships (that support development) have included sharing of transparent "*sustainability principles*" (Hastings 2004:145) providing glimpses of complex mentoring relationships and management of competing demands (Tickle 1994). Sustainability required "*talk, rich interesting, open and intense talk*" (Wiliams 2001 in ibid); networks of opportunities for authentic self-expression (Bullough and Draper

2008:286); and developmental opportunities to negotiate paths through, uncover and use, pedagogic paradox (Sumsion, 2000:178, Kernick, 2002:109).

A "*strong core of qualities*", including "*strength, balance, ballast and value maturity*" would be needed to cope with the "*uncertainty, instability, uniqueness and value conflict*" that form Schon's educational "swamp" (Mcardle and Coutts 2003:236). This might best be developed through reflection but, like Boud (1999), Mcardle and Coutts (2003:226) feared, technical conceptions of reflection might dominate the original emancipatory, sense-making intentions of Schon's work. They maintained descriptivedialogic forms of reflection were best suited for enabling deliberate use of the unconscious in our behaviours and development of "centeredness" (ibid). Such reflective practice could generate confident and hopefully more resilient educators better able to manage the complexities inherent in H&PE.

Resilience, the ability to recover quickly from difficult situations and endure hardship, enabled teachers to cope with risk; ambiguity, vulnerability and protection. (Walker 2006:251). To foster resilient behaviours of adaptation and endurance, Walker advocated deliberate development of trust, interdependence and "self-theories" available through cooperative learning, where group members "*think out loud*" (ibid p256–60).

Transparent relational caring

Development strategies and models needed to balance ethics-of-care with self-care in environments unfortunately typified by individualism and self-interest (Sumsion 2000:175). Transparent relational caring required educators to be open about process dilemmas, their thoughts and hopes; what they do and why. This could enhance student self-efficacy and avoid the constraints of "*unbounded unreciprocated caring scripts*" (ibid 178). Relational caring theorists concurred that comforting and, at times, setting boundaries may require appropriate self-disclosure (Sumsion 2000:176). Reciprocal caring **for** the tutor could be encouraged when tutors created realistic expectations by communicating personal needs and available resources for example, space for scholarly activity; expected students to respect limited tutorial time and seek alternative strategies to meet needs (reducing dependency).

A quality of presence, attention in the moment (ibid) would be needed for appropriate self-disclosure. Rogers (1983:1989) concepts of genuineness, trustworthiness, acceptance and empathetic understanding are often used to train social workers and

counsellors (personal experience). Techniques and methods for developing such qualities were essential for facilitators to "create the freedom to learn" (Rogers 1983:157). Rogers believed that, like counselling, effective teaching required empathy, unconditional positive regard (active listening and wholehearted acceptance of the questions raised by another) and congruence, matching gut level experiences with expression.
"Unconditional positive regard is a non-possessive caring for the learner, an attitude which believes fundamentally that the other person is trustworthy and worth caring for.
This accepts the feelings of the other person as relevant to their learning." (Cowan 2006:200)

Sumsion (2000:170) preferred Oakenshot's phrase about creating a "*platform of conditional understanding"* as a space from which a range of routes and decisions might be negotiated. Caring teachers would then elicit and listen to students' feelings, evaluate their purposes, help them engage in self-evaluation and grow as participants in caring relationships (Noddings 1992:3; Issenbarger and Zembylas 2006:122). Caring was a "*complex of the six virtues of acquaintance, mindfulness, moral imagining, solidarity, tolerance, and self-care"* (Gilligan in Gregory 2000:445*).* Feminist literature suggested role-modelling of these virtues enhanced sustainability and succession. Presence or engrossment resonated with feminist practices designed to demystify the power dynamics prevalent in transmission pedagogy by enabling students to see their tutors as human beings and learners too*.*

HOW TO PREPARE HIGHER AND PROFESSIONAL TEACHERS FOR CARING ENCOUNTERS

This section refers to how some caring professions included training specific to use-ofself and deliberate articulation of personal feeling to shape intervention. Arguably The Higher Education Academy "UK Professional Standards Framework for teaching and supporting learning in higher education"
([https://www.heacademy.ac.uk/sites/default/files/downloads/UKPSF_2011_English.pdf accessed August 2014](https://www.heacademy.ac.uk/sites/default/files/downloads/UKPSF_2011_English.pdf)) assumed educators would implicitly utilise self-knowledge when requesting recognition. The three dimensions of their accreditation framework, relating to areas of activity, core knowledge, professional values do not explicitly mention aspects of relationship but remain generic for instance how students learn, both generally and within their subject/disciplinary area(s)(ibid p3).

Priests train to care for souls, accompany rather than cure, remain present and mindful rather than fix, adjust rather than make people healthy and perfect (Moore 1992:3). Moore argued counsellors, therapists, (and I suggest educators) must equally care for their own souls. His minimalist definition of care was not heroic but achieved through attention to, management and honouring of "*symptoms as the voice of the soul*" (ibid p5). Thus self-care pays on-going attention to how we feel (similar to Noddings' engrossment).

GP training focused less on teaching explicit guidelines and protocols than on the development of reflective professionals capable of providing sensitive feedback which, stimulated confidence for change and valuing interpersonal relationships with peers and tutors (Peile 2001:210). Key factors influencing GP training included enjoyment, enthusiasm for learning and a positive self-concept as a learner (ibid p209). GP training literature is rich in references to emotional literacy and use-of-self. It has borrowed concepts from neighbouring disciplines. For instance, Launer (1995) brought systemic family therapy ideas to promote the significance of doctor-patient relationship by focussing away from doctor performance to "*how doctors' beliefs interact with the patients' medical or personal beliefs, and how doctors and patients jointly construct meaning in the consultation.*" GPs needed to both "*debunk*" their expertise and retain it (ibid).

Social work training introduced self-sustaining behaviours for example through a process and technique of "*supervision*" which included elements of control, direction, personal support and education. Supervisors listened to oral accounts noticing how caring attitudes and approaches were being expressed and managed (Payne 1996:116) In "*what is professional social work*"? *(ibid)* a chapter is devoted to personal and interpersonal activity and the deliberate "use-of-self" in pursuit of professional goals. This self included "*attitudes and beliefs about one's own needs, goals, abilities, feelings values, prejudices, self-characteristics and methods relating to others*" (Shaw in Payne 1996:60)

Shaw's "self" was explicitly used as a framework for ascribing meaning to experiences, to filter, mediate and guide decision-making. Howe (1987 in Payne p60) maintained application of professional self-knowledge allowed social workers to utilise thoughts and feelings towards clients and develop an "*intuitive feel*" for others. A long-established outcome of social work education has been the competent application of interpersonal skills, recognition and work with feelings and their impact on themselves or others

(CCETSW 1991:16). Historically, social work curricula integrated reflective practice and emotional-relational dimensions through typologies such as Shulman (1991 in Payne 2006) and Fook (1993) summarised in Figure 3:2.

Within HEIs facilitation and supervisory styles most likely to generate learning actively reinforced learner self-concepts and utilise social interactivity with learners as appropriate contexts for reflective thinking and exploration of emotionally loaded experiences of crisis and confrontation (Carcuff 1996 in Lamm 2004:3). Lamm's study of doctoral supervisory relationships noted frequent, unprompted passionate mentions of the significance of the emotional support and content during PhD processes (ibid p4).

FIGURE 3:2 CURRICULUM MODELS FOR DEVELOPING AND USING SOCIAL WORK RELATIONSHIPS PAYNE 1996:58)

Shulman 1991	Fook 1993
Skills enabling clients to manage feelings which enhance trusting relationships	Skills for managing self and avoiding excessive stress.
Reaching inside silences	Developing critical awareness
Putting clients feelings into words	Advocacy
Showing understand client feelings	Empowerment
Sharing workers feelings	Relationship
	Social Education
Skills to help clients manage their problems which	Active use of resources

lead to feeling cared for.	Social empathy
Clarifying worker role and purpose	Social support
Actively seeking client feedback	Evaluation of outcomes
Splitting client concerns into workable chunks	
Supporting clients in taboo areas.	

> *"Emotional rules, emotional labour and emotional management are among the concepts that have proven to be analytically useful for making sense of the place of the emotions in teaching"* (Bullough and Draper 2008:284).

If sustainability is the antithesis of burn-out then formative pedagogy requires capacities to manage the experience and expressions of emotion in paradoxical contexts. For Brotheridge and Grandey (2000:18) developing an educator's capacity for managing the need to perform emotional labour ("*the need for employees to regulate their emotions in a mandated way*") was considered key to sustainable formative pedagogy.

Explicit teaching about emotional labour may add value to medical education, due to there being parallels between teacher-learner and patient-physician relationships. For example, Larson and Yao (2005:1100) considered clinical empathy as emotional labour. They found empathetic clinicians more effective and satisfied healers, concluding that conscious practise to develop attitudes and skills of empathic concern (feelings of compassion for others) would provide cognitive and emotional dimensions benefitting both patient and doctor.

Nurses faced with expectations of consistently caring, tolerant and nurturing behaviours often coped "*with stress from emotional labour by distancing themselves….and ascribed shortcomings in the emotional aspects of caring to a lack of training*" (ibid p1103).

Intrinsic emotional rewards were evident in the performance of emotional labour so long as requirements for in-authenticity and dissonance (when one feels differently from what emotion one is expressing) remained low (Brotheridge and Grandey, 2000:32). To reduce dissonance and emotional silence in organisations, Brotheridge and Grandey recommended mood regulation training (see appendix 3:1). Deliberate training to perform appropriate emotional labour might provide an alternative to emotional silence or rigid display rules.

Larson and Yao (2005:1103) maintained that training would "*benefit from the emotional labour and acting framework*". Acting methods, like emotional labour, required application of display rules, for example managing facial expressions, voice and posture. Faking emotions, known as surface acting, generated lower job satisfaction linked to depersonalisation, emotional exhaustion, suppression of emotions, reduced health and well-being and risked possible burn out. It reduced the sense of accomplishment,

whereas deep acting contributed to a "*greater degree of personal efficacy*". "Deep acting" required recognition and application of emotions actually experienced. Adapting *"techniques from acting training"* an emotional labour curriculum might include three teachable components, faking emotions not felt, hiding emotions felt, and managing emotions to meet the expectations of working environments (ibid).

DEVELOPMENT OF EMOTIONAL INTELLIGENCE FOR RELATIONAL CARING

> *"Emotional intelligence correlates with many of the core competencies that modern medical curricula seek to deliver. The application of EI as a pedagogical tool into medical education offers a new approach to improving both educational and clinical outcomes" (Arora et al., 2010:762).*

Kasl and Yorks (2002) advocated learning interventions based on an "*epistemology of balance*" (ibid p6). They suggested that collaborative inquiry facilitated by emotionally intelligent teachers could generate events and elicit emotional responses to learning experiences. This created space for articulation and presentation of links between conceptual and affective knowing, and deepened sustainable capacities for coping with intense feelings. Figures 3:3-3:4 map Kasl and York's epistemology and approach.

Emotionally intelligent workplaces emerged through and are affected by the quality of relationships, and by capacities to perceive and understand the emotional impact of change on ourselves and others. EI training programmes had limited value unless supported by organizational leadership, culture and sustained reflection (Cherniss and Goleman, 2001:9). Effective leaders modelled how to cope with anxiety whilst groups who collaborated during crises learnt coping and anxiety reduction strategies from the practical action taken (Schein, 2009). Trust, key to group collaborations, grew out of reciprocal care and concern involving both expectation and obligation (ibid 2001:134). Figure 3:5 outlined the process of following one group process unpicking of an emotional experience in an emotionally intelligent environment.

FIGURE 3:3: BALANCED EPISTEMOLOGY AFTER KASL AND YORKS 2002
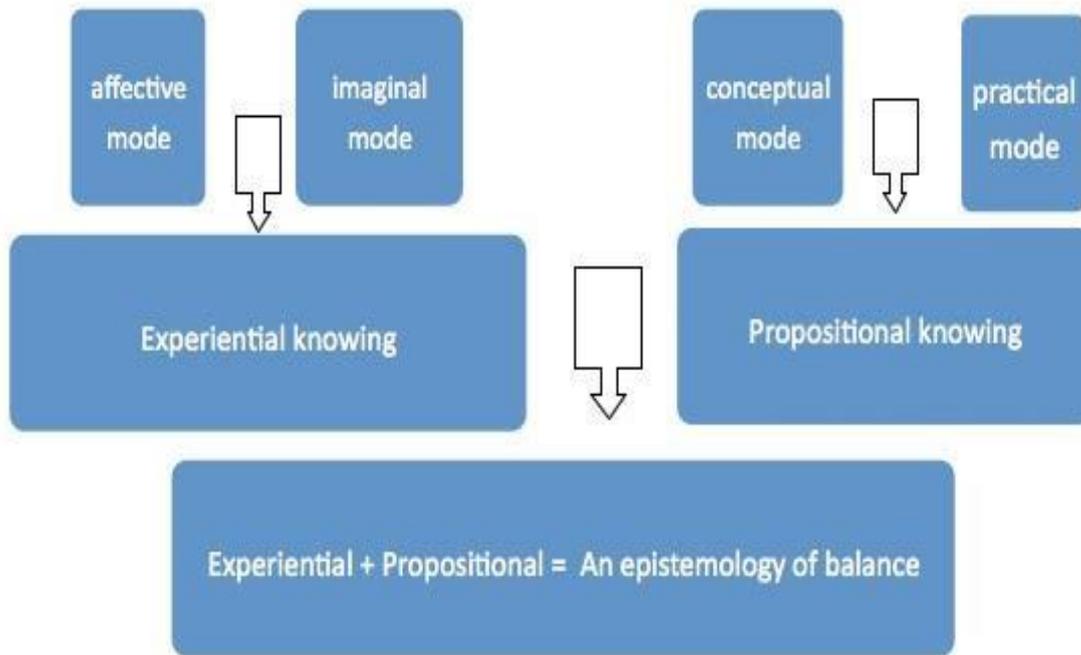
FIGURE 3:4 ADAPTED AFTER KASL AND YORKE 2002:20
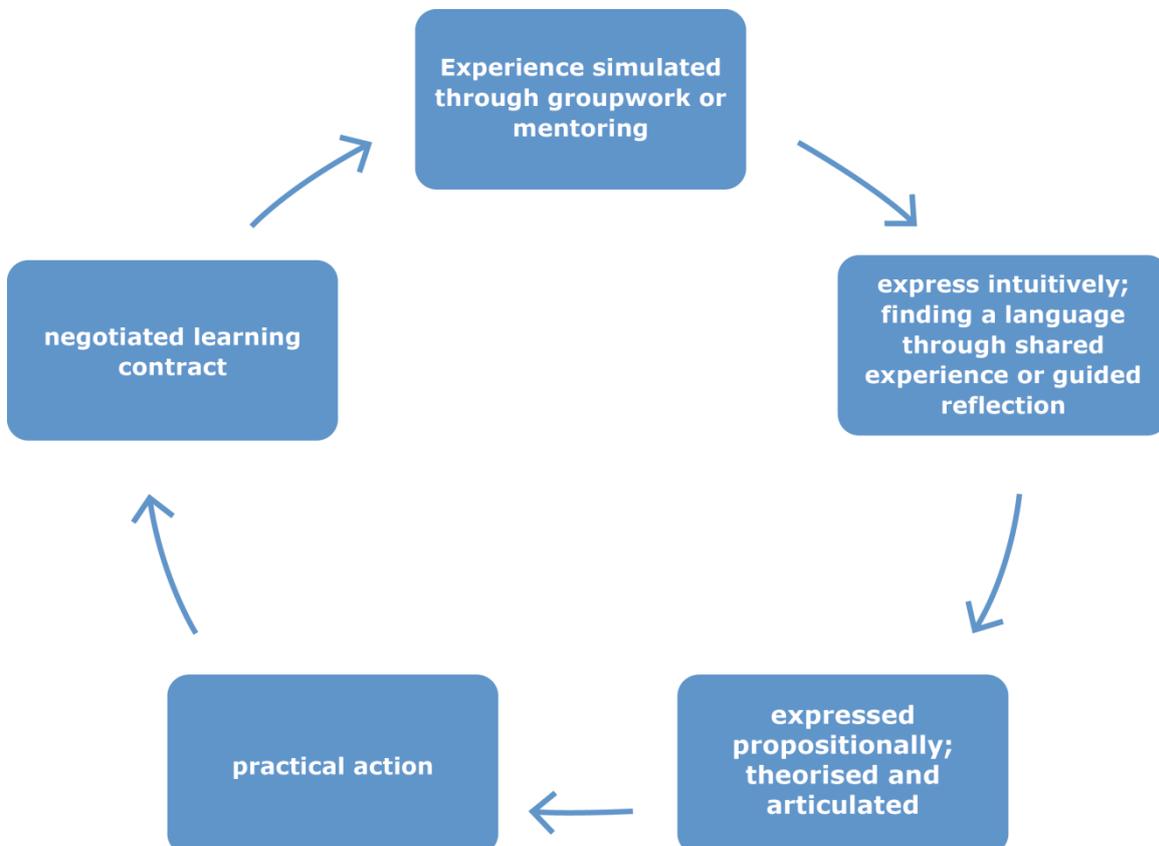
FIGURE 3.5 BEATTY AND BREW MODEL FOR GROUP INTENSIVES IBID: 2004:333

Unexamined emotional self

Experiencing self as emotional

Restorying self through sharing of
self as emotional

Connecting with the other through the emotional self

Reconnecting with the self through the
emotional other

Connecting with the self and other through the
emotional self as emotional knower
– deepened emotional epistemology
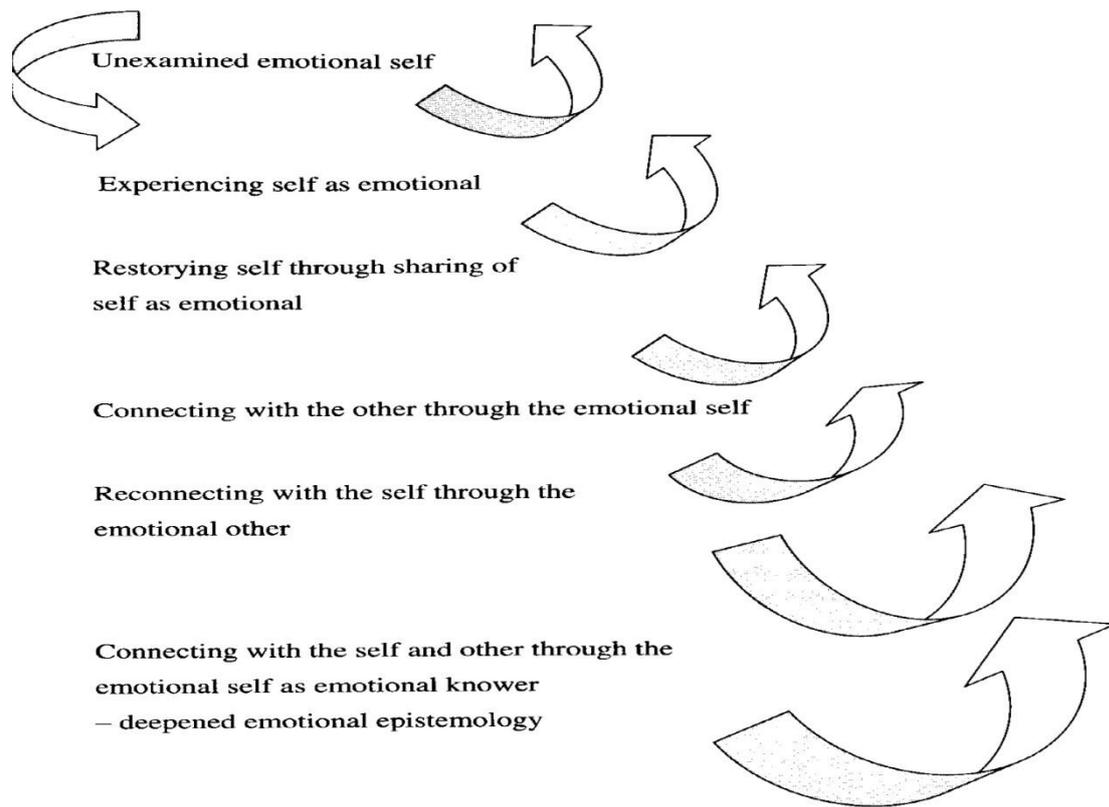
EXEMPLARY APPLICATIONS OF EMOTIONALLY INFORMED WORKFORCE OR

ORGANISATIONAL DEVELOPMENT

Firstly, research into and pedagogy for school leaders provided one exemplary
application of emotional epistemologies. Beatty and Brew (2004*:331-2)* reported that,
despite rhetorical recognition of the relational nature of school leadership, head teachers
felt "*their emotional selves were anything but welcome in their work",* confirming how
"*institutional power relations thwarted attempts to develop emotional epistemologies".*
Institutions adopted four strategies. 1 & 2 (silence and absolutism) correspond to
deemotionalised workplace experiences, whilst 3 & 4 (transitional and
emotionalrelativism) have enhanced sustainable dispositions, for instance, resilience and
metacompetence (ibid 334-5):

1. "*emotional silence*" - ignoring, suppressing or wrestling to control emotions to
   retain the illusion of rationality;

2. *"emotional absolutism"* - denying the authentic self by identifying feelings as
   right or wrong and rewarding accordingly;

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3. "*transitional-emotional relativism*" generating temporary excursions by employees into emotional realms often accompanied by the shame of rulebreaking and a return to emotional silence; and

4. "*emotional relativism*" **-** where teachers acquiring "*sustainable predispositions".* Institutions which fail to modify "restrictive feeling rules" reduce emotional knowing, generate alienation and disconnectedness and are likely to encounter resistance to change and possible low morale (ibid p330). Beatty and Brew found that more than 50% of educational leaders studied remained emotionally silent rather than risking being characterised as weak, stupid or ridiculous (ibid p338).

Beatty and Brew (2004) advocated that all head teachers in training lead by example (because of risks of emotional wounding and vulnerability) in order to create cultures of "*emotional safety".* Such cultures would be characterised by respectful, caring, supportive environments, explicitly introducing new vocabularies and habits of mind. At Monash University they developed a facilitative approach that involved head teachers in "*group intensives*", where participants "*story and re-story inevitable previous woundings*" to enhance emotional meaning-making and meta-meaning-making to develop emotional sensitivity (See Figure 3:5). Following group intensives students were better able to catalyse transformational conflict resolution, engage in professional reflection and integrate personal and organisational self.

The Relationship-Centred Care Initiative (RCCI) at Indiana demonstrated how cultural change was generated and that conditions for activating positive emotions could be achieved through a non-prescriptive appreciative inquiry strategy (Cottingham et al., 2008). For instance, their change strategy exemplified distributive leadership and led to a nine-competency curriculum framework which included "*self-awareness, self-care and personal growth" (ibid 716).* Improved practices in meetings, procedures, programmes and explicit communication about institutional culture were attributed to the RCCI, which reduced discussion about, and increased acting on, what can be described as a hidden curriculum.

Similarly learning contracts were found to be useful tools for motivating self-directed learning and enhancing learner control (Anderson et al., 1996:11). Mutually-negotiated learning contracts enhanced empowerment and accountability in social work education by promoting self and formative evaluation and processes with reduced power-disparities (ibid). Lemieux (2010:272) found learning contracts clarified expectations; motivated

students to revise initial drafts and simultaneously modelled professional integrity and social work values (for example client empowerment).

> *"Students felt they had decision-making power, and reported a sense of personal responsibility for their learning experience. They also demonstrated significant improvements in performance after revising their assignments. The findings suggest that learning contracts are an effective tool for responsibly sharing power and promoting better performance outcomes" (ibid 262).*

Tutors at Keele University invited medical students to set the "emotional temperature" expressed by simulated patients (experienced actors) during their first experience of emotional interviewing. This "*emotion setting switch*" increased the sense of control for 86% of learners, who reported feeling more confident and comfortable during communication skills role plays (Lefroy et al. 2011:355).

IDEAS FOR THE DEVELOPMENT OF SPECIFIC RELATIONAL CARING SKILLS

SAFETY-NETTING EMOTION ELICITING EVENTS

Macintyre (1999:6) researched the potential of facilitated group-works for constructing "*personal selves*" and learning emotional talk in a process called "*self and other awareness*". Tutors modeled the creation of a "*safe skin*" enabling a group of learners to process feelings and find words or metaphors to convey emotions to each other. The intention was the development of a common emotional language and capacity to move from unconscious experience of feelings to conscious experiences. Their experiential model offered a means of translating intellectual awareness into behaviors responding to emotions. This resonated with Rogers' "core conditions" for person-centered counseling (1990:221). The safety-netting on their programme was through mutually-agreed learning contracts between group members and facilitators who role-modeled authentic, transparent and empowering relationship-centered facilitation*: "We undertake to be truthful, except that if asked a question that is too risky to answer, we will say it is too risky to answer"* (Macintyre 1999:4).

Cherniss and Goleman (2001) diagrammatically represented the connection between emotional processes, trust and group beliefs in the emotionally intelligent workplace. They highlighted the importance of perspective taking within the working environment.

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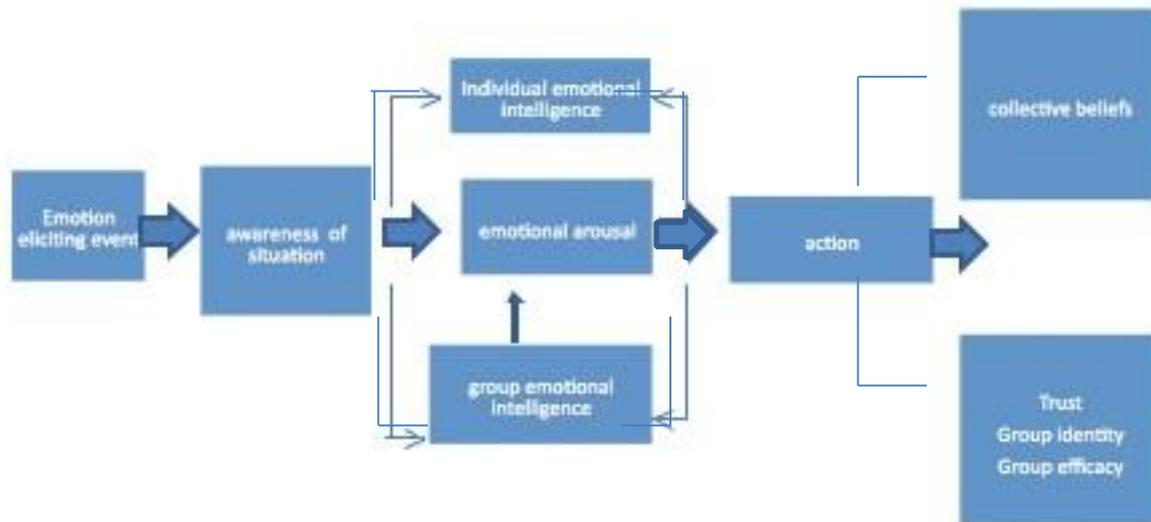
RE-CONSIDERING ARTICULATION OF POLICY AND GUIDANCE TO MINIMALIZE DOUBLEDUTIES

Authors, such as Macintyre (1999) and Noddings', (1998:25) called for us to move away from prescriptions that reduced *"the need for human judgement with a series of thou shalts and "thou shalt nots".* Walker et al., (2006) feared discourses of shouldness because shame-based pedagogies undermined development of resilience and Sumsion (2000:170) challenged our desire for *certainties in policy imperatives. Arguably these voices suggested we need to uncover tensions that generate double duties rather than avoid the impact of emotional responses.* Curriculum developers need strategies that create conditions and opportunities for trainee-educators to experience and develop dispositions for relational caring. Sumsion (2000:174) valued Tom's (1997) list of dispositions for relational caring –

- *transparency*,
- responsiveness,
- genuineness,
- presence,
- reciprocity, and
- deliberative relationships.

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Learning to enact responsibility for deliberative relationships could emerge from reflective practice and commitment to mutual responsibility. Sumsion suggests teachers can learn this by

> *"pause(ing) between the experience of an impulse and its expression… In that pause, however brief, we interrogate the impulse: Does it serve the long-term obligations of the relationship? If the answer is No, we refrain. In this way, the thoughts and feelings expressed in the deliberative relationship are both genuine and controlled. Learning to be deliberate in relationship requires learning to pause, to ask, and then to act responsibly (ibid p175).*

OVERCOMING ISOLATION OF EDUCATORS AS LEARNERS

University lecturers are often situated in subject or discipline specific teams but isolated in relation to their development as educators. Cornford and Carrington (2006:276) found GP trainee schemes overcame similar risks of isolation in local practices by weekly halfday facilitated peer-group meetings. These meetings aided professional development, cultivated empathy and clinical performance especially through role-modelling by learner-centred tutors. Trainees, struggling to join new communities of practice expressed desire for more feedback, in the form of reassurance, support and positive feelings of being competent doctors: "*These complex forms of feedback are apparent only within and through relationships*" (ibid 279).

CONGRUENT TEACHING OF THE INTER-RELATIONSHIP BETWEEN AFFECTIVE AND COGNITIVE DIMENSIONS

Lake et al., (2004:5) noted the irony when pre-service teacher education programmes referencing Noddings' "ethics-of-care" failed to model relationship-building skills. They advocated teacher-educators processes in HEI role-model caring encounters; engagement in dialogue around emotional caring; and helping student-teachers to understand the impact of caring relationships on learning. Such relational skills needed to be balanced with curriculum content such as Vygotsky's relational conceptualisation of

the zone of proximal development (ibid 2004:6)[4]. Operationalizing relational-caring curricula would require adaptations to current instruction and management systems with new modes of trainee-teacher support (ibid). A specific idea for developing practical and relationship-building knowledge would be to ask teacher-educators to specify input on caring encounters (for example specific caring gestures words and actions for greeting and interacting with students) in their lesson plans (ibid). Older adversarial models of medical education, characterised by fearful students unable to ask questions of emotionally disconnected teachers, could not demonstrate or role-model how to form caring relationships with patients (Haidet, 2005) and could potentially impact negatively on self-esteem and learner well-being (Kernis, 2003).

Mann's (2004:208) terminology clearly explained the need for coherent, emotionally positive learning environments with fewer gaps between learner and teacher experiences and expectations of emotional display:

- *"emotional harmony"* (match between displayed and felt emotions with display rules)
- *"emotional dissonance"* (mismatch between displayed emotions and the display rules but not with authentic feeling)
- *"emotional deviance"* displayed and felt emotion match but do not fit organisation display rules)

REFLECTION AND MINDFULNESS TOOLS FOR SELF-AWARENESS

Reflection enabled learners to assess and assimilate both feedback and emotional responses to feedback (Sargeant et al., 2009:406). Sargeant did not dwell on reflection, rehearsed elsewhere, but, like Cowan (2006:51) called for technical definitions such as "*ordered, systematic application of logic to a problem in order to solve it*" to be balanced by humanist perspectives. Such innovative educators continued to optimise choice by flavouring reflection with risk-taking, openness (ibid p40), recognition of emotional triggers, metaphors, patterns and affirmations (ibid p36-51). Cowan suggested audio

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[4] "*distance between the actual developmental level as determined by independent problem solving and the level of potential development as determined through problem solving under adult guidance, or in collaboration with more capable peers*" (Vygotsky, 1978:86).

recordings of teaching events be used to "*prompt recall of thoughts and feelings*" during professional formation of University teachers.

In "*using experience for learning*" Boud et al. (1993:77) expanded their seven-step reflective model (revisit experience; attend to feelings: association; integration; validation and appropriation) and separate components of experience "*noticing and intervening*" to stress the significance of preparation, milieu and intent (see figure 3.7). This required educators to notice and attend to feelings.

MINDFULNESS

Mindfulness is "*a kind of non-elaborative, non-judgmental, present-centred awareness in which each thought, feeling, or sensation that arises in the attentional field is acknowledged and accepted as it is*" (Bishop et al. 2004;232). It reduced stress (Warnecke et al. 2011) and could develop greater awareness of connection to others; *enhanced self-concept, self-esteem, benevolence, impulse control and ability to handle stress" (Orr 2002:493).* Karen Mann (2008) believed the deliberate development of mindfulness by doctors could extend reflexivity; improve diagnostic accuracy, minimise errors and improve ability to choose and use strategies.

FIGURE 3.7 THE ROLE OF MILIEU, PREPARATION AND INTENT IN DEVELOPMENT OF REFLECTIVE PRACTICE (BOUD ET AL. 1993:77)
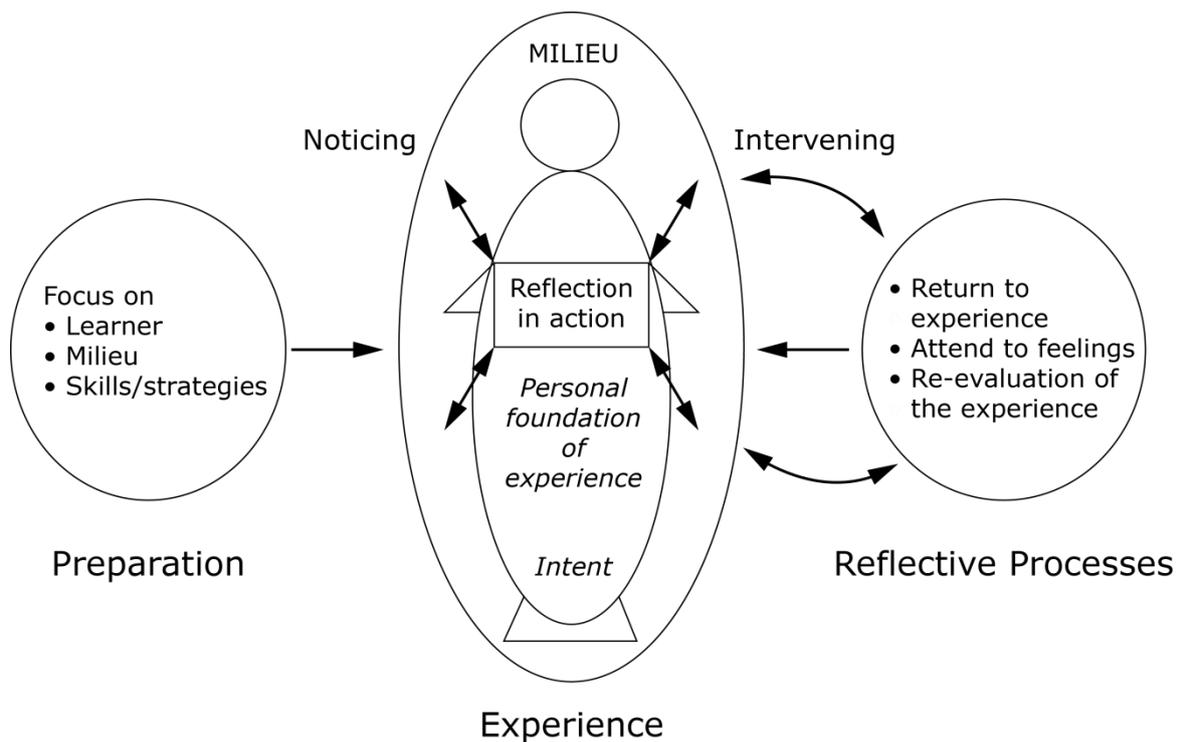
Reflection, as a link between receiving and using multisource feedback (MSF) showed "*the nature of the feedback, self-perception and expectations, feedback credibility, specificity and consistency with other feedback*" to be factors influencing whether or not improved performance occurred (Sargeant et al., 2009:401). The researchers analysed the decision-making process in four stages consistency with self-perception; emotional responses to inconsistent or negative feedback; assimilation of feedback and emotional response (decision-making); and planning for action (ibid).

Their findings suggested reflection-on-feedback and emotional responses to comments were significant determinants of whether feedback was assimilated and used. Verbatim responses to feedback, for example "*I was really upset*" and "*I couldn't reflect at first because I was too emotionally fragile*" (ibid p404) directly pointed towards affective dimensions influencing take up of feedback. Figure 3:9 shows Sargeant's model for structuring post-feedback conversations and maintaining transparent and authentic relationships.

FIGURE 3:8 MODEL PROPOSED BY SARGEANT ET AL. (2009: 406).
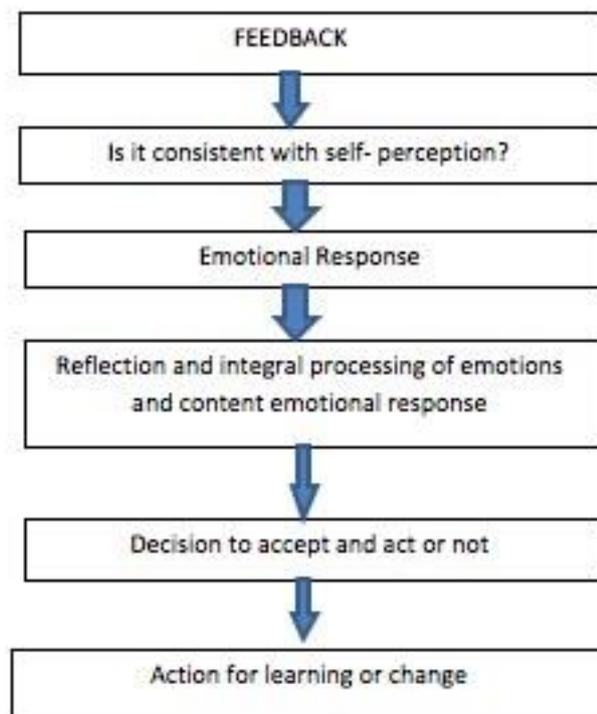
SUMMARY

This chapter explored alternatives to heroic concepts of emotionally silent workspaces. It drew on literature which engages with the troublesome notions of emotions, feelings and mood, to identify how these might be used to enhance learning in general and feedback in particular. The literature calls for policies with fewer imperatives, which pay greater attention to how faculty development curricula might enhance emotional intelligence and reduce the need for emotional labour. It offers models for developing sustainable emotional competency and recommends epistemologically-balanced curricula with safe spaces for emotionally-authentic exchanges between less isolated professionals. Enabling strategies include knowledge conversion through shared experiences, dialogic exchange, networking and learning by doing. New approaches to staff development can include role modelling and introduction of emotionally-informed learning contracts based on transparent curricula modification that enhance and enable reciprocal relationships. Educators are encouraged to make legitimate use-of-self in mostly authentic ways and to acquire the capacity to fake emotions not felt; hide emotions felt and manage emotions not appropriate to their role when necessary. Such curricula adaptations could enhance resilience and reduce experiences of double-duty associated with the risk of burnout and unsustainable teacher behaviours.

CHAPTER FOUR: OBSERVING, SURVEYING, INTERVIEWING AND INTERPRETING

DEVELOPING RESEARCH QUESTIONS

Work-based research often draws on tacit grounded theory and the experience of naturally-occurring phenomena to shape research questions (Edwards, 1994:28). Here questions emerge from a typical three-stage approach: *development* (from theories or practice problems which become the basis for all subsequent decisions); *linking* (to methodology considered and applied), and r*efinement* (through attention to what has gone before, avoiding pitfalls & identifying new directions (Light et al., 1990:18)).

One "*new direction*" was the conceptualisation and definition of "formative pedagogy" (Jones 2007) as a phenomenon of interest based on previous experience as an educationalist in health and social care and, more recently, medical education. Two loose hypotheses were proposed, that emotional and relational aspects of formative pedagogy have been under-conceptualised and under-researched and "imaginal" or "expressive" forms of knowing and learning are used tacitly but under-reported or under-developed as pedagogic strategies

Three research questions were developed to get "*assumptions out into the open*" (Robson 2002:135) and subsequently informed all subsequent sampling and methodological strategies. (To remind readers) they are:

1. What are teachers and learners' perceptions of pedagogical relationships? How do they differ?

2. How do the emotional cultures of learning environments influence the effectiveness of these relationships?

3. How might the deliberate use of pedagogical relationships impact on the effectiveness of formative assessment?

IN SEARCH OF EVIDENCE, UNDERSTANDING AND PRAXIS

The purpose of this study was empirical (in search of evidence), interpretive (in search of understanding) and instrumental (in search of praxis). In each of four diverse fields of adult education for human development (AEHD), parallel methods were applied to produce individual case studies of the emotional cultures and affective dimensions underpinning pedagogical activities. Choosing four case studies is an example of "*thinslicing*", a term applied to cross-sectional sampling methods in the sciences. Meyer and Turner (2006: 387) suggest this method activates "*our unconscious to find patterns in situations and behaviours based on a very narrow slice of experience*" denoting researcher ability to "*determine the most significant constructs within a complex context for understanding and predicting human perceptions and behaviours*".

These four case studies were used to consider evidence of formative pedagogy-in-action and ponder interventions with the potential to enhance the capacities of educators to manage emotions, their own, and others'. The choice of four dissimilar case examples was emergent and deliberate in an attempt to isolate phenomena of interest in quite disparate examples of teaching adults. As a member of the medical educator community of practice I realised from personal experience, anecdotal evidence, and searching the literature that affective dimensions were not prioritised and thus deliberately sought diversity choosing only one HEI setting.

Exploration of these qualitative research questions was deemed to require empirical and interpretative approaches. The former to generate evidence of the nature of perceptions

of pedagogical relationships and enable comparison between teachers and sample groups of learners, the latter to interpret the meaning of both descriptive statistics and verbal responses. This combination of quantitative and interpretative methods was adopted to provide insight into the expression and meaning of reciprocal relational caring. A combination of descriptive statistics and narrative analysis was chosen to enhance the quality of the case studies, justify arguments and provide instrumental outcomes.

Descriptive statistics were gathered using fuzzy logic, a useful tool when imprecise use of numbers is tolerated as a means of maintaining "*rapport with reality*" (Zader 1996:103). Fuzzy logic invited application of numerical values to hard-to-measure, subjective experiences such as confidence, trust and care, generating quantitative data through Likert scale items in the questionnaire.

The application of narrative inquiry and analysis signalled preoccupation with language, power and meaning-making. The underpinning methodological epistemology sought to outline preliminary evidence from specific events (teaching episodes) and then generate possible understanding of the pedagogical meanings and significance of these events for participants and, more generally, for HE professions and their sponsors.

As exploration of subjective fields like emotions, feelings and mood is difficult to achieve in controlled laboratory conditions multiple methods and triangulation were deemed more appropriate to validate and enhance credibility of the data gathered and the interpretations made. "*Triangulation is less a tactic than a mode of inquiry by selfconsciously setting out to collect and double-check findings, using multiple sources and modes of evidence, the researcher will build the triangulation process into on-going data collection*" (Huberman and Miles 1994:438).

This combination of interpretive and narrative inquiry was also fit-for-the-purpose of connecting organised action to contextually embedded meanings by looking "*less for the sorts of things that connect planets and pendulums and more for the sorts that connect chrysanthemums and swords*" (Geertz, 1980:165).

Analysis of both narrative data and numerical data added depth of meaning and allowed perspectives to emerge. An interpretative approach might identify patterns of formative pedagogy caught in the soft spaces of language, behaviours and attitude lost to a more quantitative approach. Hopefully, articulation of new interpretations and perceptions of elements influencing AfL will contribute credible ideas to discourses about staff development strategies and promote sustainable formative assessment.

The approach compared four dissimilar cases through the lens of an emerging concept: formative pedagogy. It assumed that audiences can learn about their own communities of practice by listening to and empathising with stories and voices of others (Hones 1997:13). The holistic, relativistic and contextually-shaped orientations of narrative inquiry are "*inherently grounded in shifting and contestable readings of text*" (Josselson and Lieblich, 2001:277-281). Thus, the hermeneutic, interpretative methodology was well aligned to the research questions and understanding of factors that impact on the relational caring suggested as necessary for formative pedagogy.

CASE STUDY: THE PRIMARY METHOD

A case is "*a bounded system*" (Denzin and Lincoln, 1998:87). Case study is an appropriate central strategy for "*empirical investigation of a particular contemporary phenomenon within its real life context using multiple sources of evidence*" (Robson 2002:146). This mixed-method, case-study approach was designed to generate *thick descriptors* of formative pedagogy in four distinct emotional cultures, then considered together to illuminate implicit rules or meta-rules with relevance beyond the four contexts to the wider field of H&PE and medical education in particular.

Developing thick descriptors was appropriate for this essentially phenomenological enquiry because they "*.. portray the complexities of a situation, the multiple realities, the interactions of the investigator and respondents … (and) provide the reader with a means of bringing their own tacit knowledge to bear*" (Neville et al., 1994:13).

Descriptions of complex, individual and cultural meaning afforded to events, behaviours and objects sometimes take novelesque forms, such as "*stories, anecdotes, vignettes, examples to illustrate and quotes from interviews and conversations*" (ibid p15). Where quotes are used they are crossed referenced using the convention set out in Table 4.1

TABLE 4.1: CONVENTIONS FOR IDENTIFYING QUOTES

Code	Source
QT(A/B/C/D)	Questionnaire tutor
QS (1 -11)	Questionnaire student
O	Observation transcript
I (A/B/C/D)	Interview transcript

ISSUES OF GENERALIZABILITY

"All generalisations are false including this one" (Mark Twain)

The specific cases studied were not the target audience for dissemination of findings, as conclusions would be of more interest to educationalists, staff development professionals, specialist formative assessors and medical education stakeholders. Hones (1997:2) argued generalizability to be an inappropriate measure of effectiveness for hermeneutic and narrative research, better evaluated by whether the storytelling conveyed understandings of plot, characters, time and place to the audience. Constructivist interpretive research, such as this study, allows commonalities across lifestories to be uncovered and ensured a circle of meaning sufficient to "*relate the stories of scholars to the current society*"*(ibid).* *For* Robson (1993) generalizability measured external validity, threats to which might be managed by convincing others that cases studied were representative. Limited claims of generalizability or representativeness are made for this study where criteria of transparency, trustworthiness, verisimilitude and recognisability were applied to generate positive responses to the question *"Is there sufficient detail on the way the evidence is produced for the credibility of the research to be assessed" (Robson1993:75)?*

SAMPLE, SELECTION AND CRITERIA

The sample of four cases was purposive (identifying distinctively different types of pedagogies and including an international component) and opportunistic (using my role as a medical educationalist and a five rhythms dancer). This afforded credibility and trustworthiness necessary to negotiate access. The four cases were chosen using an emergent hermeneutic typology (See table 4:2) to identify their distinctness from each other (Neville et al. 1994:7). They were:

A. **GP** (General practitioner): weekly tutor-facilitated groups of about 25 trainee GPs
B. (Shaolin) **Kungfu**: Taught drop-in classes for mixed ability and advanced groups
C. **5Rhythms**: Weekly drop-in authentic movement classes of two hours
D. **Undergraduate** (medicine): formal lectures on respiration to first year medical students.

This professionally-informed selection aimed to provide a mixture across the following parameters:

- Formal to informal learning;
- High to low stakes assessment;
- Traditional to evolving curricula;
- Corporeal (physical) to cognitive learning; and
- National to international identities Researcher familiarity with the community of practice / subject (insider / outsider research. My relationship to each case is rendered transparent within the typology (see Table 4.2).

Whilst undergraduate medical and GP education have theoretical evidence bases, Shaolin Kungfu and 5Rhythms have tacit, practical and physical theories. Culturally-situated teaching models developed in the Shaolin Temple, Henlan Province, China have

remained relatively unchanged since the 13th century, whilst 5Rhythms is a relatively new phenomenon. Both epistemologies of practice use feedback in distinct ways but offer limited theoretical evidence-base for review. Shaolin traditions are teachercentred, apprenticeship models requiring obedience and loyalty to expert masters with limited tolerance of peer-feedback.

5Rhythms teaching is predicated upon learner self-assessment plus feedback to the whole group allowing self-directed dancers to choose whether to use it for personal development.

The sampling parameters were designed to shape a case selection process (Robson, 1993:156) and provide *"snapshots of reality"* (Caulley, 1994:71) of four distinct pedagogic practices. This resulted in drop-in sessions with no summative assessment (Kungfu and 5Rhythms) versus on-going trainee GP workshops of one year duration and a short series of lectures to 200+ first year medical students (high stakes, formal, required).

Unluer (2012:1) outlined the advantages and disadvantages of qualitative case study research conducted by insiders and outsiders. She defined these positions as ranging from complete membership of groups being studied (such as my position in relationship to the 5Rs study) to complete outsiders (as with my role in relation to Kungfu). The advantages of insider research included speaking the same language; understanding local taboos; knowing informal and formal power structures and having access to information (ibid p5). In comparison disadvantages of insider research included

management of dual roles: overlooking routine behaviours; making assumptions and proximity to situations reducing capacity to see the bigger picture (ibid p6). To overcome these potential risks and optimise opportunities afforded by my relationship to each case study I actively sought to remain transparent to the participants. More details of strategies for managing participant observer roles are outlined within each case study.

TABLE 4.2 SAMPLE PARAMETERS AND COMPARISON OF FOUR CASES STUDIED

Case study Sampling parameter	A: GP	B: Kungfu	C: 5Rhythms	D: Undergraduate
Nature of learning environment	GP; Post Graduate Education Professional development, specialisation.	Shaolin Academy Traditional Chinese Martial Arts	Movement based personal growth practice	Anatomy applied science traditional Western
Formal and informal learning	Formal, published learning outcomes preparation for entrance examination.	Informal, self - selected. optional to progress and follow formalised assessment	Informal. No right or wrong way to practice. No assessment structure.	Formal published curriculum and summative assessment criteria.
High and low stakes assessment	Postgraduate high stakes entry requirement for specialisation	Low stakes. for most Western learners	Low stakes.	High Stakes. Entry requirements for medicine & range of specialisms.
Traditional and Evolving curricula	Traditional and evolving in relation to changing concepts of medical education	Traditional Chinese, cultural models	Evolving, framework for practice. Responsive to group process.	Traditional study of six year duration. Encounters with numerous teachers.
Physical and cognitive practices	Mixed but primarily cognitive	Physical	Mixed but primarily physical	Cognitive
Settings	Training room in HEI or NHS setting	Shaolin Temple classes in The UK.	5Rhythms workshop. Dance /exercise space or community hall	Lecture theatre/within HEI. Published schedule.
Actors	Work-based educators/ lecturer and specialist medical trainees.	Experienced martial arts. Master and students.	Experienced 5Rhythms teacher and workshop participants	HEI lecturer/ scientist and undergraduate medical students
Events	Half-day release programme of seminars and professional case discussions	Open classes and or training for next belt.	Weekend intensive workshop or drop-in	Lecture series
Processes studied	Large and small group possible peer group presentations/ discussions.	Kungfu training sessions	Open or drop-in5Rhythms workshop.	Teaching sessions and sample of formative group feedback.
Researcher relationship/ experience	Some contact with GP education-tutors on medical Education Masters Programme Researcher as observer	Outsider only contact with kung fu through popular media e.g. Films Kill Bill Researcher as observer	Insider. Regular participant in 5Rhythms workshops Researcher as participant observer.	Some contact with undergraduate medical education but not science lectures. Researcher as observer

MIXED METHODS: OBSERVING, SURVEYING AND INTERVIEWING

The methods deemed most fit-for-purpose were, survey / questionnaire, observation and semi-structured interviews (professional conversations) which collectively might provide insight into the meanings, attitudes, rules and perceptions of relational and emotional exchanges operating in each case studied. To aid comparison, similar data capture methodologies were applied to all four case studies.

To enable learner and tutor participants to understand my researcher aims and purposes administration of the questionnaire was followed by the observations with tutor interviews the last method applied in all four cases. The similarities and differences between data gathered, using each method, spoke to each other proved illuminating in relation to the emotional dimensions of formative assessment and threats to sustainability of learner teacher relationships.

Several one-minute papers are included as appendix 4:1 to provide narrative autobiographic accounts of significant moments during the research process. Minute papers are valued as examples of best formative assessment practice (Stead 2005). Learners write brief answers to two questions: What was the most important thing you learned from…? Then what question is unanswered? Here they were adapted to share process and illuminate key affective points from my perspective as a doctoral student.

DATA CAPTURE METHODS AND INSTRUMENTS

The rationale for the three methods used to gather data for each case study are provided in the following sections. They are:

1. Questionnaires administered to a sample of (9-11) volunteer learners and 1 tutor in each case

2. Questionnaires administered to and semi-structured transcribed interviews with the pedagogues and

3. Transcripts of at least two observations of learning episodes

QUESTIONNAIRES

This self-administered instrument took account of a range of guidance to shape each of eleven items, for example, specificity of questions, effective ordering and wording of questions to optimise response rates (Robson 2002:247). Initially the De Vaus (1996:83-86) wording checklist guided the use of simple language, short questions and avoidance of leading and multiple questions. The terms feeling, emotion and mood were

not mentioned in order to "*eliminate cues which lead individuals to respond in a particular way*" (Robson 1993:232).

The layout was enhanced using the online survey development and analysis tool, Survey Monkey. The same questionnaires were used on all occasions, with minor tailoring of language and terminology to increase respondent understanding, for example 5rhythms teacher, GP tutor, A blend of sentence completion, Likert and rating scales plus open questions were used to allow affective language to emerge.

Aspects of the questionnaire were piloted in three of four case studies (not undergraduate lecture- a limitation discussed later) throughout the questionnaire development stage. The rationale behind each item is listed in table 4.3 below. Amendments to these items, for instance, the list of qualities in items 8 and 9 (see appendix 4.2) were made in response to comments from participants in the pilot studies.

PROFESSIONAL CONVERSATIONS

"Every interview is an interpersonal drama with a developing plot" (Denzin and Lincoln 2000:663)

Unlike semi-structured interviews, which focus on control and prediction (Cohen and Manion 1989) these "*interviews*" were purposeful professional conversations "*essentially heuristic; to develop ideas and research hypotheses rather than to gather facts and statistics…… often emotionally loaded…. Only a highly skilled interviewer can get people, over a period of an hour or more to talk freely with some degree of insight about their thoughts, feelings and formative experiences"* (Oppenheim 2000:66).

TABLE 4:3 SUMMARY OF RATIONALE FOR ITEMS IN QUESTIONNAIRE

Item	Wording / language	Rationale
1 & 2	Demographic data and consent	Details and Follow up
1	How often have you worked with students/ tutor before? Single response	Identify level of familiarity
2-4	Sentence completion. Data for open	Allow affective language and terminology to emerge in relation to

	coding. I (believe students) come to this class because… I hope students level this class having… Things that might get in the way of learning are…	➢ Motivation ➢ Hopes and aspirations ➢ Perceived obstacles and responsibility
5.	Sentence completion. Data for open coding. I would describe my relationship with tutor/ learners...	Allow language of pedagogic relationship to emerge
6.	A Likert rating scale of confidence in ➢ Achievement of goals ➢ Motivation to achieve ➢ Tutor feedback helpful ➢ Tutor "Help" improve practise ➢ Enjoyment	Confidence is perceived as one form of trust. Help is perceived as a form of relational caring. Enjoyment considered a factor in learning.
7.	A Likert rating scale of expectations of aspects of pedagogic relationship ➢ Care ➢ Noticing individuals ➢ Trust ➢ Respect ➢ Significance of relationship	Questions regarding expectations were designed to compare and contrast understandings of the nature of the learning contract and the emotional-cultural learning environment.
8	"Top-ten". Choice of qualities a tutor should bring to learning event.	These items were designed to generate similarities and differences between teacher and student understandings of learning roles and contracts and also for comparison of emotional cultures between case studies.
9	"Top-ten". Choice of qualities students should bring to learning event.	Designed to generate similarities and differences between teacher and student understandings of learning roles and contracts and also for comparison of emotional cultures between case studies.
10	Multiple choices of type of feedback expected.	Designed to establish similarities and differences in the understanding of feedback within and across cohorts. An assumption that similarities and differences between tutors and learner would illuminate the nature of the learning contracts and triangulate with professional conversation and observations.
11	Feedback on research process	

They required sufficient skill to create conversational flow and cope with three "*belowthe-surface*" activities: traffic (informal agenda and time) management; following a hidden agenda ("*to collect precepts and ideas and improve the conceptualization of the research problem*") and maintaining rapport (Oppenheim 1992:70-2). My background in systemic family therapy; social work, counselling and feedback from previous research provided confidence in my interviewing expertise and ability to*: "enjoy it (or at least look as if you do). Don't give the message that you are bored or scared. Vary your voice and facial expression" (Robson 2002:231)*

This segues with the theme of emotional labour, which emerged during the thesis. It seems that researchers and perhaps formative pedagogues share similar skill development needs – to manage their own emotional responses.

During the piloting phase, a system, the technique of using the tutor-completed questionnaire as the "agenda", emerged. In addition, my own mind-mapped notes from the observations were used as a shared point of reference, source of "prompts" and support for naturalistic conversational flow. Each conversation was recorded and mind mapped. The transcript was confirmed as accurate by all tutors.

RENDERING OBSERVATION AS DATA TEXTUAL ANALYSIS AND TRIANGULATION

"Saying is one thing; doing is another" (Robson 2002:310)

Direct observation was included to enhance understanding of the contexts, emotional cultures and manifestations of formative pedagogy. (Cohen et al. 2000:305) reminded us that the researcher "*agendas of issues*" influence observations and inferences so steps were taken to render the data transparent. Data were gathered along four dimensions - the physical; the human; the programme and the interactional setting using a loosely-structured approach informed by Le Compte and Preissle's guidelines (ibid p312). Mind mapping (sample Appendix 4:3) was used to record the observation and transposed soon after. Transcripts formed part of the data set subjected to multiple readings for narrative analysis and contributed highly valid information for analytic induction and tracking the working hypothesis[5] (Robson 2002:322).

For ethnographers, classrooms are complex social environments (Hitchcock and Hughes 1995:237) comprising a series of communication events influenced by the cultural and social processes or norms of each case (ibid 1995:242). Categories of meanings, events and exchanges are not always apparent and feelings difficult to observe. As researcher I

noted and recorded personal responses with analytic brackets to denote subjective evaluation of behaviours possibly signalling feelings by observees, for example, laughter. Reference to my mind-maps enabled direct comparison between specific events, witnessed by myself researcher and tutor, throughout the emergent dialogue. This provided immediate triangulation between verbal claims and observed events, and added depth to the analysis of open comments in questionnaires.

ETHICAL CONSIDERATIONS

An ethical position was maintained throughout by reference to "*ethical principles in action research*" (Robson 1993:33-35) and BERA Guidelines 2004. In addition, ethical dimensions of narrative and heuristic interpretation referenced the work of naturalistic inquirers, such as Chase (2000), Hiles (2002) and Hones (1997). Ethical approval was granted by both the supervising HEI (Institute of Education) and from the Medical school where lectures were observed. In accordance with tradition, concern was paid to informed consent; privacy and doing no harm (Fontana and Frey, 2000:662).

Informed consent

Participation was voluntary, with a clear outline of the purpose and approach of the study integral to each questionnaire. Each participant provided written consent on the questionnaire. All GP trainees and 5Rhythms class members had been consulted by tutors before my arrival (for example see appendix 4:4 open letter to 5Rhythms class.) Permission was re-negotiated at the start of each 5Rhythms session and the teacher retained the right to ask for observation to cease at any point. Undergraduate medical students were informed of my presence and invited to complete the questionnaire whilst no discussion regarding my presence was observed at the Kungfu Classes.

Western concepts of individualised consent as core to ethical approval significantly contrast with Chinese collectivist hierarchical traditions (Hwang 1987, Pann 2000). In line with Shaolin hierarchical culture, Shifu-A, in the pilot study, stated he would "instruct *them to complete forms and they must do what he says*" (field-notes of initial meeting). Seeking individual consent (in line with ethical approval) might have "*powerfully disturbed"* the phenomenon of interest and risked causing offence to Shifu.[5] Asserting Western research ideals would have risked breaking the social etiquette rules

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[5] From consultation with Professor Robert Cowen 2009

of Renqing, the exchange of favours between colleagues (Hwang 1987:952) and quanxi, the projection of self-image and impression management (Hwang 1987), both part of Chinese ethical discourses. Shifu, the participant in case study B, allowed student participants choice. This diluted the immediate ethical conundrum, although the overall issue of culturally different priorities, when constructing international research, remained.

Right to privacy

Questionnaires reassured participants that data would be anonomysed (see appendix 4:2) and any dilemmas relating to the context details, which might inadvertently have provided clues to tutor or learner identity would be handled sensitively at the writing stage. Anonymity of the respondents remained paramount.

Protection from harm

 The aim of this study was not to assert new truths but to contribute to on-going discourses about formative assessment in AEHD.

EMPATHETIC METHOD AND APPRECIATIVE INQUIRY

As many participants were not direct stakeholders in the outcomes, it was important to convey the purpose of the study and offer reassurance of non-evaluative intentions. In keeping with my pedagogic approaches and professional interests, the research stance was described to institutions and participants broadly as appreciative inquiry (AI). Appreciative inquiry focuses on what is working. "*The principle of positivity has… become increasingly aligned with this form of inquiry such that it is required to focus on what works well, peak moments and achievements, with the aim of enhancing the life affirming that exists in the organization (Fitzgerald and Oliver 2010)*

Adopting an empathetic stance towards gathering data from the interviewee's subjective realm by grappling "*with the complexity of subjectivity rather than reducing it to its component parts*" (Josselson and Lieblich, 2001:82) was deemed appropriate for conveying an intention of "learning from" rather than evaluating performance. This approach seemed fit for exploration of risky realms of feelings, emotions, relationship and caring, whilst doing no harm. As a researcher, I sought to explore "*what is going on?*" a frequent entry point for ethnographic research (Neville, 1994:58).

Adopting an Appreciative Inquiry (AI) paradigm (Ludema and Cooperrider, 2001), to identify relational factors working in each study reduced risks of negative consequences for participants. Volunteer tutors were informed of the intention to contribute new perspectives to discourses on, for example, formative assessment, international and intercultural models of adult learning and medical education. Tutors were given an opportunity to read and confirm transcripts as accurate.

OPERATIONALIZING: THE NUTS AND BOLTS

PILOTING

All methods benefitted from piloting and iterative development in parallel with the literature review (Light et al., 1990:13). Piloting, of methods, was formal and informal for example structured activities and opportunist conversations used to refine introductory statements and questions through feedback from neutral individuals (Gillam, 2000). Observation was piloted with GPs and 5Rhythms, interviews were piloted with the 5Rhythms teacher and the Shifu. No piloting of the instruments or methods took place within the very familiar undergraduate setting. Piloting (of observation in a large lecture theatre) might have proved valuable as, with hindsight I realised, I could have been better positioned centrally in order to observe the large group of learners. Piloting helped avoid "*inadequacies*" in the design and delivery of the study (Foddy, 1993:10), aided self-preparation and organisation, and established relationships and contingencies (Robson, 1993:301). It identified risks of missing vital issues; facilitated meetings with sub-samples that illuminated appropriate approaches and language (Brakewell, 2000:234); and allowed testing and refining questions in familiar and less familiar environments (Rolfe, 2001:225).

Piloting interviews served to "*sensitise the interviewer*" (See appendix 4:5) to norms in respondents' communities and shaped my interviewing and analytic style (Foddy, 1993:10) especially in relation to Shaolin tradition. Table 4:3 summarises the range and rationale for piloting activities undertaken.

ADMINISTRATION OF QUESTIONNAIRES

Questionnaires were available for manual or electronic completion, before the conclusion of observations. They were completed by one tutor and a volunteer sample of

approximately 10 learners from the observed cohorts. Shifu (the Kungfu tutor), Kungfu students and 70% of other student respondents completed the questionnaire manually and their forms were subsequently uploaded into Survey monkey for electronic analysis of numerical results.   The other tutors and approximately 30% of students completed the questionnaire online.

The final optional comment box sought feedback on experiences of questionnaire completion. Although only a minority of students commented, the experience seemed predominantly "enjoyable", "interesting", or "helpful". Tutor responses were equally positive, suggesting the experience had stimulated reflection on ideas which had previously been tacit.

Slight problems arose with the electronic version when item 6 in case study D did not allow tutor rating and one tutor chose 13 student qualities. These issues were addressed during interviews and corrected before analysis.

UNDERTAKING OBSERVATIONS

The frequency, length of observation period and nature of entry was negotiated with each tutor in order to minimise disruption to the learning environments. Thus, a series of two one-hour lectures were observed for undergraduate study D whilst in 5Rhythms four x 45-minute sections of classes were selected at random. My position in the environment sought to balance minimal disruption or distraction with access to nonverbal exchanges, that is, seeing both teacher and student faces. Details of venues are provided in chapters 5-8.

In the more complex role, as participant observer, in the 5Rhythms class, I heeded Zeitel's warning (1984 in Robson, 2002:318) to make explicit which role I was fulfilling at any moment. It was agreed that when wearing glasses and sitting at the edge of the dance floor I would be researching. The mind-maps used to record actual behaviours and perceptions (see appendix 4:3 exemplar) were transposed into a typed record within a few days of each event. The accuracy of the transposition was also checked by the tutor respondent in each case.

CONDUCTING PROFESSIONAL CONVERSATIONS

Rather than gathering facts the purpose of professional conversations is to garner ideas and insights (Oppenheimer 1992:67). Resource constraints resulted in an elite sampling strategy (Gillam 2000:82) where interviews were conducted only with teachers, as their specialist knowledge and understandings were better aligned with the research aims. The conversational nature of the interviews was clarified and informed consent was obtained before every interview (Bell, 1999:39). The risk of semi-structured interviews being un-guided by research or theory (Adler and Ambert, 1995) was managed through shared reference to the tutor-completed questionnaire supplemented with the researcher mind-map of observations. I aimed to minimise my contribution to below 25% of the exchange, always encouraging interviewees' definitions, beliefs and ideas to emerge first before disclosing my beliefs in response to strongly expressed interviewee comments with phrases like "*I'm nodding like a mad dog / grinning like a Cheshire cat*". Follow-up questions and *probes were as non-directive as possible (*Oppenheim, 1992:113*).*

Conversations were scheduled for an hour within 24 hours of final observations. Three discussions took place in informal settings (coffee shops) and one in the reception of the Shaolin centre. Permission was granted to tape and mind-map each interview and respondents were asked to confirm the transcription within three days. Completed tutor questionnaires provided focus and shaped prompts if more directive interventions were needed, for example: *"What I want to do is to make sure that I explore some research questions – especially the nature of the relationship between educators and learners so… I'm not wanting to drive this interview but to explore your responses to the questionnaire as a kind of guide so that we both drive it." (I/D)*

Specific observations and researcher emotional responses were also used as prompts, for example, in the undergraduate case study, where the impact of the video of emphysema, led me to disclose that my father had this disease and I found it difficult and distracting to watch. I believe this disclosure enhanced rapport and opened up a valuable conversation about engagement and the emotional impact of initial encounters with illness for first year students (See appendix 4:6)

ANALYSIS OF THE DATA

> "*.. conventions of quantitative analysis require clear, explicit reporting of data procedures. That is expected so that (a) the reader will be confident of, and can verify, reported conclusions; (b) secondary analysis of the data is possible; (c) the*

study could in principle be replicated and (d) fraud or misconduct, if it exists will be more trackable" (Miles and Huberman, 1994:439).

These conventions were followed. The approach towards the qualitative data analysis was transparent, documented and retrievable with a view to rendering the interpretative stance *"confirmable and dependable" (ibid)*. The quantitative data from Likert and Rating items were managed electronically using survey monkey. Comparison was made between individual tutor scores and average learner cohort ratings.

All findings were grounded in the data sets, which remain available electronically. The analysis was both heuristic and rigorous with research instruments chosen to *"maximise construct and descriptive-contextual validity (to) assure ourselves that our interpretations connect with peoples lived experience and maximise researcher impact"* *(ibid p441).*

The data sets gathered were four sets of student questionnaires; four individual tutor questionnaires; four transcripts of tutor conversations; and four transcribed observations of 2-4 hours.

Data management had four interrelated components: data collection, reduction, display and conclusion or verification (Miles and Huberman, 1994:429). As "*lone wolf interviewers*" need clear ideas about data analysis before data gathering (ibid), the intention was always to manage a blend of inductive and deductive analytic processes and for the analysis to both inform and be informed by the iterative literature review. This required a willingness to "*shift focus according to the elements of the world*" being studied (Ambert et al., 1995:880). Analytic intentions were integrated into the conceptual framework with the intention to triangulate descriptive statistics with themes emerging from verbal responses and observed behaviours.

Construction and analysis of narrative accounts for meaning-making (Hiles, 2002) was appropriate for studying phenomena at "*the intersection of language, discourse, practical action and inference*" (Chase, 2005:655). The thematic analysis of texts, through multiple readings allowed a rebuilding of the data and reorganisation of practical knowledge without artificially separating emotional and intellectual ways of knowing (Conle, 2000:190) to illuminate new knowledge. The chapters which follow weave ideas and arguments from the literature with subjective interpretive processes valued within narrative traditions (Hones, 1997; Bruner, 2004; Chase, 2005). This adoption of a subjective-listener stance enables researchers to convey familiarity with the interviewees story so that others, similarly situated, can feel encouraged to share their story (Chase, 2005:662).

The process of open-coding, mapping and cross-referencing to develop a framework of narrative analysis themes for analysis adapted techniques from functional mapping (Mansfield and Mitchell, 1996) and the seven-stage narrative analysis process devised by Cooper and McIntyre (1993). This framework was applied at numerous stages throughout the operational phase prompting and prompted by themes emerging from the parallel literature search. One example of the iterative approach to narrative analysis was returning to questionnaire items 8 and 9 to code the intuitively developed list of qualities through the lens of reciprocity and responsiveness. Each item could then be coded in relation to emotional direction: from the tutor, towards the tutor, self and other (See appendix 4.6). This was helpful when inferring reciprocity.

Chapter 9 provides comparisons of the case studies considered together through the lens of formative pedagogy, presenting combined findings to illuminate differences in relational caring.

Part two: Four case Studies

Each case study draws on data gathered firstly through survey then observation (tutor and students), and finally semi-structured interviews with tutors. The data presented is linked most clearly to research questions one and two and ultimately aims to provide description of formative pedagogy as it occurs within each case.

Whilst each case study includes one tutor and between 9-11 students the venues and format of observations were quite distinct and are described in the case study.

No analysis between the chapters takes place at this stage but is addressed, in order to also respond to research question three, in part three of the thesis (chapters eight and nine).

GP TRAINING: THE HEART OF THE COMMUNITY

THE CONTEXT

A Certificate of Completion of Training (CCT) is the postgraduate qualification required to become a General Practitioner (GP). In the UK there were approximately 44,000 GPs, 2,972 GPs in training and approximately 5,000 accredited as GP trainers (RCGP 2009:7). Educational pathways for becoming a GP used to be managed and administered by Deaneries, which developed local systems governed by curriculum and policies (ibid). The curriculum document, "On Being a GP", (2010), was organised under six domains of competence: primary care management; person-centred care; specific GP problemsolving skills; comprehensive application; community orientation; and a holistic approach. The three essential applications are all "*aspects of care*": contextual, attitudinal and scientific. "A*wareness of self*" is an essential quality. Systemic and individual feedback is a characteristic of these policies and holistic learning processes:" Learning activities in secondary care include "*feedback from colleagues and peers using multi-source feedback tools*" (RCGP 2009:18). Furthermore, "*Responsibility for one's own learning is supported by the design of the curriculum and formative workplacebased assessment*" (ibid p30).

Following a postgraduate foundation year, doctors in this study chose a three-year long educational pathway to becoming General Practitioner Speciality Registrars (GPSPRs) undertaking placements in GP practices, hospitals and other relevant settings supported by nominated supervisors. They were also allocated group tutors, who managed rotations and a "half-day release programme" stipulated by the RCGP (ibid), which was the focus of this first case study.

GP training approaches have long mirrored best practice in adult and professional education theories and *"monitored through feedback mechanisms resulting in transparent systemic and individual change".* For example in the past, half-day release courses were criticised for offering too little choice. To deliver education in line with adult learning principles (and PMETB requirements), programme directors must offer trainees choice to plan individualised programmes according to their needs (ibid p10). Policies

recognised the importance of reflection in and on practice so that GP educators should ensure that learners are provided with opportunities to reflect through diaries, feedback, debriefing sessions and peer discussion groups (ibid p31– 32).

MY RESEARCH FINDINGS

C, the programme director and tutor in this study, demonstrated how guidance relating to learner-centred curriculum design had been understood and applied." *This year, we got them to take more initiative..... so someone is organising a management day using a creative idea based on "the Apprentice" (TV show). I've no idea how it is going to work. We will support by organising venue etc, they will manage but we will support them with the content. They are very good at organising"...(O & I).*

Two half-day observations, of this established group, took place in a Postgraduate Medical Centre. They were co-facilitated by two experienced GP trainers / programme coordinators, each responsible for half the cohort of approximately thirty GPSPRs. The relationships and views of one tutor (C) are presented, although all of the GPSPRs were invited to complete the questionnaire. Each half-day workshop was divided into two activities, Part one - presentation, the programme content and presenters were negotiated in advance and Part two – a tutor facilitated group-work session focused on issues raised by participants.

OBSERVED SESSIONS

The first session, took place in the training room of the Post graduate Centre of a large Metropolitan hospital. It was an untypical pre-Xmas quiz, followed by a social event (unobserved) was characterised by humour, fun, enjoyment and friendly, competitive banter within and between teams and with the tutor/ quizmaster. Only 20/30 participants were punctual. As others joined, they formed a team lightly allocated the name "*latecomers*". Bouts of laughter were frequent.

The quiz rounds focussed on topics such as sex and mental health, with questions such as, "*Who painted this picture / what mental illness did he have?*" (answer: Van Gogh). During a round on bestselling books, the tutor used mock authority, joking "*the tutors' version will be accepted*". As some disagreement emerged, one team remarked to another, "*now children, play nicely*". When the teams were trusted to write an answer

before the results were posted onscreen, the tutor remarked light-heartedly, *"this is a test of your professionalism"*. Despite the jovial feeling of the quiz, I noted that *"ethics and professionalism were integrated into many of the questions and there was sometimes no correct answer, requiring the group to trust the decisions of the tutors."(O)*

In response to a plea for half-marks for "*an almost correct*" answer when multiple responses might be correct, C responded *"I have a life outside writing quizzes"*. Later, someone remarked smilingly, "*now all our bonding has been destroyed*". The winners' reward was a large bag of chocolate coins, which they shared amongst everyone. The tutors used this opportunity to remind people to be punctual, saying, "*the deanery requires attendance records. We would rather not name and shame"*. Arguably, this approach promoted positive emotions through providing feedback on an identified need to improve attendance and punctuality.

At tea-break, C explained to me that *"emotions are running high" with* individuals anxiously awaiting allocation to practices, some more highly-rated than others. In the shortened Part 2, tutors shared the Part 1 agendas for next term and sought group permission for me to observe future sessions, including a peer presentation.

The spirit of camaraderie identified during observation one continued into observation two whilst trainee X made her presentation, that is, when the volunteer scribe didn't know how to notate appropriately, X responded saying, "*this is the hidden curriculum*" and, smiling, posted up a slide with the symbols necessary. X confidently presented risk factors in cases of cystic fibrosis and then sought transferability of principles to a different scenario "*next project is heart attack... what are his chances? I noted "individuals were challenging each other*" freely (O). The presenter, group and tutors worked together to identify how to solve a percentages problem. X continued responding to the questions and introduced a relevant website called "telling stories".

The tutors sat as part of the wider circle. Control of the session was largely devolved. Only once did X turn to C for guidance:

"*how are we doing for time*?" "*fine*"

(C).

X formed small groups to discuss ethical dilemmas. The participants appeared highly engaged in the activity and the whole group-debrief that followed. I noticed one remark produced non-verbal responses from the tutors who put "*hands over their mouths and look(ed) serious*" (O). In conversation I commented on this "*light touch"*, the level of

control ceded to the presenter and the responsiveness of the group. C explained she had prioritised allowing X to continue her session, as: "*part of the selection criteria, for quite competitive recruitment, includes their ability and approach to facilitation."*   (I)

In part two, three from eleven participants bid to discuss dilemmas. The group opted to explore A's issue, a patient with low blood iron, where A was "*anxious"* about the patient and his supervisor was not. C only intervened to remind them of a ground rule "*not to give advice*". Group members seemed so eager they sometimes talked over each other but quickly apologised, showing respectfulness. One peer asked A, "A*re you feeling uncomfortable*"? The body language and questions seemed to indicate group disagreement with A's supervisor. C intervened for the first time: "Y*ou don't feel comfortable? Could you use your uncomfortable feeling to be assertive with your supervisor?   A peer echoed "have you been left with anxiety"? (O)*

A asked the group, "*what would you have done"?* One replied, "*I would have called an ambulance*". When several people talked at once, C said "shhhh". As the session ended C disclosed *"I have days of terminal uncertainty; I'd ask others"*. One peer commented if "*not comfy keep digging*". Another replied *"I had learned helplessness"*. C concluded the session animatedly encouraging A in response to this difficult situation to "*discuss it with your supervisor*." Frequent reference to anxiety, comfort and uncertainty highlighted a degree of emotional relativism operating in this environment.

PROFESSIONAL CONVERSATION

At interview, I showed C my written note "*a high level of trust." adding, "you made hardly any interventions*". C responded that participants would soon become autonomous professionals, suggesting that, like her, they would need to be "*comfy on the edge*" demonstrating a degree of self-knowledge and use of role modelling.

C explained that didactic teaching risked "*boredom*" but seemed slightly annoyed by the effort required to maintain discipline and the need to remind participants each week of the ground rules, suggesting an expectation of student responsiveness and shared responsibility.

FINDINGS FROM THE QUESTIONNAIRES

The cohort of eleven trainee participants and the tutor agreed that, whilst compliance with compulsory requirements was a motivation to attend opportunities to socialise, learn and keep informed of events were also important motivators. Questionnaire responses highlighted the affective component of engagement since weekly sessions were perceived as: "*gaining information they wouldn't elsewhere, a space to reflect on their work and compare their responses to their peers. Hopefully they enjoy it and find it useful. Sometimes they can find it challenging or emotionally disturbing*". (QT)

There was a general sense that sessions provided valuable learning opportunities. "*I find them a relaxing and enjoyable part of my week where I can socialise with other trainees, discuss problems in training, issues with patients' anxieties or stresses in my life and I believe they help me in my development as a GP." (QS1)*

C hoped learners would feel "*refreshed, inspired"* but also be provided with learning transferable to their personal development and interactions with patients. The parallels between the learning and the professional processes were explicitly and transparently used for developmental purposes. In conversation, tensions between learning and assessment became more apparent. "*Their agenda begins with exams and sometimes it is competing with our agenda" (I/A).*

The hopes of GPSPRs were diverse but aligned with curriculum aims. They conveyed **hopefulness** as most included descriptors of themselves beyond the assessment point in "*future career"* and "*how to be a good GP*" (QS 8&9). They described sessions as: "*training and knowledge appropriate for GPs, comfortable situation for reflection of critical cases* (QS6). Obstacles to learning for GPSPR's were exclusively time constraints "*lack of time*" (QS2) and "*size of the curriculum*" (QS1). Some took responsibility in terms of "*time management*" (QS3). This was mirrored by the tutor view: "*tiredness, anxiety about assessments. Preoccupation with other problems.... work demands".*

In addition, C identified possible obstacles as group size or "*being outside of their comfort zone*". These might inhibit participation or *rock their faith* in their knowledge base or "*the system*". Here trust in the profession, policy frameworks, each other and the tutors were all considered relevant to pedagogy and learning.

In space for other comments one respondent highlighted growing appreciation for the structure, and the tutors and suggested a flow of learning: "*initially .. I was concerned that we didn't learn anything, that all we did was chat… played games... our focus was not on the hard core curriculum.... I have come to really appreciate these sessions for the support they provide, group learning that happens without directly being aware.*

(QS1)

There was a high level of agreement relating to the form of and confidence in feedback between the tutor and participants (see Table 5.1). Participants could indicate as many of the types of feedback as they wanted and the analysis compares tutor ratings with the percentage of the cohort of students who rated each item. Students recognised that feedback came from multiple sources with peer feedback rated almost as highly (60%) as tutor feedback to individuals (80%) and the group (70%). There was evidence of challenge, questioning and feedback at individual, group and organisational level being normalised and valued as a component of professional identity.

TABLE 5.1 THE ROLE AND TYPE OF FEEDBACK

	GP	
Confidence re quality feedback	Tutor rating :3 Mean learner rating 2.82	
	Tutor	Trainees %
Individual feedback from the lecturer	X	80%
Verbal feedback to the whole group from the lecturer	X	70%
Written feedback from lecturer	X	30%
Non-verbal or indirect feedback from the lecturer	X	30%
Feedback directly from other learners		60%
Feedback indirectly from other learners		40%
I give myself feedback		20%
No feedback		
Other		

Table 5.2 highlights considerable agreement between confidence ratings of the tutor and the mean ratings of the trainees. The two items with any significant (albeit small) difference were that C rated her helpfulness to the learners lower than the GPSPRs and they were even more confident of enjoyment than C expected.

TABLE 5.2: GP CONFIDENCE IN LEARNING AND TEACHING

Statement	GP Trainer	Mean rating of GP trainees

Achieve aims for the session	3.00	2.82
Pedagogue will help learners	4.00	2.30
Learners are motivated	3.00	2.73
Pedagogue provide helpful feedback	3.00	2.82
Learner will improve	3.00	2.90
Learners will enjoy session	4.00	2.95

*Confidence was rated from 1 (high) to 10 (low)

Table 5.3 indicates considerable agreement between the top-ten quality ratings of the combined learner cohort and the tutor.

TABLE 5.3: SUMMARY OF QUALITIES GP EDUCATORS SHOULD BRING

Quality	GP trainer View Initially rated 13	GP learners cohort rating.
Maintain discipline	X	
Knowledgeable		2nd
Teach efficiently		8th
Gives clear instructions		8th
Explains clearly		1st
Demonstrates clearly		5th
Respects learners	X	
Push learners to do better	X	
Patient and tolerant	X	6th
Notice when learners are struggling	X	3rd
Praise learners		0
Admit what don't know	X	6th
Encourage learners to learn from each other	X	3rd
Listens	X	5th
Watches	X	
Lets learners ask questions		8th

Quality	View pedagogue	View learner cohort
Cares about learner	X	6th
Corrects learner		0
Expects learner to watch		0
Asks learner questions		0
Shows learner what to do		0
Expects learner to listen	(in first completion)	
Tells stories	(in first completion)	
Takes appropriate risk	(in first completion)	

The combined cohort ratings of the agreed qualities listed explain and demonstrate clearly (1st); notice learners struggling and encourage peer learning (3rd); listening (5th); tutors admit what they don't know; patience and tolerance; and caring about learners' (6th). Student rated qualities not endorsed by C included knowledgability (2nd); teaching efficiency; clear instruction and letting learners ask questions (8th). The Four tutor-rated qualities not in GPSPR's top-ten were maintain discipline, respect learners, push learners to do better and watch. One top-ten quality, maintaining discipline seemed problematic for C who expressed slight irritation at the need to undertake this role (O & I). It was not rated highly by learners. There was considerable agreement between the questionnaire findings presented in table 5.3, observations and interview as all the tutor qualities were displayed.

Findings in table 5:4 also indicated considerable agreement between the qualities expected from learners suggesting a negotiated, explicit learning contract. Of the qualities rated by the tutor, the percentage of students choosing the same listed respecting peers (1st) respecting the pedagogue and using own knowledge & experience (2nd); peer learning (4th); listening to the pedagogue and supporting peers (6th); trusting pedagogue (9th); asking questions (10th).

TABLE 5.4: SUMMARY OF QUALITIES GP LEARNERS SHOULD BRING

Quality	View pedagogue	View learner cohort
Respect for pedagogue	X	2nd
Respect for other learners	X	1st

Trust the pedagogue	X	9th
Follow instructions		
Obey pedagogues instructions		
Listen to pedagogue		6th
Watch the pedagogue		0
Push themselves	X	
Willing to try harder	X	
Support other learners	X	6th
Learn from other learners	X	4th
Criticise other learners		
Ask pedagogue questions	X	10th
Express opinions		8th
Recognise limitations		4th
Use own experience and knowledge	X	2nd
Admit what they don't know		10th
Learner self-belief	X	
Pedagogue is expert		0
Care about pedagogue		0
Criticise pedagogue		0
Like the pedagogue		0
Other		0

Tutor-only rated items were that learners should push themselves; be willing to try harder and have self-belief. GPSPR-only items were recognise limitations (4th); listen (6th); express opinions (8th); and admit what don't know (10th) and. All of these learner qualities were witnessed during observation (O).

Noteworthy points included no-one rating liking or caring about the pedagogue nor seeing the pedagogue as "expert" and yet in the observations and interview significance of reciprocity of respect, trust and care was highly visible. Incorporating information from the questionnaire data highlighted that C felt cared for by students and rewarded by participants. The interview data showed that: *"appropriate consultation and teaching is the same thing it is the same relationship that provides a framework for things to happen. I invest a lot of energy but get lots of rewards". (I)*

The reciprocal expectations of pedagogic and learners qualities (Tables 5:3/5:4) triangulated with interview and observation findings, suggesting a coherent and negotiated contract about purpose and pedagogic approach. Relational components were evident in language and behaviours. The parallels between patient-centred care, deemed an essential component of professional GP practice (Kings fund accessed 2011), were explicitly recognised and transparently used to generate learner-centred teaching:*"…arguably the role of the doctor is becoming a conduit for information and choices. There are real parallels to how I teach"* (I)

Table 5.5 shows high reciprocity of care, trust and respect with care in both directions. The tutor held slightly lower expectations of the learners than the mean cohort rating. It seemed that both parties recognised the impact of the relational components of the learning opportunities afforded.

TABLE 5.5: GP RELATIONSHIPS & EXPECTATIONS

	GP pedagogue	Mean GP trainee
Pedagogue will **care** about learner	3.00	2.03
Learners will **care** about pedagogue	3.00	2.18
Pedagogue will **trust** learner	2.00	2.27
Learners will **trust** pedagogue	3.00	2.00
Pedagogue will **respect** learner	2.00	2.09
Learner **respect** pedagogue	3.00	2.00
Quality of relationship impacts on learning	1.00	2.20
Quality of relationship impact on group	1.00	N/A
I will care about them as a group	1.00	N/A

The level of alignment, shared understanding and negotiation signalled across all data sources suggested a highly responsive teaching and learning strategy. C described her relationship as: *"relaxed and warm but there is also a formal element as we are involved*

in their assessment" (I) and *"Seeing their development they give a lot back. I get a lot from them... lots of stroking and you're appreciated (I)*

None of the learners mentioned the formal assessment aspect when describing the relationship but used terms such as good, approachable and friendly. *"A good relationship based on trust and an appreciation for her skills and support..."*(QS1) C reported feeling anxious or uncertain mainly when *"teaching something I am less familiar with"* and her response to this would be to *"get on with it and hope for the best."* Support and feedback, for her own development, would be obtained from learners and colleagues suggesting respect for the learners as peers (albeit less experienced newcomers).

There was mutual gratitude and support afforded in this group, who used shared language, welcomed emotionality, and displayed emotional intelligence. This was inferred from the way measurements of comfortableness were sought by tutors and learners who then unpicked the emotional sources of the discomfort for example anxiety. The interview confirmed observations, the tutor constantly noticed affective components of discussions and emotional responses, her own and those of others. There was evidence suggesting emotional work and emotional labour being perceived as appropriate to the role and a satisfying factor rather than a source of stress when C explained:

> *"My skill is keeping my emotions neutral so that they can feel safe to express theirs..... When they say a patient is nice..... the huge emotional content of the work....without prior experience of what they are dealing with, they can't do it and it makes them miserable. They start to change and fall apart a bit...The relationship allows them to say 'I'm scared' then we can help to build them back up. ...sometimes we have to push hard, fast then rapport and trust is essential. Without engaging the emotional side of it not sure how we could do it.... it is the relationship that offers a framework. (I/A)*

SUMMARY

This case study highlighted alignment between professional policies and guidelines for training, between learner and tutor expectations and elements of reciprocal caring. Furthermore, there was evidence of tutor role-modelling relationship-building in ways which paralleled appropriate patient care and permitted feelings of uncertainty. The characteristics and broad descriptors included transparent and negotiated expectations, with learners encouraged to behave autonomously. Feedback was given in ways that enhanced sustainability. Use of self and peer support was also encouraged.

CHAPTER SIX CASE STUDY B:

SHAOLIN KUNG FU TEACHING FROM THE CONFIDENT HEART

"He who controls others may be powerful but he who controls himself is mightier still"

Lao Tzu

THE CONTEXT

The internationalisation of Kungfu has been quality assured by The International Federation of Shaolin Kungfu (IFSK)[7], which adheres closely to the classical system of training and self-nourishing, including four main disciplines: spiritual training; martial arts; traditional medicine, systems of health-keeping based on the best methods of Chinese therapy; and civil sciences that means the mystical history of East Asia, calligraphy, tea ceremony, Chinese philosophy, Confucianism, Taoism and Buddhism.
http://www.shaolin.ru/Server/About.htm (*accessed August 2012*)

Perceptions of pedagogical relationships and learning environments were historically shaped by Buddhist beliefs and Chinese cultural norms. Shaolin Masters followed traditional apprenticeship learning through observation, practice and experience with a few seminal theoretical texts such as "*Authentic heritage of the 72 Shaolin training methods*" (Zhong 1934). Hierarchical status influenced all social relationships in traditional Chinese, family oriented collectivism (Hwang, 1987; Li, Lam & Fu, 2000).

Chinese culture and pedagogic traditions fundamentally differed from the Western world even when considering major psychological conceptualisations. For instance, in addition

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[7]
  Demonstration by Shaolin monks and an online teaching resource available at

http://www.youtube.com/watch?v=vD75-zRluy0 http://www.youtube.com/watch?v=9wJ2VFlcUq4&feature=related

to the Big Five personality traits theory (Costa and Mcrae, 1992) of extraversion, agreeableness, conscientiousness, neuroticism, and openness to experience, Chan's (2006) study of 57 tutors and 1106 distance learning students suggested a sixth Chinese factor, Renqing: *(It is) "… a form of social exchange with a sentimental element "best translated as 'humanized obligation' (Chan 2006 p5 unpublished copy). Hwang, (1987:951), adds that "Renqing is a commonly accepted social norm regulating Chinese interpersonal relationships".* "In psychological terminology a person who is well versed in renqing is well equipped with empathy" *(Hwang, 1987:953).*

Chan illustrates Renqing in Chinese HEI contexts as tutors rendering renqing (a favour) in the form of extensions or patient explanations. They can then expect reciprocity in the form of positive evaluations from the student. This can in turn boost the tutor's reputation. Reputation and saving face, known as quanxi, is significantly important in Chinese society and may result in strategies such as active avoidance of public criticism of people or their performance. Tutors earn face for themselves and preserve face for others by influencing the way feedback is or is not offered in tutorials in order to maintain harmony (Chan 2006;5). Renqing and quanxi create a shared tacit, cultural contract covering expectations of relational ties, politeness, ethical and intercultural dilemmas regarding the projection of self-image, impression management or rules of social etiquette (Hwang 1987).

Chan (2006) maintains that the explicit role played by these relational kinship ties in Chinese ethical and educational discourses have no equivalent in Western conceptions. Perhaps there is some similarity with the, albeit more tacit professional emotional display rules? These differing conceptions of polite relational behaviours between teachers and learners might impact on experiences of Shaolin Masters encountering the attitudes of Western martial arts students, and especially on the giving and receiving of feedback.

Relationships are characterised by conflict-avoidance to maintain group equilibrium, an important factor when studying the nature of Chinese pedagogic relationships. (Bond and Hwang, 1986; Chan 2006). Whereas Western andragogical discourses emphasize self-directed individualised learning "*Chinese traditions are collectivists"* and hierarchical (Hwang 1987:951).

Discipline remains central, students must "*strictly observe instructions*" "*assimilate...mastership*" and then "*become as perfect as dragons*" (ibid p8). Shaolin teaching is characterised by certainty, for instance, aiming to break the "*bondage of emotion and aspiration"* to enable acolytes to differentiate between the truth and lies

associated with natural emotions (ibid p38). Emotions are perceived as mind toxins generating suffering through craving, hatred and delusion (Ekman et al., 2005:60). Buddhist-centred teachings such as expected compliance with the four noble truths of emptiness, ebb and flow (dialectic), impermanence and non-attainment, could run counter to the Western concepts of linear, logical rational causation (Chuang 2002:47). For Shaolin monks, historically, feelings, like the corporeal experience of physical pain, are to be overcome. Yet despite this process of de-emotionalization, Zhong's (1934) affective relationship with his master was evident in the dedication of his book in *"mournful honour"* of Miao Xing who had *"reached Nirvana"*. *"I couldn't suppress tears, my tutor was not only in command of the martial arts his humanities were also amazing" (ibid p35).* Zhong valued his Shifu's ability to motivate because, whilst teaching "*the knacks*" of combat, masters must *"light a fire in the learner and then step aside" (ibid p36).*

Arguably, the pedagogical relationship in this culture is central to development, based on obedience to and trust in the skills of masters, behaviours which were frequently demonstrated in the case study reported here. Feedback closely governed by cultural rules was almost always from the teacher to the learner. One central dilemma highlighted, in the current pilot and study, was Western Kungfu students' attraction to learning how to "*to punch and kick*" (I), whilst for Kungfu masters it remained a way of life, an integration of mind, spirit and body born from a significantly different cultural pedagogic tradition[8].

The pilot work highlighted differences in hierarchical status and cultural norms. When the young girl acting as informal receptionist / translator pointedly mentioned "PhD" whilst conveying my request, Shifu seemed impressed, smiled, nodded and added "*no problem*" in heavily accented English. Status afforded to education appeared to provide access to any open classes taught by Shifu, who allowed me to ask each student whether or not they would participate. The receptionist pointed proudly to a poster showing photographs of Shifu with his Shaolin tutor, an international film star. She proudly told of Shifu's international success as a teacher and in the film industry and how "S*hifu is very strict with students*".

[8]
http://www.youtube.com/watch?v=MYmTc-3gjlc&list=UUyKcY3yMOqhUURRozLHQsvw&index=1&feature=plcp

OBSERVATIONS

Observations took place in a combined gym, martial arts and Chinese medicine centre. Shifu had named the centre to highlight the link between peace, health and martial arts. He believed people came for that specific combination. Whilst the gym was used mainly by local people, those wanting to study martial arts travelled from further afield to study specifically with him. All observation and distribution of questionnaires took place during a four hour weekend session comprising of 3 classes. Due to summer recess half the usual attendance, of about 30 for the first class, were expected and unlike the pilot study the initial two classes observed were mixed adults and children. The final class comprised of six experienced adult males – who all became part of the sample of ten across the three groups.

SESSION 1

Chinese music played as students closely followed minimal instructions. For example, Shifu clapped and students formed two lines facing him. His verbal tone was intense and sounded aggressive to my Western ear; the music also seemed to change with the activities as the drumming grew louder. Shifu called "*faster faster*"*!* Following instructions, students were soon travelling along the length of the room with Shifu standing or sitting watching as each passed before his gaze. The complexity of the activity increased with each pass progressing from running, to twisting kicks to complex cart wheels with low spins. Despite my inexperience of martial arts, I recognised a wide range of competence in the room. There was clear demarcation between teacher and learner, and a high level of discipline and focus evident throughout the class. Class ended as Shifu called students back into a line where they followed a ritual of breathing, and lifting heels and arms. They then bowed to Shifu, who reciprocated. Everyone clapped. Between classes parents and a few of the students approached Shifu and engaged in discussions. The younger children left with parents.

SESSION 2

A few more adults joined for the second class of more experienced and higher ranked (more experienced) pupils. The instructions remained simple, following a similar

structure of warm up (running) and stretching). Shifu provided group and individual instructions, sometimes using a long Shaolin pole to point, direct and encourage. He often shouted, "c*ome on!*" or "*relax*".

After several passes, of kicking and twisting, whilst Shifu sat at one end, giving attention to each individual, the students took turns to perform short extracts from a particular martial arts sequence. I noticed how alongside the music Shifu often added to the soundscape uttering, for example "pah pah, ah phph" (see appendix 5:1). Older adults occasionally talked to each other but when the younger class members began to chat, Shifu ordered them to pay attention. The class ended with the same ritual.

An opportunistic conversation with Shifu, between sessions two and three, was recorded, transcribed and included in the data set. It highlighted clearly the cultural expectation of Kungfu in the Shaolin tradition, which requires surrender and devotion to the master (Appendix 5:1.

SESSION 3: ADVANCED CLASS

The third class comprised six men. As Shifu was in conversation, the most experienced student – H - checked "*shall I begin*"? This warm up had higher energy, running sideways and fast backwards. When Shifu joined in he immediately called out instructions and encouraged with clapping. I experienced a qualitative shift in this class, a different set of relationships seemed to be operating. Shifu had more contact with each individual. There were noticeably more demonstrations by Shifu, sometimes with H providing exemplars and illustrating how not to perform activities. I noted how this class seemed more exciting and serious.

Shifu gave simple, clear instruction: "*handstands two minutes*". For "*jumping*" over a pole, I noted he adjusted the height to ensure as individual students passed. It seemed to ensure each succeeded. Much more of the teaching and learning was in pairs. H was instructed to hand out safety equipment and both Shifu and he provided safety advice and guidance as the students travelled in pairs taking turns kicking the hand-held guards. I noted more shouting as they kicked and blocked and that the music was percussive and louder.

The pairs were encouraged to kick heavy hanging bags in a rhythm of 1, 2, 1, 2. When one student struggled the whole group called and encouraged. Then following instructions to do a series of press ups, squats and splits, they lined up and performed the ritual.

A cohort of ten students completed questionnaires following participation in one or more classes. 40% had studied a lot; 10% some and 50% a little with Shifu. Shifu indicated "*many students often*" and believed their motivation was "liking *techniques of martial art taught in the lessons*" (QT). This correlated reasonably with student motivation for attending as six mentioned personal fitness and self-defence skills; two mentioned the specific form of Shaolin Kungfu and specified a desire to "*study under a master of the calibre of Shifu*" (QS2). Two students mentioned enjoyment (QS4/6) and one added, "*I want to learn*". These comments suggested both outcome orientation and some recognition of the particular relational component of the pedagogic experience.

Shifu's hopes for the learners included five different affective or dispositional components of personal development. Most students expressed physical achievement, including "*fitness, stamina and fighting styles*" (QS1) or a specific form of Kungfu. Only two mentioned self-development or discipline. This dilemma between the intentions of Shaolin teachers and students was clearly highlighted in the interviews:

> "*A lot of people come here only just to learn fighting just to learn Kungfu. A lot of people! So if he attends this class when he learns how to play Kungfu he will notice how true Kungfu it is not so simple, is very difficult it has a lot of culture some interest something it can help your brain and help your heart not only for muscle*" …. (I)

> "*… when they learning they have lots of responsibility they not only, not just for fighting but tell them they must help themselves for opening heart and something for social and for families and meaningful things*" .(QT)

For Shifu, their failure to understand how "*serious*" and "*part of life*" the practice is in Wushu culture might inhibit their motivation for success. (QT/I). In China investment in study has an economic basis. Arguably, in assessment language, this would be of higher stakes:

> "*There are different motivations where healthcare is not free. In China people look after their body. In Britain people don't look after their body in the same way. Children like the competition in China and they know it is easier to get a job in China if you have Kungfu. You are more confident. If you succeed in kungfu, employers will recognise you are worth employing, (have self-discipline and selfesteem). Many people who study kungfu get jobs as security guards, they act as role models and they make money from film stunts*" (QT).

Only one student mentioned such dispositional aspects as "*motivation*", and "*discipline endurance*". Students perceived more practical obstacles i.e. money (QS5), injury (QS6) and competing demands "time" and "schoolwork" (QS3). A quality of **hopefulness** was evident in one student, who said nothing would get in the way. High levels of personal responsibility for success were recorded. No respondents felt obstacles were related to Shifu or peers.

Responses to item 5, regarding relationships with the teacher, included "*studentteacher*" (QS4), "*friend and assistant*" (H). One respondent commented choosing explicit transactional analysis terms: "*It is like a parent-child relationship."(QS9).* Two chose descriptive terms "*very gentle explanations but strict in some ways". (QS7)* and "respectful and able to joke with understanding" (QS9). Shifu maintained that the students were "*like family, very close". "Masters must be more important than parents,"* and require devotion and surrender. (I)

Table 6.1 outlines responses to item 10, where participants could acknowledge as many types of feedback as they wished. Shifu only acknowledged a formal teacher-dependent model. Evidently, slightly different interpretations of feedback were operating between students and Shifu. In an unrecorded passing comment, "*examinations"* were mentioned suggesting his perception was of summative judgements rather than AfL. 90% and 70% of the cohort recognized Shifu's verbal feedback to individuals and the group (respectively). Lower ratings were afforded to peer or self-feedback, in keeping with the explanations of teacher-centred learning. However, the interview and observations identified non-verbal formative feedback mechanisms in operation with little evidence of direct peer feedback, except from the most experienced student H, who identified himself "*as assistant*". *(QS4)* As observer I noticed extensive physical feedback from Shifu, for instance: "*Shifu takes a tiny child and pulls his arms into a position providing a sensory form of feedback" …"focuses on different student in turn, sometimes he doesn't even seem to nod. Others he twists and turns and demonstrates. He gives some specific feedback… "body straight" "feet together" (O)*

TABLE

6.1 KUNGFU PERCEPTIONS OF FEEDBACK

Types of feedback expected	Tutor	Individual rating as Cohort %
Individual feedback from the lecturer	X	90%
Verbal feedback to the whole group from the lecturer		70%
Written feedback from lecturer		10%
Non-verbal or indirect feedback from the lecturer		20%
Feedback directly from other learners		10%
Feedback indirectly from other learners		
I give myself feedback		30%
No feedback		
Other		

Shifu and two students identified *"a clear demonstration from the teacher" (QS1&2)* as a very important particular form of feedback. "*If you are lazy everything is difficult. Some people come tired and very lazy, everything is hard work. It is mouth to mouth feeding. They train hard and feel good. They get a sense of well-being and use their time. Some people are more difficult, they need more help and then he must show more examples."* *(I)*

Occasionally Shifu offered explanations to accompany his instructions or minimal feedback, for instance, "*run faster*" was repeated to one individual "*run faster or lose power*". (O) To the whole group he says, "*Use power, concentrate come on*"!! Shifu sometimes employed a rhetorical phrase, *"because for why?......"* when teaching and during the interview. Shifu was supremely confident of setting achievable goals, of motivating learners and that sessions would be enjoyable. His response to sentence completion I might experience / cope with anxiety or uncertainty read "*never happened before/ not applicable"* was expanded upon in the interview

> "*Our teachers spend a lot of time to study Kungfu. It is a part of their life. Kungfu always teaches us confidence. Our teachers' life's full of confidence. If students know kungfu they become confident like all teachers. ….you teach students from your heart. Just believe me from heart. "(I)*

Noticeably students' confidence in their teacher was extremely high (see Table 6.2)

How confident are you that	Shifu	Mean of learner ratings
Achieve aims for the session	1.00	1.6
Pedagogue will help learners	1.00	1.3
Learners are motivated	1.00	1.5
Pedagogue provide helpful feedback	1.00	1.6
Learner will improve	1.00	1.3
Learners will enjoy session	1.00	1.4
	Tutor 1	1.6

Confidence re quality feedback 1 = high, 10= low

Table 6.3 shows considerable agreement of the qualities that tutors should bring to the tacit learning contract. Seven out of 33 of Shifu's choices appeared in the student list. Arguably, the top student choice of "knowledgeable" could be matched to Shifu's confidence. Some overlap existed between "demonstrates clearly" and "clear instruction", which suggested even higher agreement. For example: *"Shifu started to move his neck. They all copied his movements." (O)*

Only Shifu's choice of patient and tolerant (disposition) was not matched. The three unmatched student choices were correction by teacher (3rd); notice when students are doing well (7th) and encourage peer learning (10th), which might all be explained by culturally different expectations of learning contracts. Interestingly, the lowest ranked quality in the student list was respect for learners (20% of participants). There appeared to be agreement that the direction of the relationship and responsiveness to teacher instructions were the domain of the student whilst scaffolding learning to match the current level of performance and fill gaps (formative assessment) was the responsibility of the master.

Retrospective coding of the chosen qualities showed a predominance of behavioural qualities from-the-tutor with only six affective and two mixed qualities in the lists. (See appendix 4:6). The lowest concurrences, between students, were on affective qualities. Not appearing on either list was care, kindness, praising / understanding students or allowing the students to make criticisms. Shifu's top-ten listed respect and trust in pedagogues occupied 3rd and 6th positions in the student lists. Students expressed lower expectations that their teacher would notice or care about them.

6.3 KUNGFU SUMMARY OF TOP-TEN QUALITIES PEDAGOGUES SHOULD BRING

Quality	Shifu	Kungfu learners cohort ratings
Confident	X	
Maintain discipline	X	3rd
Knowledgeable		1st
Teach efficiently	X	7th
Gives clear instructions	X	
Demonstrates clearly		5th
Suggests things learners can do	X	5th
Encourage learners	X	7th
Believes learners can achieve	X	
Respects learners	X	(20%)
Push learners to do better	X	2nd
Patient and tolerant	X	
Notice when learners are doing well		7th
Encourage learners to learn from each other		10th
Corrects learner		3rd

There was some agreement between tutor and learner cohort about the qualities students were expected to contribute to the pedagogic process. Table 6.4 shows eight of 23 of Shifu's choices appeared in the student top-ten with the exceptions being "obey the teacher" (although student first choices were "follow instructions" and "respect other learners"). Qualities valued by students (8th and 9th) but not included in Shifu's list were "*learner self-belief*" and "*teacher as expert*". Interestingly, no-one rated "express opinions; criticize other learners, care about, criticize or like the pedagogue". It seemed that expectations of relational caring were expressed differently.

Table 6.5 indicated limited relevance afforded to relationships, yet the observations and interviews suggested a degree of warmth between tutor and learners. There was some agreement on expectations of care, trust and respect as all were rated highly. The subtle differences in the direction and reciprocity of relational caring are aligned with the tacit learning contract in the teacher-centred Shaolin tradition, i.e. Shifu gave a rating of one point less on "learners caring about him" than vice versa and lowest of all that the relationship might impact on learning or the group. Shifu cared about the group and individuals but had slightly less expectation of care in return. The highest student mean ratings were, in order, respect, trust and care for Shifu, followed by Shifu respecting, caring and trusting them.

Quality	kungfu pedagogue	kungfu student
Respect for pedagogue	X	3rd
Respect for other learners	X	
Trust the pedagogue	X	6th
Follow instructions	X	1st
Obey pedagogues instructions	X	
Listen to pedagogue	X	5th
Watch the pedagogue		9th
Push themselves	X	3rd
Willing to try harder	X	1st
Support other learners	X	
Learn from other learners		
Criticize other learners		0
Ask pedagogue questions	X	9th
Express opinions		0
Learner self-belief		8th
Pedagogue is expert		9th
Care about pedagogue		0
Criticize pedagogue		0
Like the pedagogue		0
Other		0

TABLE 6.5 KUNGFU EXPECTATIONS OF THE PEDAGOGIC RELATIONSHIP

Statement	Pedagogue	Mean cohort of learners
Pedagogue will **care** about learner	1	1.9
Learners will **care** about pedagogue	2	1.5
Pedagogue will **trust** learner	1	2.3
Learners will **trust** pedagogue	1	1.3
Pedagogue will **respect** learner	1	1.70
Learner **respect** pedagogue	1	1.20
Quality of relationship impacts on learning	4	3.20
Quality of relationships impact on group	5	N/A
I will care about them as a group	1	N/A

Noteworthy differences and complexities that emerged about the nature of the pedagogic relationship across the whole data set were:"*there must be respect for the teacher…*"and "*The master is more important than the parents."(I) and "students and friends are the same. They behave as if they trust you*" (I)

Trust and respect emerged, in many forms, as core to the pedagogical relationship with both level of teacher confidence and confidence in the teacher being exceptionally high.

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It seemed trust and teacher-confidence were key elements in a pedagogical relationship where students were expected to obey without question. The approach seemed closer to the traditional Western concept of apprenticeship and mastery, where learners denounce control and accept the experienced master as expert, role model and judge.

Exploration into Shifu's lack of anxiety and supreme confidence expressed in the interview and questionnaire led to confused looks from the translator and Shifu. It seemed renxing and quanxi may not have been upheld. Merely asking the question about sources of support may have given offence.

> R… let me explain   I'm an expert but sometimes I meet someone and I'm not sure how to help them make one more step… Is there a time where you would ask your teacher to help you? (Translator says ah yes I know?)

> Shifu. Briefly our teachers always say you teach students from your heart. Just believe me from heart.

> R. always heart. so you decide from your heart….

> Shifu: always heart! (touching his heart for emphasis) (I)

The quality of the master seemed to be reflected in the capacity and performance of the student which in turn was linked to **pride** and self-esteem. For Shifu, doubt in his capacity to teach from his own heart might reflect negatively upon his master. In return for devotion, respect and trust the relationship between student and master is "*close like family*":

> "*In kungfu Chinese culture teachers and students just like father and son so this relationship is based on trust. This relationship is very important between them… when they learning they have lots of responsibility they not only not just for fighting but tell them they must help themselves for opening heart and something for social and for families and meaningful things*" Shifu (I)

Here the idea of renqing and of quanxi (Chinese rules of exchanging favours and maintaining face, explained more fully in the section on informed consent chapter four) may be of significance for formative pedagogy. That students might not take kungfu "*seriously*", be "*lazy*" or continue to *smoke*, seemed to disturb the bonds between master and learner experienced during Shifu's own traditional apprenticeship.

In response to a question designed to explore reciprocity: *R. "so if father looks after son should son look after the father?" The young female translator forcefully interrupted "No!*

Just father looks after student." Shifu brought this uncomfortable exchange to a decisive close by repeating an enigmatic "time can explain everything". (I)

This might have signalled a low level of transparency and learner control within this tradition. The student top-ten qualities included "follow instructions" but not "obey the teacher", both of which appeared in Shifu's list, possibly representing a particular example of cultural difference with emotional and or control elements. Shaolin monks would override their feelings and expect to be stretched by their teacher, whereas Western students might take account of their feelings and experiences rather than unconditionally obey a master.

> *R. Do you think it is important that the students obey and follow the tutor ?*
>
> *Shifu. Our teacher says this is a basic concept in his class. Yeah! R.*
>
> *What if they don't obey?..*
>
> *Shifu. Repeat and repeat let them become their habit.*

The importance of repetition, demonstration and role-modelling within this evidently transmission teaching was highlighted in this extract: *"Although it is easier to teach children sometimes the master has to prove he can jump very high. As a master he has to work hard, the children must watch. The master must be a role- model and "not have a big belly and just talk He must show. No beliefs. Just listen. Not talk. Just listen. They must believe and trust in martial arts." (I/O)*

Perception of fairness and justice were also key factors in this traditional pedagogy:

> *R …how do you see teaching in Britain and in other subjects…. my question if we are teaching doctors, engineers, teachers, is there more room for heart? More room for your way?*
>
> *Shifu mm… No matter what area, our teachers think students want teachers to be fair.*

Language and cultural differences, though managed by involving a young female receptionist as interpreter, were problematic. Shifu understood more English than he spoke and my recognition of his non-verbal communication, across the cultural divide seemed to please him, for instance, laughter and smiles when I noticed the nuances of his behaviours. *"Shifu laughs.. . Yes in class lots of levels. Maybe teacher uses intense voice to let them be excited, sometimes he says just near your ear, just a whisper" (I)* Respect, even for enemies, was core to these pedagogic relationships and learning environment (I). Evidently, much of the teaching and learning was implicit, for

example, although peer learning is discouraged until students are experienced, experiential learning through exchanging skills can happen when fighting. When asked why peer feedback wasn't encouraged, Shifu explained that centres and masters are judged by students and visitors, "*so the master must show*". Another rationale emerged for teacher-led sessions:

> *R. Is it important that more experienced students help less experienced students?*
>
> *Shifu: At the beginning, with this approach it is not important. The teacher must teach them. If they do not catch the basic they may hurt somebody. If using your body, must learn right, If wrong more difficult put right. In moderate or more difficult level class some people can help because teacher can always be busy.*

Some parallels with contemporary Western concepts of teaching and learning can be found embedded in traditional Shaolin pedagogy. It is possible to perceive care for individuals in the process of scaffolding in (example 1), flexible planning and studentcenteredness (example 2) and Csikzentmihalyi's (1990) flow theory (example 3).

EXAMPLE 1: SCAFFOLDING IN ACTION

R: How do you teach them so that they gain more self-esteem?

Shifu: More self-esteem, teaches students according to Chinese rules from easy to difficult. If students learn difficult class very well, helps develop self-esteem.

R: you go from easy to difficult… how you decide when to push one student hard and treat others gently.... how do you decide?

Shifu: In class there is a test to judge them about their level and their potential physical health, muscles and body strength combined.

R How do you decide when to give feedback to say "do more" "come on! do more" (mimicking his harsh tones) sometimes "very good, well done" (mimicking his gentleness)

Shifu When I give student some feedback it's according to people's personality. Some people don't care about it. Just think exciting, entertainment and exercise. Cannot recognise Chinese culture about Kung fu. Some people are different. Then I advise them to read some books and watch some films.

EXAMPLE 2: FLEXIBLE PLANNING AND STUDENT CENTEREDNESS

> *R... before the student comes do you have a plan (S:Yes yes) Is the plan based on tradition or which students come?*
>
> *Shifu: Learn always according to the students yes. Best the plan is flexible. You can combine or get rid of something, add or take away but always to advantage in students.*
>
> *R   How important is what you say to the students… I notice so many sounds, I'm interested in music, your voice, what you say. How much does that make it a good lesson? Is it important?*
>
> *…. Shifu laughs….In Class lot of levels. Maybe teacher uses intensive voice to let them be excited, sometimes he says just near your ears just a whisper.*
>
> *R…. How do you decide in your heart or in your head?*
>
> *S   When students play Kungfu very excited. Just to get not-excited students to get excited. Say 70% excited intensive voice to make other 30% percentage exciting.*

EXAMPLE 3: FLOW THEORY

> EXAMPLE 3
>
> *Shifu: insight is very beautiful. Students make one step, two steps and enjoy it. There is a feeling of nothing, it is not too slow.*
>
> *Following more clarification I realise that he seems to be describing flow theory, the beauty and pleasure of learning and development. (I)*

SUMMARY

The sample of Kungfu students appeared to choose learning with this particular Shifu. There was an acceptance that the master should be followed, respected and trusted as an expert in this traditional martial art. There was little room for uncertainty, negotiation of the learning contract or of direct feedback from peers. Despite this, there was considerable and reciprocal warmth between Shifu and his students. Much of the evidence base for Shifu as an educator was unwritten and seemingly a-theoretical. However, numerous parallels to Western concepts such as scaffolding learning and rolemodelling were evident.

THE FIVE RHYTHMS: THE PRIDE OF THE MOVING HEART

THE WIDER CONTEXT

5Rhythms is an international community of practice with numerous open classes (attendance ranging from 10 – 150) every day in London alone and residential or ongoing workshops available across the Globe. It is a personal growth, moving meditation practice, firmly located within the realms of self-directed and peer learning which is facilitated by trained teachers.[6] Mostly, the theoretical underpinnings of 5Rhythms refer to three books (1998; 1989: 2004) by Gabrielle Roth, but knowledge is co-constructed and shared verbally or through the wide range of online material posted by local practitioners as exemplified below:

"*5Rhythms is a simple, powerful movement practice available to anyone of any age, size, ability or physical limitation. There are no steps to follow or to learn and no way to do it wrong. The only requirement is a breathing body! The 5Rhythms are:*
Flowing: *fluid, continuous, grounded glide of our own movements;*
Staccato: *percussive, pulsing beat that shapes us a thousand different ways;*
Chaos*: rhythm of letting go, releasing into the catalytic wildness of our dance that can never be planned or repeated;*
Lyrical: *rhythm of trance, where the weight of self-consciousness dissolves, we lighten up and relax into our own unique movement; and*
Stillness*: rhythm of emptiness, where gentle movements rise and fall, start and end, in a field of silence".*
(Adapted from Slovenian website Dance of the rhythms)

Roth's (1989) model noted how energy moved in waves, patterns and perspectives that infuse our daily lives. Whilst working as a movement specialist she noticed and codified the 5Rhythms of flowing, staccato, chaos, lyrical and stillness into a universal pattern and therapeutic practice. Her 5Rhythms practice draws heavily on autobiographical, narrative

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[6]   Detailed   explanations   and   demonstrations   of   5Rhythms   are
        available   at http://www.gabrielleroth.com/

models of knowledge-generation which are rich in metaphor and poetry. Until recently the 5Rhythms knowledge base had emerged from a predominantly practice and an oral tradition.

She developed "the wave", a structure to offer "*maps to ecstasy*" (1998:208) and generated a language to understand and articulate experiences, sense-of-self and of belonging through this moving meditation.   Roth believed that setting people in movement, or enabling us to "*sweat your prayers*" (1989) without the burden of correct steps enabled people to heal themselves (Juhan 2003:92). A wave is a movement journey through all five rhythms lasting a minute or many hours, usually supported by music. Teachers "*hold the space*" (I) provide appropriate music, and make interventions such as inviting dancers to focus on body parts; take a partner; witness or be witnessed by others. Ritual theatre, writing or art exercises may be integrated into the process. Most sessions include a warm up, a welcome circle (used by some teachers to share an idea, a focus or invite self-reflection), and a closing circle where people briefly share experiences or ask questions.   5Rhythms language has been influenced by other "tribes" and traditions and is sometimes known as ecstatic dance because of its links with spiritual Sufi dances where movement allows dancers to disappear the self as a form of prayer and meditation.

The vocabulary, often emotional, reflects a culture of community learning with influences from other tribes and multiple, often counter-culture, sources including Eastern mysticism for example Shamanism, Native American wisdom or Sufi poetry. It is a predominantly oral; a-theoretical; interdisciplinary; primarily non-verbal and experiential practice informally influenced by personal growth theorists who linked cognition and emotions, for example Maslow, Rogers, Reich and Perls (Juhan, 2003:22-27). Links also exist between 5Rhythms and modern dance, bodywork such as the Feldenkrais (1975) method and corporeal movement teachers such as Isadora Duncan, (1927), Laban (1968), Levy (1992) and Chase (1953-64) who contributed to the lineage known as "authentic movement" (Juhan 2003:38).

By March, 2010, there were 217 teachers accredited to teach basic waves following an apprenticeship to Roth which required 500 hours of facilitated practice and 35 hours of intensive training with her Moving Centre Faculty. Roth promoted lifelong learning because training processes relied not on becoming a teacher, but on "*being a teaching*" *(I/C pilot)*. Further training is required to teach at more advanced levels.

Teachers are "*required to be original, honest, spontaneous mirrors of the 5Rhythms teachings which are rooted in movement…. 5Rhythms communities are flourishing from*

Croatia to Korea, from Maui to Manhattan, from Toronto to Tel Aviv
(http://www.gabrielleroth.com/).

Roth's belief, that to lead we need to follow, has become part of 5Rhythms teaching culture. Teachers are encouraged to make use-of-self and include themselves as learners. Speaking about one on-going group ATBGO[i], one of my most influential teachers Sue Rickards wrote:

> *"We can learn, sometimes exhilaratingly quickly, sometimes painfully slowly, to accept ourselves more, to see ourselves and one another with increasing respect and pleasure. Many of us were born into a group, mostly were in school in a group, often work or live in a group, and sometimes feel isolated from any group – so we get myriad opportunities to practice dancing with all our ordinariness and extraordinariness, being challenged and supported by the tribe that we create."*
> *(http://www.acalltodance.com/ accessed August 2012)*

When dancing the 5Rhythms, students and teachers are encouraged to pay attention to three relationships: with themselves, with others and with the group as a whole. (Juhan 2003:128). All teachers develop the art of using music to support the movement to "*become sacred DJs*" (ibid p149) choosing different kinds of music as doorways into each rhythm and the emotional landscapes mapped by Roth (1998).

Arguably, despite a limited 5Rhythms's evidence-base, Roth's framework has intuitively drawn together multidisciplinary wisdom offering practitioners general strategies for coping with the slings and arrows of complex lives. 5Rhythms fits well with Willis's 1998 ideas of the phenomenology or epistemologies of practice to balance the dominance of propositional knowledge in H&PE. 5Rhythms stretches intuition and imagination, awakens intuitive intelligence and artistic sensibilities, and is used by many people worldwide as a powerful tool for accessing creativity and effecting personal transformational change *(Hogya 2004).*

To capture the unwritten but shared epistemology shaping 5Rhythms, three exemplars from the transcribed pilot (See Appendix 4:5) professional conversation, with an experienced teacher (P) are offered.

R. How do you do that without feedback? (direct verbal feedback to individuals is rare in five rhythms)

P … I now tend to go up to people (during breaks or lunchtime). Not to say you are not up to scratch but because there seems to be a level of anxiety, resistance to process, spoken, heard or said. I say "hello how's your day been?" **I cultivate a personal relationship to untangle and develop trust and a sense of relationship.**

R.   Can you play out what you mean by "relationship"?

P Levels at which we work can be profound. There's a choice to step into a student-teacher relationship.…, a willingness to be really taught. That requires a very personal opening in the psyche, therefore a strong level of trust in the teacher is needed. It's not personal, but transpersonal – a receptive soul in the "being" which draws teaching through from behind the teacher. There is a quality of trust, like a level of intimacy with a lover. I've never said this before but it is soul to soul, overwhelming. I'd say it is not teaching skills but a quality of presence. Everything at the technical level is actually about embodied absence - stepping out of the way…. …. I realise the relational level is…. spirit to spirit… is beyond the personal. It doesn't matter if the student doesn't like me, but they do need to trust me as the delivery mechanism.

Another exchange later in the conversation raised a profound question which shaped my researcher lens throughout the data gathering and analysis phase: *P. Perhaps the relationship between teacher and student is less important. Gabrielle (Roth) says the rhythms are the real teacher (not the human one). It is an important experience without that 1:1.*

R. I **feel** *you really care for me.* **I know** *I am one of a group but I want you to notice me when necessary. Perhaps the sense of 1:1 relationship is more important for the learner?*
P. Interesting. Perhaps it is a flow, a river flows downstream towards the student upstream to the collective ground…here is an example. For almost every week for nine years one woman has attended my open and on-going groups. I hardly ever give her

attention. Every now and then I notice that I am not noticing her. She is loyal and devoted. R. I wonder what you think I might find in common from 5Rhythms for teacher/ student relationships in 3 different case studies. P. Clarity about:

- *What they are attempting to do together;*
- *Time;*
- *Creating mutual respect between not just teacher and group but between group members;*
- *Turning up… consistency;*
- *Being there; and*
- *Having faith in human kindness…*

EXAMPLE 3 CREATING SPACES FOR PERSONAL LEARNING

One conversation highlighted both the facilitative role of the 5Rhythms teacher and the considerable use of metaphor as P described teaching 5Rhythms.

P: "it's like slipping treats to a guard dog to get access to the king. In under the radar until something else speaks directly to the self."

This comment highlighted how 5Rhythms teachers rarely intervene, provide direct feedback to individuals but appear to be constantly witnessing and monitoring, referred to within the community as "*holding the space*."(I/C)   As a dancer I recognise the experience of being held by the non-verbal cues from teacher behaviours towards myself and others and the sensitive management of whole group process. 5Rhythms teachers are taught to notice and use their insight to feedback, not to individuals, but to the group as a whole.

THE 5RHYTHMS TEACHER-LEARNER RELATIONSHIP

Roth, who conceived the 5Rhythms whilst working as a movement therapist, considered her students, whether children in a large playground or small groups of elders in residential care, as her "Zen Masters", illustrating her belief in lifelong learning and reciprocity

between students and teachers. Discussions with, and website content written by, 5Rhythms teachers consistently capture the relationship between the 5Rhythms philosophy and much of the literature on best practice in formative assessment (Jones 2007).

"A teacher is somebody committed to being real and accountable and to providing the space, permission and guidance for you to do the same" (Roth 1998). 5Rhythms teachers frequently practise as peers at other classes. In other words, the boundary between teacher and learner remains fluid: "*To all our students past, present and future, we say a big thank you for teaching us how to teach and for keeping our feet firmly on the ground! You are all a deep inspiration for our work*."
(http://schoolofmovementmedicine.com/teachers.php accessed August 2012)

5Rhythms highlights a unique form of feedback where teachers act predominantly as facilitators, creating emotionally safe landscapes for authentic movement and learning from experience. They are conduits for learning rather than experts. They invite learners to identify "gaps" in their own personal development and transfer learning from the experience of moving to other aspects of their lives. Uncertainty is familiar and welcomed within the 5Rhythms community, as shown by this advertisement for a workshop entitled "Relax with uncertainty": "*The 5 Rhythms® movement practice prepares us to find the ground under our feet in turbulent times, to move with intuition and agility in a field of chaos, and to remember the stillness that resides inside of us."*
(http://www.nitherapy.net/ training-courses/5-rhythms-workshop accessed October 2011)

OBSERVATIONS

The weekly class took place in a large wooden-floored hall and an average of 18 dancers attended each observed session. Nine dancers, with a range of experience, completed the questionnaire before one of the three sessions. The sample included another 5Rhythms teacher, participating as a peer. Each class consisted of a warm-up period during which dancers would arrive in their own way, some stretching and finding their own space whilst others began moving to the music sometimes encountering each other and dancing a greeting (there is a convention of not speaking whilst in the space).

Observation slots were negotiated in the opening circle (approximately 40 minutes into the two and half hour class). It was agreed I would participate as a dancer (to communicate trustworthiness and sensitivity to the process) and to step off the floor into more neutral researcher role (signified by writing and wearing glasses). On three occasions I moved to

the edge of the room for approximately 45 minutes to develop a mind-map of my observations. I was able to observe the whole group and the teacher who would move from behind the music system either to make suggestions through the microphone or to dance in the space for a few minutes. On one occasion, when circumstances determined I could not observe, I sat and wrote a minute paper and poem (see appendix 4:1).

Findings from the questionnaire

B, the teacher, had danced with many of the participants often (QT). Of the sample 33.3% had studied a lot; 44.4% some and 11.1% a little or for the first time with B. (QS). Two comments were added to Question 3, both relating to having danced with B before but not at this class.

B suggested multiple motivations for attendance: liking to move; sense of community; knowing they could "*safely turn up*" and see what happens through movement; her teaching style; and choice of music. Dancers too offered multiple reasons for coming, often using emotive words such as "like" or "love…. the space.. .. *to dance", "I love B"* (QS1) and "*I love 5Rhythms and B is my favourite teacher"* (QS3) Respect for peers also emerged along with one comment on physical wellbeing;

"*I know it is good for my body*" (QS7) and "*because other people I respect go to this class*" (QS4).

The diversity of reasons for attendance found across the sample was captured within the coding of one single response below as (R4, P3, S2, D2 & D4.) …"*I wanted to keep dancing… I chose B's group because I have always liked her clown-like / staccato energy and have felt a connection with her when I have danced at her various workshops. I trust she will guide with integrity" (QS2)* This quote demonstrated the use of shared liminal language. Staccato refers to the second rhythm, other similar examples appear throughout the data, for example, describing the relationship with B "*light, lyrical and playful*". (QS2)

Interestingly B's suggestion of "*chattering heads*" as an obstacle for learners was echoed by two students "*distractions and internal dialogues*" (QS8). B identified her own emotional state as a likely obstacle to their learning She experiences occasional weariness with the practice "*been doing it for ages*" or going onto *"auto-pilot"* and not remaining aware of the people in the space. None of the sample identified B's behaviour as a possible obstacle, with most referring to aspects of themselves, including not taking responsibility, trying too hard, their own ego "*comparing my dancing with others*".(QS6)

The teachers' intentions were clearly aligned with the hopes of the sample as the focus was on enabling them to meet their own needs, which were again diverse. *"Chance to drop into their hearts, bodies, minds and spirits …comfortable or uncomfortable… leave feeling, yes, I am alive. It is worth it… feeling of community touched somewhere about this human being business (QT)".*

The following quote again illustrates the diversity and complexity of responses (having five codes) and the theme of learner empowerment and high-value control throughout this case study. Individuals consistently challenged and questioned the language and concepts of the research.

> *"Learning isn't particularly on the agenda I hope to experience being present , to enjoy the movement of my body moving.. expressing... allowing me to be more present to myself and others to have the experience that however I am is ok. I am looking to learn anything about the 5Rhythms that allows me a way of using dance more deeply and with more understanding … a tall order!" (QS1)*

Similarly B felt comfortable challenging the need and rationale for my recording our interview (I).

Table 7:1 is consistent with the philosophy outlined by B because as tutor she encapsulated the form of feedback by simply ticking "other". The following extract illustrates the use of indirect feedback in 5Rhythms

> *"R. You notice the individuals but comment to the whole group?*
>
> *B. Yes! What I see effects what I say. I use life-saving phrases like breathe, release your feet, soften your belly.*
>
> *R. What is your view on feedback, where does it fit in with your relationships with those of us who pay to come to your class?*
>
> *B. I remind. I remind you to breathe, simple things like breathing. I don't give individual feedback but to the group…. constant. I remind it is a moving meditation practice. And yes, I remind people approaching chaos about safety … keep your "eyes open" or even be quite hard "wake up people". But usually I use humour or point out you could hurt someone. It is unlikely I would single someone out by saying for example Linda you are not breathing – I would offer it to the whole group… breathe! (I/O)"*

Table 7:1 shows the highest mean percentages for types of feedback identified by the cohort of dancers were self, peer and whole group. There seems to be a shared

contract as learner expectations of formal, direct and peer feedback were aligned with the practice. For example:

"I would love individual feedback from the teacher but don't expect it." (QS1)

"Only expect feedback from the teacher if I asked for it" (QS2)

Don't expect feedback from anyone but find it useful when I do get feedback from student or teacher (QS3)

"Guided self-inquiry" (QS4)

TABLE 7.1 5RHYTHMS PERCEPTIONS OF FEEDBACK

The role and type of feedback	5Rhythms Teacher	% Learner ratings
Individual feedback from the teacher		11.1%
Verbal feedback to the whole group from the teacher		55.6%
Written feedback from teacher		
Non-verbal or indirect feedback from the teacher		55.6%
Feedback directly from other learners		11.1%
Feedback indirectly from other learners		66.7%
I give myself feedback		77.6%
No feedback		22.2
Other	X	11.1

The observation and interview demonstrated how at times the teacher joined the group, arguably adopting an experienced peer mode (offering feedback indirect / non verbal feedback by modelling). This could account for the spread of cohort scores Vs tutor's single tick.

Table 7.2 explores the levels of confidence expected of and by the tutor. All ratings were relatively high the lowest being a 5, which was attributed to personal issues rather than doubt in the teacher. There was a fairly high relationship between % dancer (QS) and B's ratings. Dancers' faith that the teacher would help them was one point more confident than B.

TABLE 7.2 5RHYTHMS CONFIDENCE

Confidence	teacher	Mean rating dancer cohort
Achieve aims for the session	3.00	3.43
Pedagogue will help learners	3.00	2.00
Learners are motivated	4.00	3.33
Pedagogue provides helpful feedback	3.00	4.00
Learner will improve	3.00	4.00
Learners will enjoy session	3.00	3.50

Where confidence rating of 1 is high and 10 is low

All tutor and mean dancer ratings were within 1 point of each other, suggesting a high level of agreement. That the tutor rating, (3), for feedback was slightly higher than the mean cohort rating, (4) may be explained by the unique meaning of feedback discussed previously. Eight respondents commented, mostly by questioning the meaning and relevance of the terminology, for example *"performance"*, *"feedback"*, or of the use of a questionnaire in a 5Rhythms community. 5Rhythms language is relatively specific to practice, for instance enjoyment is not always an aim. Process rather than learning or outcomes may be the goal. Arguably, learner identification of obstacles as relating to their own issues might suggest confidence scores included their own contribution and abilities to make use of the practice rather than the skills, capabilities of, or indeed the relationship with the tutor.

The extract below highlights many facets of 5Rhythms practice, where the tutor works with the group to create space for self-directed experiential learning.

> *B. I make it clear this is a moving meditation. It is about being present. I set an intention for holding and it is in part about being ordinary. I don't say much. R. Intention is the key then?*
>
> *B Well, it certainly creates something – what are you needing tonight? What I'm interested in is about what stops us being present, each in their own way.*

Table 7.3 illustrates considerable agreement about the qualities expected of teachers although only five out of 33 of B's choices aligned with the dancers' top-ten. The student list included five observable and perceivable behaviours and dispositions, watching and allowing dancers to ask questions (2nd) and kindness, listening & clear demonstration (7th). All of which were evident in other data sources.(I /O) Two of B's top-ten were the behaviours, "suggest" and "encourage", no "expected behaviours", which also points towards invitation rather than instruction, despite "clear instructions" being in both toptens'. Indeed, the item "shows students what to do" generated five comments which illustrate the principle *"instructions are guidelines not orders"* (QS4). This is confirmed by

the gentle invitational tone of B's guidance:- "*…breathing. Feed the flow, feed your feet with breath*" (O2); "*follow your hips, find definition in the shape*. "*Good, from inside out*" (02) and "*lots of breath, take it in let it out*" (*I notice that no one is looking at B*) (01).

TABLE 7.3 5RHYTHMS SUMMARY OF TOP-TEN RELATIONAL PEDAGOGIC QUALITIES

Quality	Pedagogue	Dancer cohort rating.
Gives clear instructions	X	2nd
Suggests things learners can do	X	
Encourage learners	X	
Believes learners can achieve	X	
Respects learners	X	5th
Is kind		7th
Notice when learners are struggling	X	5th
Notice when learners are doing well	X	0
Praise learners	X	0
Admit what don't know	X	7th
Encourage learners to learn from each other	X	1st
Listens		7th
Watches		2nd
Lets learners ask questions		2nd
Explains clearly		5th
Demonstrates clearly		7th
Criticises learner		0
Asks learner questions		0
Shows learner what to do		0 5 comments

There appeared to be an implicit contract that fit both dancer and teacher hopes, needs and expectations. For example "*creative, willing to take risks…make mistakes… trust intuition.*" (QS1) and "*I wouldn't expect a teacher to give criticism or judgement*" (QS2)

The following highlights alignment between teacher explanation, observed behaviours and links to the psychotherapeutic concept of self, transference, poetry and reflective practice implicit within 5Rhythms.

> *R. I'm curious about how you make decisions (shows set of scribbled questions) When / why you dance into the group; tell to take/ change partners; say things like "yeah, that's great"*

> *B. I always decide on a clear theme either conceptual or physical for example letting go as a concept or "feet". I like to create a landscape around the theme.*

> *Earlier I used to plan exercises more but now I just trust my instinct and the energy in the group. My job is to be present.*

> *R How do you pick up that energy?*

> *B: I pick up and offer energy by moving with the group around the floor, a turn around the floor and "Ahhh" - so they are not breathing enough. I read things physically. I want to eliminate the teacher here and student there thing (uses hands to illustrate hierarchy). I am offering guidelines. I am a dancer, too. (I)*

B frequently moved into the space to dance offering encouraging feedback to the group "*yes, yeah" "haaah*" - sighing into the microphone". Notably, whilst there was agreement that teachers should notice the struggling learner (QS5) B also ticked notice doing well and praise – here these judgements are also translated into group feedback for instance "*beautiful" (O)*

Even closer relationships were found for the qualities students were expected to bring (see Table 7.4). Of the 23 options seven were chosen by B and the dancers. Not on the dancers' list were two behaviours and a disposition, "ask teacher questions," "express opinions" and "admit what don't know". Observations, questionnaire and personal experience suggest these may be taken for granted assumptions based on responses elsewhere suggesting other qualities for example "listening to oneself", "*willingness to be present*" (QS1) being "*vulnerable*" (QS5) and "*outside of comfort zone*" (QS3). Qualities rated as important by dancers-only were "listen, watch and can-do attitude".

7.4 5Rhythms Summary Top-ten qualities students should bring

Quality	5Rhythms pedagogue	5Rhythms student cohort
Respect for pedagogue	X	4th
Respect for other learners	X	2nd
Trust the pedagogue	X	4th
Support other learners	X	4th
Learn from other learners	X	1st
Recognize limitations	X	4th
Use own experience and knowledge	X	3rd
Admit what they don't know	X	
Ask pedagogue questions	X	
Express opinions	X	
Listen to pedagogue		4th
Watch the pedagogue		8th
Have self-belief (can do attitude)		10th

It's noteworthy that neither tutor nor learners rated "liking," "caring for" or "trusting the teacher", which contrasted markedly with narrative comments and ratings for questionnaire item 7. Arguably, this might reflect on these qualities having already emerged in previous items or of trust being in the practice rather than the individual teacher but it could be an under-estimation of the significance of the implicit emotional dimensions of the pedagogic relationship.

Table 7.5 identifies high levels of reciprocal caring. All B's responses were above 3. Care and respect for the dancers was highest although observation and interview suggested that this was of the learners as a group. The lowest numerical rating (3) (highest level of caring) was awarded for the teacher trusting the learner possibly reflecting some level of responsibility for safety in the space. For B it was

> "important that I take an interest in everyone. I feel tender towards them. I care… but hmmm… I keep having to hand it back to them it is their responsibility…. you are the only person who knows… My job is to offer support. I can't take decisions. They are your emotions. I can't offer emotional support to everyone. I can offer 5Rhythms support and extend where they go in the present."

The reciprocity of care and respect (rating of 1 made by seven dancers showing care <u>from</u> the teacher and by six respondents <u>for</u> the teacher) is high. The biggest difference was that B scored 1 on the impact of the relationship on learning while the dancers' mean rating was 3.5. This may be linked to differences between teacher-individual Vs teacher-group relationships.

TABLE 7.5: 5RHYTHMS EXPECTATIONS OF RELATIONSHIPS

	5Rhythms teacher	Mean Dancer cohort
Pedagogue will **care** about learner	1	1.67
Learners will **care** about pedagogue	2	1.89
Pedagogue will **trust** learner	3	1.78
Learners will **trust** pedagogue	2	1.44
Pedagogue will **respect** learner	1	1.33
Learner **respect** pedagogue	2	1.44
Quality of relationship impacts on learning	1	3.44
Quality of relationship impact on group	1	
I will care about them as a group	1	

Where expectation rating of 1 is high and 10 is low

In response to item 5 describing their pedagogic relationship four dancers wrote friend(ly). Three mentioned trust whilst three used descriptors: *"Warm, sparky, teasing, exploratory,*

trusting, a bit in awe, respect and confident" (QS1);.She is fabulous (QS4) and Informed and brand new (QS6).

Noteworthy is a comment that highlighted the invitation to mindfulness and selfawareness possibly identifying one way in which reflection or self-feedback is encouraged: *"often there is an inquiry from B at the beginning to notice where your energy in your body is and check again at the end – so guided self-enquiry" (QS4)*

The conversation with B lead to discussion of the language of shared meaning, confirmed the influence of Buddhist ideas and echoed Macintyre's (1999) conception of a "*safe skin*" for developing educators sense-of-self.

> *R. how do you suggest I could explain to academic readers the essence of holding the space?*
>
> *B Create a safe space for people to do their work. They are vulnerable, being seen and seeing… important to acknowledge the uncomfortable to see what might happen. It is the Zen paradox of no expectation and expect everything. Also I make the room nice, create an installation and no one can join in after 8 pm. If you walked in at four it is a sports hall, dirty with … fluorescent lights. I change that, change the lighting use ritual, smudge and intention.*
>
> *This is not a free form. It takes discipline. ….I feel protective of people there. If someone is just tired and watching, sitting out on the edge it is draining energy. I might talk to the person because it can feel like they are observing … this is a moving meditation you wouldn't just watch someone doing yoga. There is freedom to speak to make it safe. I doff my cap to everyone. I want to make it safe. People are courageous and tender. I feel like a lioness." (I)*

Closely aligned with Roths' expectations of teachers, B hopes learners know "*I care for them and am doing my best for them, along with them, that the teacher student relationship is a circular dynamic where we feed and learn from each other" (I)*

B manages her own anxiety by trusting intuition, dealing with the situation directly, for instance, *"asking a question approaching a person"*. Feedback and support is provided by peers, a partner (also a teacher) and an annual meeting of 5Rhythm teachers.

SUMMARY

5Rhythms classes were characterised by a contract which assumed learners to be self aware, self-directed and considerable levels of reciprocal trust and respect between learners, teachers and inter-peer. There was evidence of high expectations and promotion of emotional intelligence plus acceptance of the inter-relationship between physical, cognitive and emotion experiences. Both 5rhythms teachers interviewed indicated realistic expectations of their capacity to care thus avoiding the stress of many double-duties. Their focus was on caring for the group and "holding the space" – creating the optimal environment for individual learning to take place. The form of feedback was unique as often couched as an invitation for peer or self-assessment or shown through teacher role-modelling a range of authentic movement.

UNDERGRADUATE RESPIRATION, BREATHING, HEARTS AND THE ART OF LECTURING

> *"Variations in teaching are commonly subsumed under the two broad 'orientations' to teaching ... "learning facilitation" and "knowledge transmission". Various studies, however, also identified inconsistencies between teachers' conceptions of teaching and their reported teaching practices. Possible explanations for this phenomenon include teachers' frustration by contextual constraints and teachers' lack of training or staff development to enable them to "operationalize their conceptions of teaching in appropriate teaching strategies".*

(Norton et al. 2005:1)

THE CONTEXT

Policies, such as "Tomorrow's Doctors" (2009), have attempted to change the traditional technocratic models that have dominated medical education (Bines and Watson 1992). Medical school curricula are in a period of educational transition characterized by a shift towards transformative learning. There has been Deanery investment in faculty development and funding of post graduate teaching certificates for example East of England Deanery 2012, but some worry that "*top down approaches to changing culture and relational patterns in organizations often disappoint*" (Cottingham et al. 2008:715). Changing intentions may result from contextual factors rather than renewed underlying conceptions of teaching (Norton et al. 2005:1) suggesting a need to support change in teachers' beliefs about teaching as well as compliance with teaching intentions derived from policy.

Personal experiences of teaching postgraduate medical education and leadership programmes suggest that traces of the hierarchical culture, where teaching by humiliation used to be a regular occurrence, are now diminishing. More recently *"evidence suggests, even today, that there is still teaching by humiliation and sarcasm, teaching that is variable and unpredictable and poor supervision and assessment, with little feedback." (Lake 2004:415)*

There have been attempts to bring about change. For instance, Cottingham's (2008) emergent design methodology adopted an appreciative inquiry approach at an Indiana University to align formal competency-based training with an informal or hidden curriculum (ibid). The authors were mindful of the relational patterns within their institution and sought to support initiatives and positive storied accounts of what made a difference to culture and practice.

Like many HEI lecturers, the teacher respondent in this case study had achieved a post graduate certificate, demonstrated a desire to facilitate learning rather than merely transmit Knowledge and reports a range of feelings associated with the role.

SPECIFIC LECTURES

This case study took place at a banked lecture theatre in a UK medical school. Approximately two hundred first year medical students attended the observed series of lectures on respiratory control of breathing as part of their pre-clinical, Year 1, education. Although data on age, gender and ethnicity were not gathered, institutional demographic data and researcher observation suggested that the audience was ethnically diverse, and comprised over 50% female students in their early twenties. The students and tutor had had little prior contact. Both one-hour respiration lectures, part of the physiology curriculum, took place in a banked theatre fitted with multimedia and were followed by (unobserved) related practical sessions.

The lecture series had been modified in an attempt to link pre-clinical science education to the learning experiences in the clinical settings that would follow (I). M explained he gave these lectures because of personal research interests, because his enthusiasm could engage the students and because it was:

> *Stuff students really find interesting but don't have much time for. My lecture contributes to that, for example, breathlessness. When I show that video of the patient who is extremely breathless I think that is an eye opener for the students. Because they usually have to wait until they are in their clinical year before they get the shock of seeing a patient who is desperate for air. (I)*

Informal discussions with M provided insight into his perceptions of how students evaluate his performance and how he adapted his lectures in response to their approaches to learning. He believes lecturing to be an art and that students learn informally from lectures, i.e. based on encounters with other students. In later years when acting as problem-based learning tutor, he found they differentiate between *"good and bad*

lectures", claim to forget bad, pointless lectures; take transferable skills from skilful presentations and discussions; enjoy and mimic effective presenters; and learn what to avoid by falling asleep in didactic lectures. M appeared to express some ambivalence towards traditional medical education: "*there is a grey area. We all come from that tradition. We learned. It can't all be bad (I).*

With such large groups discipline was identified as an obstacle to learning. "*Many course leaders complain*" (I) and students too commented about "t*he talking that goes on in lectures" (QS6).* This perceived lack of respect and attention seemed to generate "*disappointed*" tutors, who had *to "grapple with discipline*" in the faculty.

M empathised with learners: "*These are first years, still coming to terms with the speed they are learning… Many of them are strategic learners."(I)* He added that lectures weren't compulsory:

> *"but if they attend they should be considerate. In the first lecture of this series there was lots of chattering. I had a patient there and the students were able to ask questions but still lots were chattering. I couldn't interrupt because of the outsider but really if they want to chat they should go somewhere else to do it…. The college is dealing with it by introducing a student charter which taps into GMC guidelines. The lack of discipline can be a shame because the majority find the lectures useful and the serious ones get upset. I think they would prefer the lecture to be abandoned than for the lecturer to tolerate all the chattering (I.)*

The theme of discipline emerged throughout all data sources, for instance, three of seven students commenting on item 5 (obstacles to learning) agreed: *"Others in the class distracting" (QS1).*The need to reduce boredom also emerged from all data sources with students commenting on boredom or didactic teaching methods For example, *"ineffective tutor teaching methods i.e. just chalk and talk, reading verbatim." (QS1)*Two students mentioned as obstacles the complexity of content and two took personal responsibility for failing to maximise the potential of learning events: "*Not spending enough time to go through the notes personally after the lecture" (QS3)*

Only 200 of a potential 300 students attended the lectures, which M found "disappointing" (I). He believed motivation for attendance was primarily knowledge acquisition to pass the exam (three students agreed) and that some were "*very competitive and don't want to miss anything"* (QT)

The data consistently demonstrated M's efforts and range of creative strategies, for example, metaphors, anecdotes, invited patients and use of technology to engage and empower learners. He believed these approaches would aid knowledge recall, retention

and enhance performance at summative points. The learning contract seemed to implicitly relate to high stakes issues, i.e. passing exams. *"You have to make lectures enjoyable to grab their attention if nothing else... they will remember it more. So they will retain information"*

> *Some concepts are really difficult. You have to find other ways for the students to understand... I used peanuts. The students took peanuts on a tray (the supplier) then others transported them on a spoon, someone might eat a peanut. …It fell a bit flat in such a large group. I think I need to direct them where to look. I think it can work and needs to be done better. We didn't have enough preparation this time. There is some research that students given this kind of visualisation retain the information and perform better in the exam. It is worth this being an ongoing idea. We will try it again next year. It is important to be specific and get into a metaphor quickly or you lose attention. (I)*

For instance, a very powerful change of pace was observed during session one, when "No surprises", by popular band Radiohead, was shown[7]. This close-up video of the singer's head inside a diving helmet, as it filled with water created a powerful moment when at last the water was released and the singer gulped in oxygen. Not surprisingly, I noted high levels of attention in the room (O). Some evidence of a hidden curriculum related to the emotional dimensions of learning and preparedness for clinical practice emerged through this chosen video extract: "*Shock tactics. If you give it to them in the first year they get a better perspective on what they are letting themselves in for. They know from the outset this will lead to them seeing patients who are really quite desperate. It has a sort of sobering impact on them" (I/O).*

QUESTIONNAIRE ANALYSIS

Whilst five of seven student comments on motivation highlighted compliance and a seemingly surface approach to learning (Marton and Saljo 1997); *"part of my studies /curriculum/" and "timetabled" (QS3/7). O*thers mentioned elements pointing towards deeper or strategic engagement. Others stated "*I want to learn" (QS6); "I need*

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[7] Video available at http://www.youtube.com/watch?v=qqsyXdj_p_I

complementary notes to understand" (QS5) and; *"learning about the respiratory system is a vital part of medicine and my ambition is to qualify as a doctor"* (QS4.)

Similar percentages of students mentioned exams or specific learning outcomes as their hopes or intentions. Three mentioned wanting to "*understand*". The tutor hoped for and intended (sustainable learning) that *"students enjoy the sessions, find them relevant and interesting coming away with a better understanding of key concepts or at least recognise those concepts they will need to study further"*(QT).

CONCEPTIONS OF FEEDBACK

Table 8.1 highlighted confusion about the type and quality of feedback which could be expected. Student understandings of feedback seemed rather misaligned with the observational and interview data. Other than the agreement of 70% of student respondents to whole group feedback, different understandings emerged suggesting a lack of clarity and confidence. M was extremely confident of the quality of his feedback, whilst the student mean rating was a relatively low 5. It may be important to note here that M was rating himself, whilst students might have rated their experiences/ expectations of the wider faculty. Only 43% of the student cohort expected written tutor feedback or direct feedback from others. None but the tutor recognised indirect feedback from peers; 28% of students ticked no feedback and only 28% self-evaluated. These figures suggested some lack of agency by the majority of students, who appeared unaware, or failed to recognise or utilise feedback sources and the indirect cues observed, for example, explicit feedback provided directly to the group through a quiz (second observed session).

TABLE 8.1 UNDERGRADUATE PERCEPTIONS OF FEEDBACK

The role and type of feedback	Medical Lecturer	percentage of student cohort
Individual feedback from the lecturer	X	28.8%
Verbal feedback to the whole group from the lecturer	X	71.4%
Written feedback from lecturer	X	42.9%
Non-verbal or indirect feedback from the lecturer		14.3%
Feedback directly from other learners		42.9%
Feedback indirectly from other learners	X	0%
I give myself feedback		28.6%
No feedback		28.6%
Other		0%

Students used voting pads to answer typical examination questions and M used the scores to identify and respond to gaps in knowledge and understanding. Students

appeared to identify this strategy as feedback to the group without recognising how the use of this voting technology would allow them to self-evaluate and use the feedback. The notes from my observation illustrated group feedback: *"M says 102 got correct answer D, 56%. Glad half of you got it right. M makes a clinical teaching point and says, "OK"? Question 2, 61% right. Someone in the audience says a satisfied "ah yes". M says "remember that". Question 3 of the 40% who didn't get it right, who hasn't done a practical yet? Question 4.all should get this right – who hasn't done OK? Question 5, first years always have a problem with this; only 21% got it right so let me explain….. M starts walking and gesticulating. I note a question to myself: what are the cost / benefits of technology?"(O)*

M's rationale for the quiz was complex, highlighted his perception of predominantly surface approaches, a high stakes assessment environment, and demonstrated his efforts and desire to identify gaps and provide feedback (I). During the interview the emotional impact of student responses on M became apparent but I did not witness any expression of these emotions in the classroom, suggesting a culture of emotional silence and high emotional labour.

> *"I thought they would be more likely to come for a quiz. It consolidates, suggests what might come up in the examination and can flag up confusion. …..This is why I am **disappointed.** Give them questions to think about what might come up.   I can feel **despondent.** ….. (quiz) great way of consolidating what you have taught them and another thing is it shows the students the stuff they are learning might be examined. ….. I like it. Keeps me healthy to keep improving and polishing it. … I want to use other experts and fine tune it (series of lectures/ quiz) and use feedback. It's popular but not a big deal. (I)*

CONFIDENCE

The level of confidence among the learner cohorts was, relative to other cases studied, misaligned. Students lacked confidence that aims would be met or that the teacher would help them. M seemed unconfident about learner motivation and improvement but surer about potential to achieve and his capacity to help. The mean confidence ratings showed students as 1.3 points lower overall and 4 points less confident regarding helpfulness of feedback (see table 8.2).

TABLE 8.2 5RHYTHMS CONFIDENCE

How confident are you that ?	Medical Lecturer	Mean cohort of learners
Achieve aims for the session	2	6.67
Pedagogue will help learners	3.00	6.33
Learners are motivated	5.00	4.20
Pedagogue provide helpful feedback	1.00	5.00
Learner will improve	6.00	3.57
Learners will enjoy session	4.00	3.29
total	21	29.06
Mean confidence	3.5	4.84

Where rating of 1 is high and 10 is low

Table 8.3 illuminated differing understandings of roles and responsibilities in this pedagogic encounter. From the 33 qualities there was limited agreement between learners and lecturer. Three items in the teacher's list were not rated by learners. The one dispositional quality that was rated in both columns was patience and tolerance, whilst respect for learners and confidence appeared only in the lecturers' list. The learners chose almost exclusively behavioural qualities **from** the tutor / **towards** the learners (low reciprocity) with clarity of instruction and explanation valued highly along with demonstration, suggestion and correction.

TABLE 8.3 UNDERGRADUATE TOP-TEN QUALITIES TEACHERS SHOULD BRING

Quality	Lecturers view	Mean learners ratings
Confident	X	
Maintain discipline	X	2nd
Encourage learners	X	7th
Respects learners	X	
Patient and tolerant	X	2nd
Notice when learners are struggling	X	
Listens	X	0
Lets learners ask questions	X	2nd
Lets learner make criticisms	X	
Recognises their limitations	X	0
Knowledgeable		2nd
Gives clear instructions		7th
Explains clearly		1st
Demonstrates clearly		2nd
Suggests things learners can do		7th
Corrects learner		7th

The tutor expected to notice when learners were struggling, recognize limitations, allow them to make criticisms and ask questions which were not student expectations. There was high agreement that the lecturer should maintain discipline.

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Arguably, cultural and language misunderstandings might explain choices. The tutor appeared permissive and inclusive, indicating a transformative conception and offering both propositional and experiential knowledge-creation opportunities, whilst learners appeared more transactional in their expectations. There was slightly less contractual confusion in relation to the qualities expected of learners (see Table 8.4).

TABLE 8.4: QUALITIES UNDERGRADUATE LEARNERS SHOULD BRING TO THE LEARNING SITUATION

Quality	Pedagogue view	Mean learner ratings
Respect for pedagogue	X	1st
Respect for other learners	X	3rd
Trust the pedagogue	X	7th
Follow instructions	X	5th
Listen to pedagogue	X	1st
Push themselves	X	7th
Willing to try harder	X	7th
Ask pedagogue questions	X	
Watch the pedagogue	X	
Learner self-belief	X	0
Obey pedagogues instructions		7th
Support other learners		3rd
Admit what they don't know		7th
Pedagogue is expert		5th

In relation to the 23 qualities acknowledged by tutor and learners, only one lecturer choice "learner self-belief" was unrated by any students. Four qualities un-chosen by M appeared in the student top-ten with "pedagogue is expert" (5th), "obey teacher" and "admit what they don't know", equal (7th). The analysis of the qualities chosen reveals a pattern of trust and respect expected to flow only toward lecturers, which is more consistent with hierarchical, teacher-centred transmission models associated with old style apprenticeships. Students were firmly focussed on following and obeying instructions. It seems students expected students to admit what they didn't know, but not so expert teachers. The teacher however, did choose "recognising limitations" for himself. Students didn't appear to experience themselves as empowered (no response for "express opinions" or "criticise"), despite teacher intentions to enable them to ask questions and benefit from extensive feedback in many forms. Learners valued peer support.

Tutor choices indicated a tendency towards transformational and inclusive ideas, such as self-belief and interactivity, despite the group size. There was limited evidence of relational caring or affective components of learning. Reciprocity was low.

This case study serendipitously witnessed a faculty response to on-going complaints regarding year 1 group behaviours:

> *"Unfortunately, we also need to grapple with discipline…. should be considerate… In the first lecture of this series there was lots of chattering. I had a patient there and the students were able to ask questions. But still lots were chattering. I couldn't interrupt because of the outsider but really if they want to chat they should go somewhere else to do it" (I/D).*

It appeared neither teacher nor students felt in control of the learning environment, perhaps identifying a need to render the contract more explicit and refresh expected behavioural rules. Lack of familiarity with individual teachers could have impacted on the development of relational rules. The size of the group and the physical environment, where students may be seated a distance away from the teacher, might also hamper a sense of engagement.

RELATIONSHIPS

When asked about the nature of their relationship with M, a range of descriptors emerged: *"friendly, but by no means on first name terms" (QS1); "Distant" (QS2)* and *"Don't have one" (QS6)*

One respondent simply commented *"my tutor" (QS5)* which might suggest individuals lecturing to large groups are not perceived in relational terms, unless known to the student personally. M described his relationship with these students as "*positive, encouraging and helpful".* Table 8.5 highlighted dissonance between student and tutor expectations. A pattern of low reciprocity with the direction of care (responsibility for successful outcomes) coming from the tutor emerged from these data. Noteworthy were consistent differences between the tutor and mean student ratings suggesting a lack of clarity relating to the immediate learning contract (between participants in this learning event). Learners expected less care than the tutor gave and the latter expected little care in return.   The tutor assumed reciprocity of trust although relative to other case studies

this was only a moderate score and learners expected far less respect from the teacher than they afforded him.

TABLE 8.5 UNDERGRADUATE EXPECTATIONS OF RELATIONSHIP

	Pedagogue	Mean Learner ratings
Pedagogue will **care** about learner	2.00	4.43
Learners will **care** about pedagogue	6.00	4.86
Pedagogue will **trust** learner	3.00	6.71
Learners will **trust** pedagogue	3.00	3.43
Pedagogue will **respect** learner	2.00	3.86
Learner **respect** pedagogue	4.00	2.29
Quality of relationship impacts on learning	2.00	4.57
Quality of relationship impact on group	Not asked[ii]	
I will care about them as a group		

Where 1 is highest and 10 is lowest

Differing conceptions of respect seemed to be operating between teacher, faculty, and students. This achieved the highest rating from the cohort of learners 2.29. Other data sources suggested dissatisfaction with "a *few student*" behaviours being experienced by tutors, faculty and some peers but this was only directly expressed by the faculty.

Apparently, implicit, complex contracts operated, where students were required to trust the faculty, with its links to a profession in the process of changing its pedagogic approach. The teacher had been taught under the traditional, mainly transmission, model method, then re-trained to understand learner-centred, more transformational pedagogies. He demonstrated how he was somewhat caught between the two paradigms when explaining:

> "..something ***I'm*** *not doing right*" … *There used to be an emeritus professor here – he was old school. He commanded respect. The students were petrified. He walked up and down the aisle, would point to student and say, you, just because you are sitting at the back doesn't mean you will escape questions. Don't think you are safe the students would all pay attention. It takes a certain kind of person to pull that off. It's not my style."* (I/D)

It was not clear that learners recognised or appreciated the level of care from the tutor being expressed in effort, responsiveness to group feedback, performance and degree of empathy. The tutors' highest score, 2.00, was for the impact of the relationship, whilst students scored a moderate 4.57 again, suggesting the effort to generate a caring relationship was assumed to lie with the tutor.

As the researcher, I identified confusion due to changing orthodoxies and/or new conceptions of knowledge (orthognosis). For instance, the tutors' understanding of

transformational learning had yet to be communicated to learners, while orthopraxis and professional standards had yet to be communicated to students, who are then felt to behave disrespectfully. Responses to teacher disappointment in learner behaviours seemed to elicit greater empathy from the tutor (possibly requiring emotional labour) or through reference to hierarchical organisational power where rudeness to patients or unprofessional behaviours were highlighted rather than unreciprocated care and respect towards the individual lecturer.

SUMMARY

A degree of misunderstanding about the nature and expectations of behaviours and relationships between the teacher and learners appeared to exist with limited shared understanding of what constituted feedback. The culture in the lecture theatre seemed confused by limited reciprocity of care, respect or trust between these aspiring doctors and the individual educator. The learning contract appeared to be somewhat abstract i.e. between the HEI / and the profession rather than the pedagogue and learners.

The learning culture appeared to be at a point of transition, where considerable respect was still afforded to the traditional, teacher-centred transmission model, by which the lecturer had himself been trained and the newer learner-centred transformative model encountered through staff development processes. The findings suggested some dissonance and confusion, which arguably resulted in demands for emotional labour by the tutor, who masked disappointment and irritation with learner behaviours, quiz outcomes and thus expected less care than what he was given. Limited evidence of student accountability for themselves or their peers or learner-control emerged. Students located accountability for discipline and learning outcomes with the teacher.

PART THREE: DISCUSSION, CONCLUSIONS, AND APPLICATIONS

CHAPTER 9 FINDINGS: ALIGNMENT OF FORMATIVE PEDAGOGY WITH LEARNING CULTURES AND CONTRACTS

APPLES AND PEARS: LIMITATIONS OF COMPARISON

Now the four case studies are considered together to illuminate and capture the potential of formative pedagogy through a number of lenses, which emerged through the iterative literature review and data gathering processes. This chapter is divided into four sections: analysis, broad descriptors, emotional intelligence and discussion.

Inevitably, comparison and generalisation was difficult due to each learning episode being different in relation to many elements, such as size of group and teaching method known to impact on efficiency, active learning, feedback and role modelling opportunities (Gordon 2003). Still it was possible to compare and contrast, in relation to the research questions, at the level of broad descriptors and, as often with cross-case analysis, by using "*displays, matrices or other arrays of data*" (Denzin and Lincoln 1994:437), for instance, analysis and presentation applied to the simple Emotional Intelligence matrix (Goleman 2001:34).

In line with the Appreciative Inquiry stance and recognition of the range of events sampled, all critique is of pedagogic methodologies and institutional assumptions, never of individual tutors or learners.

The findings in this chapter are based on the Cooper and Mcintyre (1993) thematic analysis model, where themes from the literature review and some open coding of the data were developed into further lenses for multiple readings. These included lenses of difference, similarity, Noddings' (1984) 3Rs - caring responsiveness, reciprocity and relatedness; Beatty and Brews' (2004) emotional cultures; Mann's (2006) emotional typology – harmony, dissonance and deviance; emotional intelligence on display; Pekrun's (2006) value control theory and Plutchik's (2001) emotional shades.

MOTIVATIONS, INTENTIONS AND EXPECTATIONS

Open-ended questionnaire items (Appendix 4:2) investigated the context of relationships between tutors and sample cohorts of learners. Item 3: "How often have you worked with these students / tutors before?" found the highest level of familiarity between the GP training group and the lowest undergraduate lecture. In both these cases, the tutors were allocated by institutions. Familiarity in Kungfu and 5Rhythms suggested greater evidence of a particular tutor influencing learner motivation to attend.

Other items were designed to capture motivations, intentions and perceived obstacles to learning by asking participants to complete the sentences:

I (believe these students) come to the class because…;

I hope (the students) leave having…; and

Things that might get in the way of learning…

Open reading of all verbal data identified seven broad coding categories of responses summarised by case study in Table 9:1. Predictably, motivational differences emerged. H&PE students focussed on outcomes, for example passing examinations and external recognition. Participants in the lower stakes, drop-in classes, had greater choice about tutors and showed more process-aware motivations, such as enjoyment and relationship with the teacher. However, differences between the hopes, intentions and learning orientations of undergraduate and postgraduate medical programmes already indicated that GPs had more in common with the holistic desires of non-medical learners, for instance, using sessions for personal and skills development, problem solving, stress management and well-being. Undergraduate responses tended towards responses which, suggested surface approaches to learning where hopes and motivations were linked to narrower cognitive development or examination success.

5Rhythms and Kungfu students perceived obstacles as potentially overcome through practice, preparedness and self-discipline, whilst undergraduates took less personal responsibility for their learning with two participants specifying tutor attributes as threats to their success. Kungfu students described their relationship with Shifu in positional terms i.e. student-teacher and descriptive relational terms for example mentioning "gentleness" and "jokes" with an evident reverence towards Shifu, referring to the privilege of studying with "*a master of this calibre*". (QS1)

The most idiosyncratic and wide-ranging responses came from 5Rhythms respondents, who seemed empowered to challenge and redefine meanings but shared a focus on process and self-discovery. Unfettered by summative assessment, they sought understanding, self-enhancement, psychological and physical wellbeing.

Emergent Categories from open coding of responses to questionnaire items 4-6	GP	Kungfu	5Rhythms	Undergraduate
Motivation: the specific course title/content	11	12	1	1
Process or affective reasons	2	5	9	0
Specified outcomes	8	1	3	16
Required to achieve goals	24 (7 mandatory)	15	0	3 (all mandatory)
Specific teacher		6	12	1
Learning personal professional growth	7	15	11	7
Relational descriptors	10 (all affective/ judgements)	13 (3 positional)	22	8 (3 limited / 1 no relationship)

5Rhythms responses to questionnaire item 7, describing relationships between tutor and learners, used emotional qualitative judgements extensively -*"like", "love", "enjoy"* and *"fabulous"*. Noteworthy differences arose in the undergraduate study, where the lecturer was perceived as *"distant", "cordial"* or there being *"no relationship".*

Table 9:2 summarises Likert scale responses to statements in questionnaire Item 8, rating confidence in relation to achievement, helpfulness, motivation, receiving valuable feedback, learner improvement and enjoyment, where one equalled extremely confident and ten totally unconfident. Mean learner statement ratings and overall item means were assumed to indicate confidence in the pedagogic exchange in and between case studies.

Three of four tutors' shared similar overall confidence scores (19 – 21). Kungfu was the outlier, as Shifu expressed supreme confidence based on mastery, and his cohort concurred, with an alignment of only 2.7 points difference between them. The 5Rhythms tutor (19) and her students (20.26) were within 1.26 points of each other and the GP tutor and learner totals differed by 3.48 points, suggesting alignment within the learning contract. The undergraduate Case study was the outlier. The lecturer score of 21 was in line with two other tutors but mean cohort ratings showed the lowest alignment and confidence (> 8 points). The lowest undergraduate ratings were given to achievement of aims and teacher helping, which combined with limited choice of tutor would suggest a low perception of value-control by learners. The undergraduate lecturer was least confident about learner motivation or improvement. The highest confidence rating in the undergraduate case study was for enjoyability, although other data sources indicated

responsibility for entertaining performances and consequent engagement lay with tutors. For instance, as previously quoted, *"it is obvious to me that you have to make lectures enjoyable to grab their attention if nothing else. Enjoyable lectures, they will remember more. So they will retain information"* (I/d).

Case study	GP		Kungfu		5Rhythms		Undergraduate	
Ratings of confidence	Tutor	Mean learner scores	Shifu	Mean learner Scores	teacher	Mean learner scores	lecturer	Mean learner scores
Achieve aims for the session	3.00	2.82	1.00	1.6	3.00	3.43	2.00	6.67
Pedagogue will help learners	4.00	2.30	1.00	1.3	3.00	2.00	3.00	6.33
Learners are motivated	3.00	2.73	1.00	1.5	4.00	3.33	5.00	4.20
Pedagogue provide helpful feedback	3.00	2.82	1.00	1.6	3.00	4.00	1.00	5.00
Learner will improve	3.00	2.90	1.00	1.3	3.00	4.00	6.00	3.57
Learners will enjoy session	4.00	2.95	1.00	1.4	3.00	3.50	4.00	3.29
Total confidence scores	20	16.52	6	8.7	19	20.26	21	29.06
alignment		-3.48		+2.7		+1.26		+8.06

INDICATORS OF EMOTIONAL CULTURES

Questionnaire Item 7, reported in Table 9.3, used a similar rating scale to identify expectations of pedagogic relationships. Mean cohort responses for items relating to care, trust, respect and relationship were used as indicators of alignment within albeit tacit learning contracts. All but one item, across the four studies, (under-graduates' expectation that the tutor would trust them) were rated between 1 and 5 (high). Arguably, as there no ratings fall within the range 6-10, across all four case studies, it might be inferred that some form of relational caring was expected by all participants i.e. in response to research question one there is limited difference between perceptions of pedagogic relationships.

Assuming the points of difference between pedagogues and associated cohorts (shown in brackets) are indicators of alliance, then Table 9:3 shows aligned patterns of expectations

about care, trust and respect for GP, kungfu, 5Rhythms case studies. Least alignment appears in the undergraduate case study.

TABLE 9:3: MEAN RATINGS OF EXPECTATIONS AND ALIGNMENT OF TUTOR/LEARNER RELATIONSHIPS

	GP		Kungfu		5Rhythms		Undergraduate	
	Tutor	Mean learner/Cohort	Shifu	Mean learner Cohort	teacher	Mean learner Cohort	lecturer	Mean learner Cohort
Pedagogue will **care** about learner	3.00	2.03	1.00	1.9	1	1.67	2.00	4.43
Learners will **care** about pedagogue	3.00	2.18	2.00	1.5	2	1.89	6.00	4.86
Pedagogue will **trust** learner	2.00	2.27	1.00	2.3	3	1.78	3.00	6.71
Learners will **trust** pedagogue	3.00	2.00	1.00	1.3	2	1.44	3.00	3.43
Pedagogue will **respect** learner	2.00	2.09	1.00	1.70	1	1.33	2.00	3.86
Learner **respect** pedagogue	3.00	2.00	1.00	1.20	2	1.44	4.00	2.29
Quality of relationship impacts on learning	1.00	2.20	4.00	3.20	1	3.44	2.00	4.57
Total expectation of relationship (y)	17	15.07	11	13.1	12	12.99	22	30.15
Average overall confidence (y divided by 7)	2.42	2.38	1.57	1.8	1.71	1.85	3.14	4.30
Alignment	High tutor + 0.04		High Tutor + 0.23		High Tutor - 0.14		Medium Tutor - 1.16	

Comparison between tutor and mean cohort ratings of relational caring produced a similar pattern high of alignment in 5Rhythms, Kungfu and GP training respectively (all within 0.2). Again the outlier was undergraduate medical education, where the difference in overall expectations of a relationship was > 8 (lecturer 22 and learners

30.15), suggesting that expectations of respectful, trusting and caring relationships between individual educators and learners were less evident in this context.

Teachers expected to give and receive care (<1 point difference between tutor/learner rating) while learners trusted and respected teachers and vice versa (< 1 point difference). Alignment of reciprocal caring were lowest in the undergraduate study, where the lecturer cared about the learners more than learners expected (2.43) and expected less than they offered (1.14). Similarly, there was greater alignment between expectations that learners should trust and respect teachers than vice versa. The lecturer's highest rating (2.00) was awarded to respect for learners and impact of relationship on learning again not mirrored by the cohort, who assumed the tutor would be unlikely to trust them (6.71) and rated the impact of the relationship lower at 4.57. Tutor expectation of respect from learners was 4.00, while students rated this item the highest in the set at 2.29. Thus two different paradigms seemed to be operating, where the students accepted a traditional teacher-knows-best approach whilst the tutor was adopting a learner-centred approach.

The undergraduate pattern in table 9.3 suggested some confusion in relation to the learning contract, culture, roles and possibly behaviours. In this context of large group lecturing expectations on learners were unclear with less shared understanding or reciprocity than other cases studied.

EXPECTED QUALITIES OF TEACHERS AND LEARNERS

The pattern of higher levels of dissonance and misalignment between medical undergraduates and lecturer continued in relation to statements asking recipients to rate the top-ten qualities a teacher should bring to their teaching and the top-ten qualities the learner should contribute

Table 9.4 summarises **pedagogic** qualities where there was agreement among tutors and learners in each case study.

Notably, whilst kungfu and undergraduate learners agreed on the value of discipline and teacher encouragement, there was less agreement in the top-ten choices amongst the medical cohort and their tutor. Neither Shifu nor 5Rhythms tutors were expected to be patient and tolerant, qualities expected from medical educators. However, respect **from** the teacher was a shared expectation in both informal-learning case studies.

Encouragement of learners, peer education and noticing struggling learners were valued by those participating in the GP training and 5Rhythms classes. Only the GPSPRs chose caring and listening alongside their tutor, both highly relevant for effective GP practice.

TABLE 9:4 SUMMARY OF PEDAGOGIC QUALITIES EXPECTED BY TUTOR AND LEARNER COHORTS.

Number of choices shared by tutors and mean learners cohorts	GP 5	kungfu 6	5Rhythms 5	Undergraduate 4
List of shared tutor qualities expected	Patient & tolerant Notice learners struggling Encourages peer learning Listens Cares	Discipline Efficient teaching Suggest activities Encourage learners Respect Push	Gives clear instructions Respect notices learners struggling encourages peer admit what don't know	Discipline Encourages learners Patient & tolerant Lets learner ask questions

Table 9.5 summarises the top-ten qualities **learners** should bring to the learning situations, agreed by tutors and learner cohorts. Noteworthy was agreement in all casestudies that learners should show trust and respect towards teachers. This was different to the findings set out in Table 9.4. All except those participating in the Kungfu valued respect for peers, whilst peer support, peer learning and use of own experiences were valued by GP trainees, 5Rhythms learners and their tutors. Following instructions, listening to teachers and pushing oneself were valued by kungfu and undergraduate learners. Interestingly, whilst Shifu was the only teacher that expected obedience, 57% of the undergraduates rated this item and concurred with Shifu's choices of follow instructions and listening to the teacher. This might suggest that kungfu students and undergraduate learners share expectations of traditional teacher-centred, transactional models of pedagogy, whilst the lecturer followed a more learner-centred transformational paradigm. In relation to research question one and two, arguably whilst this expectation of teacher responsibility for learning is not a problematic perception within the former it may not reflect the changes in culture from a transactional to transformational learning culture being pursued within medical education literature and policies such as tomorrows Doctors 2009 and Swanwick 2010.

In light of these findings, the lists of qualities were further analysed to identify patterns of reciprocity. Open coding against each quality was categorised in three ways: behavioural; affective / dispositional; or judgement making and expressed in four possible directions: from tutor; towards the tutor; towards others; or towards self (See appendix 4.7).

TABLE 9.5 SUMMARY OF LEARNER QUALITIES EXPECTED BY TUTOR AND LEARNER COHORTS

Number of choices shared by tutors and mean learner cohorts	GP 7	Kungfu 6	5Rhythms 7	Undergraduate 6
List of shared tutor qualities expected	Respect teacher Respect peers Trust teacher Support peers Learn from peers Ask teacher questions Use own experience	Respect teacher Trust teacher Follow instructions Listen to teacher Push self Ask teacher questions	Respect teacher Respect peers Trust teacher Support peers Learn from peers Recognise limitations Use own experience	Respect teacher Respect peers Trust teacher Follow instruction Listen to teacher Push self

Coding showed students rated mainly behavioural and dispositional items tutors should adopt towards them. Tutor capacity to reach judgements about themselves also received some priority.

Table 9:6 summarises this secondary analysis. The pattern of rating self-assessment qualities (significant in emotional intelligence and sustainable formative assessment) triangulated with findings from observations and interviews. That is, GP trainees and 5Rhythms dancers expected higher levels of self-assessment than the Kungfu or undergraduate studies.

Tutors expected more dispositional behaviours from themselves than the learners expected of them. Only Kungfu students chose fewer 'from' than 'towards' qualities. Overall, there seemed to be high levels of congruence about behaviours towards

pedagogues within the case studies. Arguably, this suggested some degree of reciprocity but with a greater emphasis on teacher caring.

Respondent choices Dispositional Qualities.	GP tutor	GP trainees	Shifu	Kungfu students	5Rhythms Tutor	5Rhythms dancers	Undergraduate Lecturer	Undergraduate students
From tutor	4	2	4	1	3	2	3	2
Towards tutor	2	2	2	2	2	2	2	2
Self-judgement qualities of students	1	3	-	-	3	2	-	-

(See appendix 4:7 for more detail)

CONFIDENCE AND EXPECTATIONS OF FEEDBACK

Table 9:7 shows expectations of feedback perceived by tutors and learners. Conceptions about form and style of feedback were equally, though differently, diverse in all cases but the outlier was, again, undergraduate medical education, suggesting a lack of clarity of formative assessment within that particular learning contract. From most-to-least congruent were Kungfu, GP, 5Rhythms, and undergraduate. It was noticeable that both Shifu and the undergraduate lecturer were very confident, scoring 1 and 1.6 respectively. However, in terms of reciprocity, there was considerable difference between the ratings of the learners in the two groups. Kungfu learners shared Shifu's view of feedback, although there was more peer feedback than Shifu had expressed. In contrast, the mean rating by medical students was 4 points less than the tutor, again suggesting space for clarification, greater transparency and understanding of the learning contract especially in relation to this key learning element of formative assessment.

All tutors assumed that they would directly provide some form of feedback. One area of dissonance was that, whilst the undergraduate lecturer ticked indirect peer feedback, this was unacknowledged by any students. This, too, suggested room for clarification and enhanced joint understandings between faculty and learners. Only 5Rhythms did not significantly employ individual feedback (11% learner cohort) with greater emphasis on

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peer and self-regulation. However, this seemed to be clearly understood by learners and congruent with the philosophy and practice: *"don't expect feedback from anyone but find it very useful when I do get feedback from student or teacher"* (QS3) and *"only expect individual feedback from the teacher if I asked for it."* (QS2)

TABLE 9.7 SUMMARY OF EXPECTATIONS AND EXPERIENCES OF FEEDBACK BY TYPE

		GP		KungFu		5Rhythms		Undergraduate	
Re-presented here for clarity outcomes of confidence re quality feedback question 1 = high confidence 10 = low confidence		Tutor **3** Mean Learner score **2.82**		Tutor **1** Mean Learner score **1.6**		Tutor **3** Mean learner score **4**		Tutor **1** Mean learner score **5.00**	
Difference In perception		Tutor less confident -0.18		Tutor more confident +0.6		Tutor more confident +1.00		Tutor more confident +4.00	
choice of feedback		Tutor	% of learner cohort	Tutor	% of learner cohort	Tutor	% of learner cohort	Tutor	% of learner cohort
From teacher A	Individual feedback	X	80%	X	90%		11.1	X	28.6
	Verbal feedback to the whole group	X	70%		70%	X	55.6	X	71.4
	Written feedback	X	30%		10%			X	
	Nonverbal or indirect feedback	X	30%		20%	X	55.6		14.3
Other C	Feedback directly from other learners		60%		10%		11.1		42.9
	Feedback indirectly from other learners		40%				66.7	X	0

D	I giv e myself feedback		20%		30%		77.8%	28.6	
	No feedback						22.2%	0%	
	Other						4 comment s		

Only Shifu didn't claim to offer group feedback, although 70% of the Kungfu learner cohort felt that they received it. Extensive non-verbal feedback was observed. There was also some agreement in relation to the group-work focus of GP training sessions, where 60% of learners acknowledged peer feedback.

LANGUAGE AND MUTUAL UNDERSTANDINGS

Analysis of affective language in verbal data initially used open-coding to identify themes, then sub divided themes into elements that influenced and elements that expressed affective dimensions of pedagogic relationships. These were summarised in Appendix 9.1(Return to coding). The numbers of comments coded, against each element, were then norm-referenced against each other and expressed as High (H), medium (M) or Low (L). As a rating of 6 or above was awarded only once, even "Low" ratings in the table below were deemed relatively significant for learning. These findings, from all data sources, contributed to the broad descriptors for each case study.

Table 9:8 presents an at-a-glance summary to aid comparison

A pattern of GP, 5Rhythms and Kungfu expressing more emotional language than the undergraduate case study became evident when mapped against emergent elements of expectation of caring, reciprocity, conscious self-awareness, and respect. Other patterns of GP and 5Rhythms rating higher, and kungfu and undergraduate lower were, against elements of explicit or clear learning contracts, emotions as part of the curriculum; deliberate use-of-self and Pekrun's value control. GP and 5Rhythms groups shared low expectations that tutors needed to be all-knowing. In relation to reciprocal caring the largest discrepancy between tutor and learners emerged in the undergraduate medical programme. Interestingly, the two medical case studies were only aligned when mapped against certainty, both having medium ratings.

Such patterns suggested Kungfu and undergraduate learners conceived traditional roles for learners and teachers. Such teacher-led hierarchical relationships remain an acceptable norm for Chinese academies.   However, the dissonance between this cohort of undergraduate students and their tutor may indicate the need for clarification and change. Transformational learner-centred paradigms espoused in policy documents such as Tomorrow's Doctors (2009) and informing accredited staff development programmes in HEIs (for example PG Certificate in Medical Education University of Bedfordshire) may be creating additional double-duties, possibly accounting for the highest levels of emotional labour being evident in the undergraduate study.

TABLE 9:8 COMPARISON OF AFFECTIVE ELEMENTS FROM ANALYSIS OF ALL WRITTEN DATA AT THE LEVEL OF BROAD DESCRIPTORS

H = high, M= medium, L=low levels of item coding across the four studies

Case study	GP	Kungfu	5Rhythms	Undergraduate
Coded Elements that influence				
Caring and trust recognised as part of pedagogic relationships	H	H " like family"	H	L
Contract explicitly negotiated between teacher and learner	H	L traditional contract based on learner obedience, expressed in culturally explicit ways e.g. implicit rules of renqing and qanxi.	H learner-lead and verbally re-negotiated at most classes/ workshops	L contract assumed at the level of the institution and professional norms and expectations.
Affective dimensions are explicitly part of the curriculum	H	L emotions are to be overcome through discipline and practice	H emotionally charged environment	L
Concurrence between teacher and student expectations and beliefs	H	H	H emotionally charged environment	L

Shared language	H	M verbal and non-verbal terminology	H	L noticeably different language between transformational concepts introduced through educational development and traditional assumptions regarding student behaviour
Coded Elements that express				
Reciprocity of care	H	H very clear expectations and responsibilities of caring behaviours. Shifu provides safety and expert guidance students are obedient follow	H sense of tutors and students being in service to self and group	L
Conscious selfawareness. Emotional Physical	H ?	? H	H H	L ?
Deliberate use of self	M	L	H	L
Respect	H	M some cultural differences evident	H	Tutor M, Students L
Tutor as expert	M	H	L	H
Expectation of certainty	M	H	L	H
Value control	H	L	H	L

HOW LANGUAGE EXPRESSED AFFECT –THROUGH PLUTCHIK AND PEKRUN'S LENSES

Table 9:9 summarises patterns of affective dimensions of pedagogical relationships and learning cultures identified during critical analysis of the language used to express affect,

informed by Plutchik's shades of emotions (1960) and Pekrun's (2006) typology. (It is important to note that scores may be skewed due to tutors having generated more of the textual data). Specific feelings, emotions and mood were analysed by mapping comments to Plutchiks' shades of emotions and afforded values as positive, agitated and negative using Pekrun's typology.

Considering the data through these lenses provided patterns of language and display-rules, which were useful for interpreting the phenomenon in question, but did not provide quantitative or reproducible measures. Codings were based on the number of mentions of words which seemed to fall loosely into each category where Tutor (questionnaire, interview and transcript of researcher observation) = T and combined learner cohort plus researcher observation) = LC. The findings were norm-referenced across the four case studies and classified as, relatively, VH =Very High; H= Higher; M=Medium; L=Lower and Z=Zero, then presented to support the subjective descriptor and assumptions reached and underpinning the discussion that follows.

Assuming that positive emotions enhance and negative emotions create less favourable conditions for learning, a few noteworthy patterns emerged from the data. A higher level of dissonance was evident between undergraduate tutor and cohort in relation to Pekrun's (2006) negative and agitated categories, for example, annoyance and despondence. For instance, the tutor indicated: *"Every year I notice they are all chatting"* and when only two thirds of students turn up this is why I am disappointed. *I give them questions to think about what might come up. Can feel despondent" (I/d)*

This may be due to a climate of emotional silence and internalised feeling rules. The anger seemed to be expressed between the institution / profession and cohort almost bypassing the relationship between human beings i.e. tutor and student(s). Across the four cases, only Shifu scored high on anger and, in the observation, I noted this as *"pensiveness".* The positive affect of student *"trust"* in the undergraduate study appears to be in the profession or the institution rather than in individual teachers. For example, in the observation I noted that *"at the end of the lecture a senior academic and president of student union join the class to address them about non-attention, complaints about the amount of talking. They mentioned professionalism and I notice they did not use the term disrespectful but I realise that is what I am thinking" (O/d)*. Noticeably, both GP and undergraduate educators mentioned the avoidance of the negative effect of boredom, for instance; , *"didactic...risks boredom. They often lose interest unless you have a really good speaker... We try to challenge and retain interest not just preach" (I/A)*.

Overall, the undergraduate students seemed to display least affect, rating zero against eight of the categories, whilst in the negative and agitated categories the tutor coded quite

highly. Also noticeable was that Plutchik's "love" category which showed students from all groups coding higher than tutors except for undergraduate where both tutor and learners were categorised as expressing low levels of affect.

Affective dimensions of learning	GP		Kungfu		5Rhythms		Undergraduate	
T=tutor ;LC learner cohort	T	LC	T	LC	T	LC	T	LC
Positive affect								
Trust Admiration, trust, acceptance,	H	M	VH	M	H	M	M	M "In profession"
Positive intention Hopefulness, positive, surrender	VH	L	VH	M	H	L	VH	H
Joy Ecstasy, joy, serenity	VH	M	H	M	H	M	M	Z
Love Like, love, adore	L	M	L	H	L	VH	L	L
Care Empathy, care, concern	VH	L	VH	M	VH	L	VH	M
Anticipation Vigilance, anticipation, interest	VH	L	H	Z	M	L	H	Z
Negative affect								
Disgust Loathing, disgust boredom	L	Z	L	Z	L	L	H	L
Agitated affect								
Fear Terror, fear, apprehension	H	L	M	L	L	M	M	L
Anger Rage, anger, annoyance	L	L	H Pensive Ness	Z	L	Z	VH	Z
Other affects								
Confidence Anxiety, confidence, self-esteem	H	L	VH	M	H	L	M	Z
Comfort Discomfort, comfort, relaxed	VH	L	VH	Z	H	L	L	Z
Openness Tiredness, openness, readiness	VH	L	H	M	M	M	M	Z
Belonging Individual, belonging, community	VH	L	M	Z	L	L	L	Z
Usefulness Relevant, Useful, Dispositional	M	M	M	L	L	L	M	Z

Where, VH= very high; H=high, M=medium, L=low, Z= zero relative numbers of codings

SECTION 2: SIMILARITIES AND DIFFERENCES AT THE LEVEL OF BROAD DESCRIPTORS

Below are broad descriptors drafted and developed from the analysis of findings following multiple readings of all the qualitative data, i.e. sentence completion and comments in questionnaires, interview and observation transcripts, related to each case study. The broad descriptors are expressed and grouped into subheadings under the research questions. Question 1 is what are teachers' and learners' perceptions of pedagogical relationships? How do they differ? Question 2 asks how do the emotional cultures of learning environments influence the effectiveness of these relationships?. The third question asks How might the deliberate use of pedagogical relationships impact on the effectiveness of formative assessment?

BROAD DESCRIPTORS IN RELATION TO RESEARCH QUESTION ONE- DIFFERENCES IN TEACHER AND LEARNER PERCEPTIONS OF PEDAGOGIC RELATIONSHIPS

THE LEARNING CONTRACT

The GP learning contract was negotiated at policy and personal levels with care, trust, and respect considered essential components of teacher-learner relationship useful for exploration of parallel developmental targets of effective pedagogy and patient-centred medicine. Emotional terminology & language were frequently used. Trainees placed considerable emphasis on tutor knowledgability but did not assume them to be expert as recognition of limitations and willingness to acknowledge not-knowing was highly valued.

In the Kungfu culture, teachers and students were "*just like father and son*" (I/B), so the relationship was based on traditional notions of trust and respect. The relationship was developed through various mechanisms, including sharing of biographical achievements (images), demonstration of skill and rituals.

Student and master data showed high levels of concurrence although some evidence of cultural difference existed where UK students did choose "to obey". There seemed to be an implicit contract operating, with high levels of physical care and belief that desired positive outcomes (for example, physical fitness or martial arts techniques) would be achieved quickly.

Shifu's explanation of his pedagogic approach fitted with observation and questionnaire results to identify that Kungfu operated in a hierarchical teacher-centred transmission model.

In 5Rhythms, the focus was on authentic movement with consistent messages that there was no right or wrong. Classes were structured to encourage self-awareness, selfacceptance and self-esteem, with considerable value placed on mutual trust and respect for self, one another and for the practice as a means of developing a safe space to explore personal vulnerabilities and move outside normal patterns and comfort zones.

In the undergraduate medical school, the learning contract and relationship appeared to be made in part with the medical school, faculty or profession, rather than the individual tutors, covering smaller elements of the curriculum. Expectations seemed reliant on compliance with regulation or professional image rather than personal responsibility.

Students were upset by disruptive elements and expressed the need for discipline, viewed as the responsibility of the teachers. The data pointed towards a transition between transactional and transformational models causing a degree of confusion for tutors and learners moving from a teacher to a learner-centred model.

Reciprocity

GP participants displayed reciprocity of caring, trust and respect, both for and from learners, with evident and explicit recognition of how these dispositions and behaviours were relevant to professional development activities. Behaviours and reported experiences suggested significant concern in both directions.

The Kungfu study showed relational caring having different meanings within Chinese culture with renqing (relationship rules) and quanxi (face) governing the manner in which "favours" were given. There was, however, considerable reciprocity evident where the students showed reverence for Shifu, who in turn placed great faith in their ability to learn under his tutelage.

In 5Rhythms there was high but realistic reciprocal caring with the greatest focus on self-care in balance with respect for, and trust in, others in the community of practice and an explicit circular dynamic of learning from and by the teacher.

In the medical undergraduate setting, there was relatively little reciprocal care, with learners and pedagogue agreeing that the direction of care was towards learners. Most of the effort to avoid boredom seemed to be carried by individual educators.

DISPLAY RULES

For GPs the concept of "discomfort" was widely used to bring emotional responses into the learning environment with evidence of both tutor and learners disclosing feelings.

The kungfu study rated qualities such as caring, liking and criticism poorly. Yet a high level of mutual concern was on display, qualitative answers and observations suggested regulated and unnamed mutual liking and reciprocal caring with a constant focus on supporting success.

There was an interesting use of language and media (film in particular) used to convey meaning across the liminal space of the Chinese and Western cultures. For example, students were frequently asked if they were "*tired*" or "*lazy*" (low chi or low motivation).

Display of emotions and feelings wasn't problematic for 5Rhythms practice. They informed, were informed by and enabled bodies to express authentic movement. The language of teachers and learners was highly emotive. Expressive words, such as love, like and care, were evident in all data sources. The environment was emotionally charged, with individuals expressing a wide range of different emotions non-verbally at any time. For example, smiling, non-verbal greetings and exchanges with laughter were tolerated at the same time as someone was crying. Levels of emotional labour seemed low.

The undergraduate case study showed limited use of emotional or relational language, especially by the learners. The understating of emotional responses suggested a degree of emotional labour by the tutor. In this interview the tutor uses the words "*disappointed*" and "*despondent*" and seemed most concerned by disrespectful behaviours in front of patients.

Use-of-self

The GP study identified development of self-awareness and use-of-self as desirable curriculum outcomes. The tutor agenda included a focus on sustainability. The development of the learners' ability to recognise and utilise their own emotional responses was explicitly discussed and encouraged by both tutors and peers.

In Kungfu it seemed the self was sublimated to follow the wisdom of masters. Selfawareness was focussed on the physical body. Shifu displayed supreme self-confidence and self-reliance as evidence of high esteem for his master.

The 5Rhythm framework and facilitation of practice was designed to enhance selfawareness, and personal responsibility for achieving self-directed learning from experience. Students attended for a diverse range of reasons, including physical,

emotional, health and wellbeing or personal growth. Teachers perceived themselves as being in service.

In the undergraduate study, some transitional emotional relativism, or even emotional silence, seemed prevalent, with students and tutors dependent on the hierarchy to express negative emotions.

BROAD DESCRIPTORS IN RELATION TO RESEARCH QUESTION TWO. HOW DO EMOTIONAL CULTURES IN LEARNING ENVIRONMENTS INFLUENCE THE EFFECTIVENESS OF THESE RELATIONSHIPS?

POLICY FRAMEWORK

In recent years emotional elements were actively used to achieve GP curricula outcomes including tolerance for uncertainty, exploration of probabilities and marginalising danger (RCGP 2009). The tutor actively monitored her own emotional responses with the aim of creating a safe space for the learners.

Emotions and feelings are problematic within some Buddhist traditions, and are considered as disruptive to the learning, to mastery and to the obedience required within this intensely hierarchical framework. Yet both Shifus emphasised that their pedagogic role required "heart" and considerable reciprocal warmth was present during the study. The Western interest in Martial Arts, may have dislocated Kungfu from its philosophical and religious roots, yet essentially the policy framework has remained the same across centuries.

Within the 5Rhythms community of practice, there was an emotional language for articulating experiences, physical movements and personal learning through reference to a common framework outlined in Roth's maps (1998). Learners actively explored their own emotional responses using terms such as staccato or lyrical as easily understood shorthand. The affective and emotional experiences were explicitly acknowledged and used as relevant to the aspirational role of learners.

There was considerable concurrence between written, articulated, observed accounts and researcher reflections of behaviours with evidence of authenticity and genuineness evident throughout the 5Rhythms data. For instance, mutual tolerance of challenge and reframing was evident in data and in tutor and student responses to the research

process. There were limited hierarchical structures evident with greater focus on roles and responsibilities demarcating teachers and learners, rather than power, in any one learning event. A concept of being "in service" prevailed in the literature and the data. A liminal 5Rhythms language was evident within the community of practice, which has mainly developed through oral exchange and proximity rather than through the literature.

Most medical undergraduate curriculum policy documents focus on communication skills, leadership and autonomy. Despite this, the level of control over learning environments seemed fairly low for learners and tutors alike, with an apparent dependency on external, organisational sources of control and feedback. It could be inferred that the espoused paradigm shift towards transformational pedagogy has not yet been fully conveyed to medical students.

THE ROLE OF FEEDBACK

The challenge and critical feedback components of the GP training system were balanced by the pedagogic approach, warmth, humour and enjoyment evident in all observed sessions. Respect for peers was scored higher by the sample than respect for the teacher, suggesting peer-learning and support was highly valued. Attitudinal features were assessed and it seemed respect for and of patients was transferred into respect among peers. The tutor explicitly encouraged good formative assessment skills, such as use of questions rather than suggestions for change (Jones 2007: Appendix 1) in case discussion.

Feedback in Kungfu may have been perceived as criticism, which could lead to loss of face, to be avoided in Chinese culture. When the master noticed students' experiencing difficulty he increased the demonstration or intervened physically, offering just a few words or sounds, rather than detailed feedback. Tone and volume were adapted by the master in relation to the personality (and perceived needs) of the student. Western students desired more feedback, especially praise and correction from the master than he felt was necessary.

The 5Rhythm pilot and case study confirmed that when teachers noticed something about an individual it was turned into feedback for the whole group. There was no summative assessment; formative assessment focused on the present, on what could be done and never on criticizing individual performance. Learners accepted they may not be noticed and trusted they would be noticed if and when struggling. When "doing well" the tutor

would praise the group. The perception of being cared-for may have been of more significance to dancers than of individual care-giving by teachers.

The undergraduate tutor invested extensive effort into providing questions and answers in the form of a quiz. This was aligned to strategic approaches to learning by students and a desire to engage, evaluate learning achieved and provide helpful tutor and learner feedback. This form of pedagogic care did not seem to be fully recognised by learners.

BENEFITS OF THE FORMATIVE PEDAGOGICAL APPROACH ADOPTED

The notion of individuals' being as comfortable as possible whilst managing uncertainty seems key to the process observed in the GP case study. Peers and tutors were used to explore possible actions to manage risk and uncertainty. These emotional dimensions seem to be used to reduce "unconscious competence" (Friere 1998) less valuable in such emotionally charged working environments. There was the added value of explicitly recognising the transferable skills of sophisticated judgement-making in the classroom to professional decision-making (Hammersley 1997:406)

The high level of trust in expertise of the kungfu master enabled learners to develop their skills with limited risk of injury. Shifu expressed care by adapting the level of complexity (scaffolding) to increase the likelihood of success and thus self-esteem of the learner.

The self-directed 5Rhythms practice provided high levels of learner control and choice. Learners reported high levels of transferability between the experience and realities of daily life. Difference and uncertainty seem to be tolerated and explored.

BROAD DESCRIPTORS IN RELATION TO RESEARCH QUESTION THREE: HOW MIGHT THE DELIBERATE USE OF PEDAGOGICAL RELATIONSHIPS IMPACT ON THE EFFECTIVENESS OF FORMATIVE ASSESSMENT?

The comparison between the four case studies suggested that features of sustainable formative assessment were most evident in 5Rhythms and GP education. Sustainable formative assessment provides frameworks, exemplars and principles that engage and empower learners to continue to self-assess and or provide effective feedback to peers. It

may be inferred that such sustainability would optimise the potential for learners choosing to utilise tutor feedback and principles in the short and longer term. Evidence of reciprocal relationships/caring; students taking responsibility for their own learning and shared understandings was also highest in 5Rhythms and GP and lowest in the undergraduate case study. A similar pattern was identified regarding evidence of emotional awareness, management and intelligence being promoted and used within the learning environments.

SECTION 3: THE POSITION OF EMOTIONAL INTELLIGENCE WITHIN FORMATIVE PEDAGOGY

Assuming operationalization of the emotional dimensions of formative pedagogy requires a capacity to make use-of-self. Arguably emotional intelligence of educators needs to be deliberately enhanced through professional development strategies. The extent to which emotional intelligence has been explicitly modelled and developed as part of the curriculum or even the hidden curriculum differs in the four cases. Figures 9:1-9:4 highlight differences inferred from the pedagogic strategies (on display) analyzed against the regulation, recognition of self and others model of emotional intelligence offered by Goleman 2001:28.

SUMMARIES OF EMOTIONAL INTELLIGENCE ON DISPLAY

Both GP and 5Rhythms teachers were explicitly expected to recognise, regulate and use their emotional responses within the process of their pedagogic development. The GP tutor was observed modelling the monitoring of emotions, her own and others', through questions, such as, "*are you comfy with that?*" and demonstrated awareness of conflicting feelings of annoyance and empathy with trainees (I/d). The 5Rhythms tutors and dancers consistently used emotional terminology. For example, verbal exchanges, before and after the classes, were rich with statements linking the body's physical capacity to capture, express and manage emotions; demonstrating self-awareness, empathy and emotional safety. The pattern emerging from these findings suggested affective dimensions and EI were more evident and deliberately utilised in 5Rhythms and GP training.

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Again, teachers in both, Kungfu and undergraduate EI grids, 9:11 and 9:13, had much in common. The former focussed on physical and spiritual awareness with limited expectations that characteristics of EI would be actively displayed. Rule-following behaviours, such as obedience and respect for the expertise and Shifu's right to lead, were apparent. Yet both Shifus were free to express their concerns to learners. For example studying kungfu and smoking are incompatible, but regulating such paradoxical behaviours has not always been possible in the west. Their apprenticeship had empowered them to adapt to or control the immediate learning environment. Strategies identified included role–modelling, and repetition (Shifu) or becoming like a father (Shifu A), arguably examples of culturally appropriate formative pedagogy. They always responded "*from the heart*" (I).

EI "*maps onto professionalism...intra and inter-professionalism skills and attributes recommended by the GMC*" (Lewis et al. 2005:342). A curriculum of the emotions and formative pedagogy could enhance development and display of EI earlier in medical student learning careers and form more effective relationships with patients and colleagues.

FIGURE 9:10 GP

SELF	OTHERS

	Self Awareness	Social Awareness
RECOGNITION	*Comfortableness* measures Emotional language evident "*I do worry but comfy on the edge*"	Monitoring and empathy Peer learning valued Negotiated curriculum " Helping" Learner emotions "*running high*"
	Self Management	**Relationship management**
REGULATION	Emotional work rate high Emotional labour valued Actively promote learner control Manage own agenda to promote learner needs	Deliberate relationship building " friendly" approachable Active and transparent Parallel to Profession Laughter and enjoyment present High levels of engagement Shared language and understandings

FIGURE 9:11KUNGFU

	SELF	OTHERS
RECOGNITION	**Self Awareness** Embodied physical awareness and control Self confidence in own expertise very high Self-esteem linked to wider practice of kungfu and respect for own Shifu Researcher inferred disappointment - not named	**Social Awareness** Governed by set rules, hierarchical Awareness of cultural differences in China Kung Fu "*very serious*" *high stakes* "train the heart" Use of martial arts films to culturally inform learners Student control limited Responds to leaner needs – not negotiated
REGULATION	**Self Management** Training leads to mastery therefore certainty re pedagogic abilities. Master "*continues to learn*" as role model Achievement drive high Self esteem high linked to student performance	**Relationship management** Prescribed by traditional - Respect obedience & devotion required Formative assessment implicit not shared with learner Apprentice model mastery Teacher- centred caring for safety and scaffolding learning Role model and demonstration are important pedagogic tools

	SELF	OTHERS
RECOGNITION	**Self Awareness** *Comfortableness* measures Emotional language core Personal ego acknowledged Constant & transparent challenging questioning self and others and	**Social Awareness** Active use of own emotions to manage Own experiences used to empathise – translate into group feedback *"I wonder if they are getting what I hope they are getting."* (I)
REGULATION	**Self Management** Emotional work rate high Emotional labour lower -authenticity valued Dancing into the group to check own emotional responses	**Relationship management** With the group in the context of the practice Hierarchy actively minimised Welcoming the uncomfortable Multiple modes of trusting, self, others, the practice, own body

	SELF	OTHERS
RECOGNITION	**Self Awareness** Self confident – teacher & researcher Investment in success Understated emotional responses Limited articulation of negative emotions high emotional labour Creative pedagogic responses Monitoring own performance sensitive to learners opinions	**Social Awareness** Empathy with first years Recognised outcome orientation Maximised formative feedback to group Unable to criticise group when patient present – professional constraints. Role of faculty and curriculum Teaching -cultural changes abounded
REGULATION	**Self Management** Achievement drive high Self control emotional labour high Traditional control "Not my style" Responsiveness and problem solving	**Relationship management** Maintain classroom discipline Limited control – part of faculty Limited opportunity to build what is recognised as a relationship by learners Enjoyed / team work (PBL) in later years Responsive to and provided "cues" for success

SECTION 4: DISCUSSION OF KEY FINDINGS

As outlined in earlier chapters, Boud identified three double duties associated with sustainability of formative assessment, while Jones (2007) identified another two. During this study, exploring potential methods for managing these competing demands another double-duty emerged, especially in relation to the undergraduate case study where *Teachers must be learner-centred (care about the needs of learners) without experiencing or expressing their own feelings or emotions.*

The display rules in the undergraduate study constrained the teachers' authentic expression of negative emotions such as shame, annoyance and disappointment in students' behaviour when a patient was present, arguably requiring emotional labour. A senior member of faculty visited to express disappointment on behalf of the HEI and profession. Seemingly, policy, infra-structures and relationship to the institution and medicine was a higher priority than development of sustainable learner-self/otherawareness in the moment.

The specific emotion eliciting behaviours of the event were externally regulated rather than used to enhance self-regulation and EI. An opportunity to enable learners to explore their emotional response, For example consider the patient experience, develop empathy for the feelings of shame experienced by their lecturer or their peers, was not explored. It seemed lecturer and peers responded to the expectations of emotional silence emerging from the traditional community of Practice (COP) and the hierarchical institutional model. Arguably, reflection on the event might have provided opportunities to deepen the emotional epistemologies of learners (Brew and Beatty 2004), enhance "personal qualities" or gain cognitive/affective insights through experience (Wiliam 2009). Opportunities to benefit from transparent expectations, authentic communication and arguably the human relationship between students and M were lost to the system (Fenwick 2006).

This lecturers' exposure to emergent ideas from educational literature appears to position him between two paradigms. M faces double-duties and models how behaviours can be controlled through external rules rather than through development of selfawareness and self-management. Despite having capacity to recognise a range of negative emotions (for example shame, disappointment, articulated during the interview) and having demonstrates skills of engagement and empowerment the dominant display-rules seem to require emotional labour rather than formative pedagogy.

Although some commonality emerged between Kungfu and undergraduate case studies, the findings suggest that the lecturer seems less empowered to act when recognising

emotional discomfort. Shifu and the students seemed to concur about expectations and work within an, albeit tacit, learning contract tightly bound by a cultural tradition that was not seeking to change. It did not seem problematic. However, the dissonance between an undergraduate lecturer, who had himself been trained in a transmission learning context and more recently embraced transformative paradigms, was far greater. The learning contract seemed to exist between the students and the institution.

Might it be that that the current implicit learning contract for undergraduate programmes lacks the clarity needed to negotiate the paradigm shift away from a transmission culture towards beliefs, dispositions and behaviours associated with transformational modes of pedagogy? As policy shifts away from traditional, hierarchical medical education, might the unspoken rules of emotional discourse and the hidden nature of emotional development within the curriculum be insufficient to develop sustainable formative pedagogy? Thus the emotional learning culture in large lecture theatres may be inhibiting reciprocal relationships and decreasing the effectiveness of formative assessment strategies. Arguably, this could be addressed by explicit and supported development of the emotional intelligence of the learners.

SUMMARY

This chapter identifies a range of features which influenced teacher and learner perceptions of pedagogical relationships. These included the transparency of the learning contract, reciprocal caring (mutual trust, respect and caring), display-rules which encouraged authentic expression of emotions and sufficient emotional intelligence to make use-of-self in giving and making effective use of feedback. The emotional climates found to shape pedagogic relationships were influenced by formal or informal policy frameworks and degree of mutual understandings about the role and nature of feedback within the studies.

It seemed three of the four case studies were not struggling with perceptions of pedagogical relationships and that the prevailing emotional cultures and environments aided the effectiveness of learning through the feedback practices adopted. For the undergraduate study, perceptions of pedagogical relationships, the implicit nature of learning contracts and strategies for development of acceptable professional behaviours (by students) were more problematic. There was less evidence of reciprocal caring and shared understandings of formative assessment between individual teacher and learners. Findings suggested that many of the potential benefits

of formative pedagogy were not yet being realised. The medical lecturer appeared to be experiencing numerous doubleduties, which could hamper the sustainability of formative assessment. Sustainable formative assessment would improve learner capacity to self-assess, critique and tolerate uncertainty – skills found to be key for patient-centred care and post-graduate development, for example, GP training.

Chapter 10: Deliberate use of reciprocal pedagogical relationships to enhance formative assessment

"While anxiety is an emotion playing a determining role in learning possibly an even greater role is played by love" (Friere 1996).

Here following a synopsis of arguments that reciprocal relationships are highly significant and warrant greater attention, ideas relating to research question three: how deliberate use of pedagogical relationships might impact on the effectiveness of formative assessment – are summarised. Then suggestions for change are structured in three parts: learning from other case studies; implementing ideas from other disciplines then finally principles and applications: developing a balanced curriculum for formative pedagogy.

THE ARGUMENT SO FAR

Students' use of feedback is heralded as key to effectiveness of H&PE. Methods for developing and deploying skills, knowledge and dispositions for managing the affective dimensions of teacher-learner relationships, likely to influence take up of feedback, have however, remained tacit components of a hidden curriculum. This study challenges traditional beliefs that expression of emotions by educators generates uncertainty, and increases risks for educators. As Kernick (2002:107) suggested an adaptation of "The Stacey Diagram" (see figure 10.1) can illuminate the argument that we have reached the limits of the current rational orthodoxy, need to accommodate complexity insights and draw on a range of theories to create a new meta-view. The argument in this thesis is that we need to develop learners able to cope with the uncertainty of the affective dimensions of teaching and learning, rather than avoiding them.

The findings of this study endorse the potential of a more balanced curriculum that includes awareness and management of the emotions. Successful implementation will require policy changes that minimise obligatory language and double-duties though clearer guidance or piloting of models for transparent relational caring. Introducing an explicit focus on EI, initially for faculty-development and then, via role-modelling and experiential teaching strategies, the next generation of professionals could encourage and support whole-person learning.

The Complexity of Health Care

Disagreement

High — Chaotic

Zone of complexity

Balanced epistemologies and curricula that recognise rather than avoid the significance of relationships on AFL and cope with paradoxical double duties

Simple

Low —

Low — *Uncertainty* — High

More planning and control
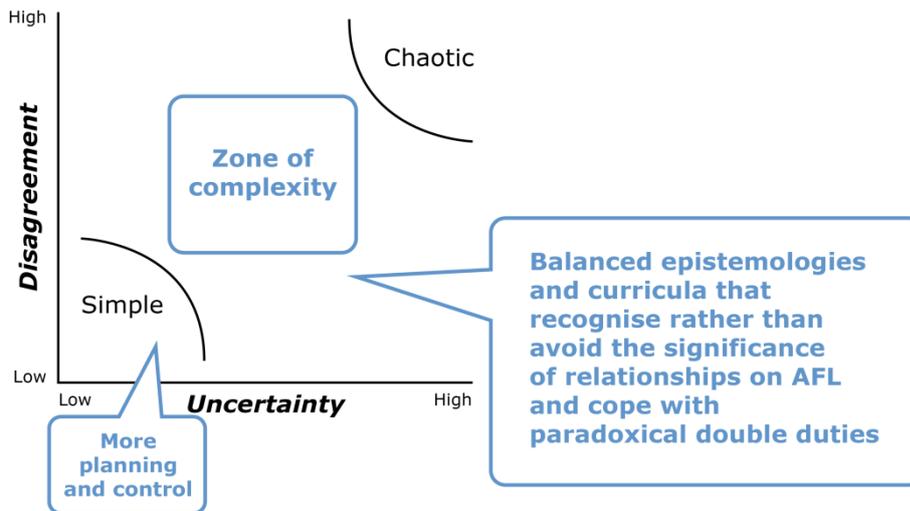
Revised curricula and support structures could promote emotional cultures which provide HEI staff with opportunities to recognise, articulate and manage the emotional demands of day-to-day encounters (their own and others) and make greater use-of-self. This study has underscored how in supercomplex environments characterised by inherent double-duties, capacities to form and manage reciprocal relationships are likely to increase learning and decrease stress. Through explicit learning contracts that acknowledge reciprocal responsibilities for learning, students can be empowered and enabled to act on feedback in the present and enhance their future ability to self-assess (sustainable self-assessment). Thus, educators can use formative pedagogy to enhance the effectiveness of feedback.

The findings suggest three of the four cases studied demonstrate cultures of relative emotional harmony (matches between displayed and felt emotions with display-rules) and limited emotional deviance (displayed and felt emotion match but don't fit organisation display-rules). This chapter offers suggestions for addressing evidence of some emotional dissonance (mismatch between displayed emotions the display-rules and authentic feeling) identified in the undergraduate medical setting. Primarily, suggestions promote staff development strategies which embrace the 3Rs (responding,

reciprocity and relatedness) and explicit development of use-of-self to reduce emotional dissonance and associated stress. These instrumental outcomes are designed to address the dilemmas highlighted in "The breathing heart and the art of lecturing" case study through promotion of formative pedagogy.

Implementation requires re-consideration of affective dimensions of HEI roles and responsibilities. Deliberate development of the skills and dispositions necessary to form and sustain reciprocal relationships no longer need be considered heroic. One strategy suggests "filching" process-oriented elements of curricula familiar to for example family therapy and school leadership to complement the technical and practical, conceptual and practical modes of knowing well developed in H&PE.

HOW MIGHT RECIPROCAL CARING FOR EFFECTIVE FORMATIVE PEDAGOGY BE INTRODUCED INTO H&PE?

Newman (2005) advocates teaching educators to be "*fully human*":"to act *wisely"*. Assuming wisdom shares characteristics with emotional intelligence, being fully human requires a degree of self-awareness and empathy for others.

Introducing explicit learning contracts, which acknowledge parallels between reciprocal relationships, for instance as components student-centred learning, and medicine, patient-centred care in medicine could awaken understandings of the affective dimensions and paradoxical demands of professional development. Transparent staff development contracts could clarify expectations of teacher and learner behaviours and relationships with potential to reduce the negative impact of emotionally silent cultures. Lecturers empowered to make use-of-self and the "*stage of here and now*" (TurnbullJames and Collins 2008:122) can contribute to development of emotional relativism within learning environments and demonstrate professional behaviours parallel to those expected of, for instance, doctor-patient exchanges. Inevitably, managing to care when teaching large groups and delivering long-term curricula pose specific challenges. Potentially, active implementation of revised and explicit learning contracts, which humanise lecturers, could engage and empower students to encounter and manage personal responsibilities and manifest reciprocal respect, trust and care.

INTEGRATING RESPONSIVENESS, RECIPROCITY AND RELATEDNESS INTO STAFF

DEVELOPMENT STRATEGIES

Despite medical education policies adopting transformational paradigms, the lecturer having understood and applied these aims, the 3Rs were least evident in the undergraduate study. Students seemed less aware of this paradigm shift, expressing expectations aligned to the transmission model of the Kungfu study i.e. seeking instruction, certainty and discipline from teachers. Unlike Kungfu learners, they demonstrated less trust, respect or, obedience in relation to the lecturer in the room. Only in the undergraduate study could a series of disconnections (Haidat et al. 2005) be inferred among:-

- old and emerging pedagogical models;
- the teacher and their own emotions (self-awareness and self-management);
- individual teachers and the student groups;
- peers (individual rather than collective responsibility); and
- under-graduate and postgraduate (as represented by the sustainability of GP training) models of professional development

Identification of such disconnections helps suggest strategies for managing feeling and display rules, which may have generated yet another obligatory double-duty: teachers must be learner-centred (care about the needs of learners) without experiencing or expressing their own feelings or emotions.

Thus, strategies require interventions that enable educators to ascribe new meanings and develop shared vocabularies for articulating emotions associated with learning experiences (Turnbull 2000; Wiliam 2009). The propositions are aligned with Heron's (1992:16.) call for consciousness development, requiring capacities for "indwelling" dependent on self-awareness and Boud's (2005) calls for new thinking by HEIs.

The essence of these recommendations is for curriculum designers to revise teacher development strategies and for policy makers to find alternatives to obligatory language (musts and shoulds) in policy and guidance documents. Revised curricula could include deliberate facilitation of emotional intelligence and capacity to perform emotional labour appropriately. HEI and medical schools can create new spaces and networks to support changes away from cultures of emotional silence and unsustainably neutral emotional

stances (Turnbull 2008). Such investment of time could enhance relational caring and improve formative assessment, both processes considered to have the biggest effect on adult learning (Nicol 2006).

FILCHING FROM OTHER CASE STUDIES FOR USE IN HIGHER AND PROFESSIONAL EDUCATION

FROM GP TRAINING

The GP training culture cultivates and role-models trusting, respectful relationships towards the profession and individual speakers in training events. Investment in process and collaborative rule-building appears to enhance engagement and empowerment that supports open feedback mechanisms and retains space for transmission and retention of content. Arguably, a learning contract allowing, empowering and role-modelling appropriate expression of authentic emotions offers learners alternative ways to control their behaviours, for example, in response to boredom in the classroom. An explicit shift away from emotionally-silent cultures, with legitimate space for support from educator colleagues, could empower lecturers to explore and convey their own feelings and provide alternative strategies to the suppression of negative emotions, such as guilt associated with transitional emotional relativism to emotional relativism.

Benefits of harnessing parallels between patient-centred medicine and relational-caring in the classroom are recognisable in GP training, where considerable emphasis is placed on process and use-of-self. Teachers openly acknowledge uncertainty and role-model use of intuition and awareness of discomfort. Models of training GPs might suggest a direction for change in professional educational programmes, such as introducing responsibilities for self and towards others (peers and tutors) earlier in the education journey to increase learner capacities for sustainable self-assessment and learning strategies. Investment in negotiation and relationship building skills results in explicit, mutually-understood learning contracts and the reciprocity and responsiveness evident in the process-rich GP approach.

GP tutor-training has enabled them to tolerate GPSRs' discomfort about change, express authentic emotional responses to groups, and perform emotional labour without

demonstrating negative or agitated feelings about learning events. Adapting the GP training strategy more widely in universities could generate protected spaces for reflection on the emotional impact of learning events among peers. This could activate basic emotional intelligence, authentic communication and personal qualities early in the learning curve. Then, within a spiral curriculum, learners would *revisit basic ideas repeatedly*" (Bruner 1960). Self-awareness and self-management could be re-applied at each new level of professional development or specialisation. Potentially, the experience of negative or agitated emotions, requiring emotional labour (in this study only expressed to medical faculty and researcher by the undergraduate lecturer), could be lessened. Educators could become less constrained by the residue of cultures of emotional absolutism, as display and feeling rules become modified.

FROM SHAOLIN KUNGFU

It seems that the albeit, tacit learning contract and form of pedagogic caring identified in the Shaolin case study are well-suited to Shaolin mastery traditions defined by obligation and collective harmony. The high levels of reciprocity and trust based on clearlydelineated roles generate successful outcomes. Physical safety is optimised by this teacher-centred approach. Students obey expert masters and experience rewards in line with their personal goals of enhanced fitness and martial arts skills evident even to the untrained observer. Undoubtedly, parallel aspects of this learning culture, identified in the undergraduate study, remain fit-for-purpose in some areas of medicine, but not all. For example, where certainty and learning from repetition might save lives, a transmission culture, as works for Kungfu, may serve well. However, this model, characterised by a flow of relational caring from master to learner and respect and obedience towards the master may be less suited to policy directives designed to develop creative, patient-centred, autonomous professionals able to work collaboratively and respond to supercomplex conditions.

The culture of Western medicine is not afforded the clarity of Chinese cultural display rules of renxing and quanxi. It cannot assume students will act on teacher feedback and repetition, to improve performance. It may be timely for professional education in general and medical faculties in particular, as they adapt to new conditions and educational concepts, to address dissonance between student desire to obey and follow lecturers with aims of engagement, empowerment and sustainable self-assessment.

Medical educators, faced with confused student perceptions, may experience helplessness, ambivalence and despondency having themselves been educated traditionally but re-trained in learner-centred paradigms.

With the certainties, respectful hierarchy and obedience that characterise Shaolin Kungfu come fewer double-duties. Perhaps the lesson from this study is Shifu's caring intention, overriding the desire of Western students to "*punch and kick*", by patient promotion of learner "*confidence, courage, discipline, self-esteem and self-respect*" (QT/A).

LEARNING FROM 5RHYTHMS

5Rhythms exemplifies self-directed learning and transparent learning contracts, where students choose to utilise group feedback to meet their individual needs. The 3Rs are in evidence between students and teacher. The teachers' role is facilitation, "*holding the space*", remaining self-aware and creating a framework for learners to develop selfknowledge. The system encourages self-directed learning without reliance on individual teacher feedback but by learning from experience, group and peer feedback. Learners demonstrated high value control appearing empowered to adopt deep approaches to self–development and free to question definitions and terminologies. They take responsibility for their own development and use a shared vocabulary with a culture of emotional relativism and associated resilient dispositions and sustainability.

Students are encouraged to practise alone; autonomy is achieved through access to and understandings of a published framework. These teaching approaches seem well suited to a system which promotes authenticity rather than certainty and precision. The rules are predominantly principles for self-regulation and community engagement but they map neatly with Brotheridge and Grandey's (2002) conceptualisation of dispositional development of teachers (presence, mindfulness, self-care, the capacity and strategies to manage one's own emotional responses). 5Rhythm teaching strategies of holding the space, use-of-self and whole group feedback might enhance events designed to promote symmetrical reciprocal caring. They could prove valuable for undergraduate teaching when certainty is not possible but opportunities for development of the professional-self, professionalism and capacities for leadership and teaching abound. For example, deliberate exploration of parallels between student and patient empathy; respect for

peers and teachers; development of mindfulness through self-awareness, and management of own learning.

Problems of forming relationships with large groups seem less familiar for 5Rhythm teachers, who trust their own processes and self-awareness to great effect, Such as rolemodelling feeling-rules based on articulation of authentic emotion (albeit mainly through movement). Findings suggest the approach promotes autonomy, creativity and capacities to tolerate uncertainty. Might mirroring the negotiation of intentions, rolemodelling and appropriate self-disclosure of this model of formative pedagogy reduce the emotional dissonance suggested in the undergraduate case study? Transparent affective processes and explicit contracts of mutual respect could help set the mood, increase perceived learner control and choice, self and peer-regulated participation and behaviour in each learning episode. Thus, lecturer M would be freed to feedback to the whole group his feelings of embarrassment due to rudeness (students chattering) and pleasure (in the respectful behaviours of the majority) when a patient was present.

Implementing ideas from other paradigms and disciplines

Boud's (2005) call for HEIs to reduce the impact of double-duties might be addressed by recognising educators as learners and recasting policy changes and guidance documents as feedback on gaps in provision. One such gap is the emotional dimension of learning, which could be addressed with reference to methods, models and strategies garnered from the evidence base, practical epistemologies and exemplars of practice from other disciplines. The emerging instrumental ideas predominantly rely on deliberate recognition and application of the emotional dimensions of learning such as Kasl and York's (2002) balanced epistemology and Zhang et al's (2011) curriculum of the emotions. New curriculum design could adapt models from social work or school leadership, for example Fook's (1993) model curricula for developing and using relationships including experiencing empathy, supporting empowerment and critical awareness or Shaw's (1996) ideas for development of professional selves capable of emotional filtering, mediation and guidance for professional decision making.

Authors from the field of EI such as Chernis and Goldman (2001) highlight the potential for group-work to elicit, identify and articulate individual emotional responses, including trust, attitude, sense of identity and appropriate professional action. Research into school leadership training highlights the importance of praxis, and re-configured workplace spaces for peer support as strategies for overcoming the dominance of emotional silence or absolutism. Such cultural shifts towards emotional relativism need programmes

promoting sustainable predispositions, such as self-awareness, for example facilitation of group spaces for storying and re-storying painful emotional experiences (figure 3:5).

Authors promoting "caring dispositions" increasingly recognise the importance of reciprocal caring rather than unbounded unreciprocated scripts, often drawing on practical theories of effective parenting which do not encourage dependency. What follows are summaries of principles and application that have emerged from tracking the hypothesis, first outlined in chapter one that:

> "Formative pedagogy- deliberate use of pedagogical relationships to enable learners to identify ways to move forward in relation to their own understandings of their world, the learning context and the negotiated outcomes of particular learning episodes - would enhance formative assessment, which in turn would significantly improve learning" (Jones 2007:42).

PRINCIPLES & APPLICATIONS: DEVELOPING BALANCED CURRICULA FOR FORMATIVE PEDAGOGY

This series of principles and exemplars drawn from emergent approaches within my own professional practice as a medical educator are offered to guide and shape staff development strategies for promoting formative pedagogy by encouraging reciprocal relationships. They are described initially for faculty development of staff development specialists with the assumption that participation in discourses and experiences of formative pedagogy themselves they will be better equipped to demonstrate and cascade formative pedagogy to future generations of medical students.

INTRODUCE AND SAFETY-NET EMOTION ELICITING EVENTS.

As part of a spiral curriculum, group-work processes such as Beatty and Brew's (2004) model for discovering self-awareness, or Wiliams' (2009) curriculum model can be introduced to encourage articulation of emotional experiences of teaching and learning. These processes support individuals to become increasingly self-aware and develop useof-self as a resource.

The importance of developing a "safe skin" for critical reflection is paramount to overcome the risk of perceived attack, or professional vulnerability associated with inappropriate self-disclosure. Facilitators of emotion-eliciting group work need to pay

attention to negotiating ground-rules for active listening and constructive feedback to maintain trust, openness and honesty (see exemplar below).

One emergent example of safety netting is for educators to be taught acting skills for the moments when they need to undertake emotional labour. Alongside the proposals below for reducing the need for inauthentic communication actively teaching some deep acting skills (Brotheridge and Grandey 2000:18) would, when necessary, enable educators to:

- Fake emotions not felt
- Hide emotions felt and
- Manage emotions to meet the expectations of the working environment.

ARTICULATE POLICY AND GUIDANCE TO MINIMALIZE DOUBLE-DUTIES:

In the supercomplex context of medical education it is unlikely that double-duties will disappear. Acknowledging paradoxical demands could reduce stress experienced, as medical educators are freed to articulate pedagogical experiences and emotional impact of competing priorities. Addressing double-duties may support cultural changes away from potentially damaging emotional silence. By developing emotional intelligence and promoting reciprocal caring, at least the double bind articulated in this study would be minimised, that is, teachers would be enabled to care appropriately about learners and express their own emotions.

CREATE CONDITIONS FOR ACTIVATING POSITIVE EMOTIONS

Conditions for experiencing positive emotions, such as happiness, pride, excitement and calmness can be enhanced by reducing risks of guilt, fear, shame, sadness (see figure 2:3) or of being labelled heroic, weak or motherly when demonstrating caring for learners.

The development of synergistic and potentiated mentoring arrangements has been shown to require a trusting relationship (Marsick 2006) and may also reduce isolation of those new to transformational pedagogy. Allowing mentoring, supervision or teaching arrangements to fall to chance or remain part of a hidden curriculum misses significant opportunities in which explicit communication and relational skills could be re-visitied as

part of a formal spiral curriculum. New spiral curricula professionalism could be adapted to include use-of-self and EI development.

REDUCE ISOLATION OF EDUCATORS AS LEARNERS

Acknowledging the benefits of enabling and encouraging teachers to reflect and communicate authentically together and involving participants in development of ground-rules for supervisory or developmental groups would probably provide emotion eliciting events (Macintyre 1999:53) or the components of emotional experiences called for by Wiliam (2009). This in turn provides opportunities to develop self and other awareness and build up a lexicon for articulating emotional experiences in preparation for work with educator-learners.

Explicit integration of experiential, presentational, propositional and practical (Heron's 1992 whole person approach) learning opportunities into staff development programmes could provide incentives for educators to recognise the value of relationship for the development of self-regulating emotionally intelligent learners.

Explicit articulation and teaching of the four abilities of emotional intelligence - perceiving emotions, facilitating thought, understanding and managing emotions (Lewis et al. 2005) would be of significant value to learners and their future patients. Staff developers could make explicit links between discussions in the classroom and reflective learning in the workplace.

EMPOWER AND ENABLE THE DELIBERATE USE OF MINDFULNESS AND USE-OF-SELF

Boud (1999) and others highlight the risks of reflection as a recipe -applying only rationalised techniques rather than adapting reflective activity to include learning from the emotional processes experienced. It is possible to draw on experiential models and curricula designed by professions which already utilise self-knowledge and adapt them for professional or medical education purposes. Individual and group reflection events have significant potential for the development of self-awareness, empathy and relationship-building skills. Staff developers could choose to dwell on the articulation and discussion of feelings (welcome and unwelcome) as such exchanges can support the development of emotional intelligence.

RECONCEPTUALISING LEARNING CONTRACTS TO INCLUDE 3RS

Time invested developing shared understanding of ethics-of-care as part of negotiated learning contracts, which are relevant to present learning environments/events, and future roles and responsibilities, could pay dividends. For programmes such as medicine, which use multiple educators, it is important to explore overarching principles of relational expectations towards and from a range of educators, together with the behaviours of learners. Clarifying expectations and rationalisations would increase opportunities for self–assessment, self and other awareness and peer accountability. Opportunities for authentic expression of emotion by educators and students could offer professional skill development opportunities to learners awakened to the impact of their behaviours on others.

The recent introduction of medical student charter (http://www.gmchttp://www.gmc-uk.org/education/undergraduate/professional_behaviour.aspuk.org/education/undergraduate/professional_behaviour.asp accessed August 2013) could generate potential for change. However, at present the key focus is upon student behaviour in relation to the profession and the public, rather than on addressing personal accountability for learning to, from and with individual tutors and peers.

A period negotiating learning contracts would provide an ideal opportunity for enabling learners to understand the paradigm shifts in medical education and their contribution to relationship building, reciprocal caring and responsiveness. The role and forms of feedback and formative assessment and the benefits of utilising feedback for learning could also be made explicit at this time.

ENHANCE LEARNER CONTROL – EMPOWERMENT

The introduction of learning contracts, with explicit, negotiated and non-negotiable standards and expectations could in theory empower learners to evaluate the quality and style of their learning experiences (Lemiuex 2010). Developing capacities to authentically communicate positive, negative and agitated emotions would provide increased opportunities for change as along with control comes a degree of responsibility. For example, learners could share responsibilities for discipline and focus within learning environments or for seeking and using clarification and feedback. In medicine there may be significant benefits for explicit exploration of the impact of group behaviours on peers and teachers.

Use emotional awareness to increase the use of feedback by learners.

The GP case study provided an exemplar of how to utilise personal feelings of discomfort to develop discourse and explore uncertainty. Students can be taught to provide feedback in ways that are most likely to be taken up by their peers, teachers or ultimately patients and colleagues. Skills for giving and receiving emotionally-informed feedback may be a valuable component of a spiral curriculum.

Explicit understandings of the effort and positive intentions of tutors or peers in providing formative assessment may encourage learners to make active use of and openly explore the impact of feedback on their learning.

### APPLICATION AND DISSEMINATION OF IDEAS

Reflective exemplars

In this section I aim to provide examples, of how I have integrated these findings into my own pedagogic practice, in the hope that this will provide insights for others seeking to enhance the capacity for formative pedagogy, their own and others.

My current role, as course coordinators on an MA in Medical Education includes teaching modules on "leading learning". I have increasingly incorporated not only concepts of emotional intelligence but activities designed to elicit emotional responses and then debrief to develop self-awareness in response to the learning event.

One challenge when developing the necessary emotional intelligence and capacity for formative pedagogy is how to design and facilitate such emotion eliciting events and then debrief in ways that enable learners to reflect on what they have learned. I share some of the models and definitions, developed in this thesis, to convey the aims of the session to; help learners understand the relevance of the activity to our learning contract; contribute towards the creation of a safe-skin and encourage buy-in from the participants. They are made aware of, for instance of Chernis and Goldman's (2001) argument that group work has the potential to elicit, identify and articulate individual emotional responses, including trust, attitude, sense of identity and appropriate professional action. We also discuss the importance of praxis, and how we might intervene to re-configured workplace spaces for peer support as strategies for overcoming the dominance of emotional silence or absolutism (Beatty and Brew 2004).

Some of the power-point slides I use in setting up the classroom discussion exercises and de-brief are outlined in the personal reflection which follows.

A series of power-points presented ahead of the exercise outlined below.

Emotional intelligence and emotional labour

Emotional Intelligence (EI)

"the ability to monitor one's own and others' feelings and emotions, and to use the information to guide one's thinking and actions"

(Salovey and Mayer 2008)

Emotional Labour

"the management of feeling to create a publicly observable facial and emotional display"

(1983:7 in Erickson and Rieter 2001, 155)

The Four Abilities of EI are

Perceiving Emotions in oneself and others as well as in objects, art, stories, music and other stimuli

Facilitating Thought: generating, using, and feeling emotion as necessary to communicate or employ feelings in other cognitive processes

Understanding Emotions recognising how emotions and emotional information combine and progress through relationship transitions, and appreciating such emotional meanings

Managing Emotions: being open to feelings, and modulating them in oneself and others so as to promote personal understanding and growth

(Mayer-Salovey-Caruso in Lewis et al 2005)

Plutchik's Wheel of Emotions
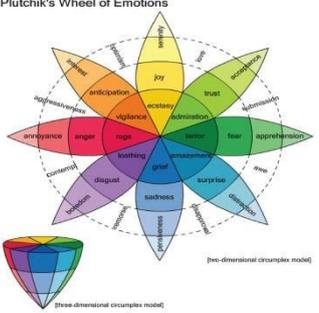
[two-dimensional circumplex model]

[three-dimensional circumplex model]

Trait or Skill?

"is limited to the abilities at the intersection between emotions and intelligence – specifically ... the set of abilities in reasoning about emotions and using emotions to enhance reasoning" (Mayor et al 2008; 514)

Both –

Skill development can be achieved through deliberate use-of-self e.g. Reflection & mindfulness

Emotional Labour

Hochschild defined as

"the managament of feeling to create a publicly observable facial and bodily display" and is done for a wage

Two modes of managing feelings *"surface acting"* and *"deep acting"*

Doing Emotional Labour

- Fake emotions not felt
- Hide emotions felt
- Manage the emotions to meet the expectations of the working environment

Beatty and Brew (2004) 4 types of display rules in organisations

1. "emotional silence" - ignoring, suppressing or wrestling to control emotions to retain the illusion of rationality;

2. "emotional absolutism" - denying the authentic self by identifying feelings as right or wrong and rewarding accordingly.

3. "transitional emotional relativism" generated temporary excursions into emotional realms often accompanied by the shame of rule-breaking and a return to emotional slience and

4. "emotional relativism" where teachers acquired *"sustainable predispositions"*

Exemplar 1: Developing Effective Leadership Unit

I invite students to relax into a self-directed Silent GROW model (based on Whitmore's 1994 coaching questions see appendix 10.2) My previous experience confirms combining this almost meditative process with a simple relaxation exercise has the potential to generate a self –directed learning experience and stillness in learners. I then combine an individual mindfulness exercise with a simple instruction to create an emotional eliciting

event with the aim of demonstrating the potential for powerful cultural shifts towards emotional relativism by promoting sustainable predispositions, such as self-awareness. My facilitation of this group space enables "storying and re-storying" of pleasant or painful emotional experiences by adapting the re-presented model below:

Model for group intensives (Beatty and Brew 2004:333)

Unexamined emotional self

Experiencing self as emotional

Restorying self through sharing of self as emotional

Connecting with the other through the emotional self

Reconnecting with the self through the emotional other

Connecting with the self and other through the emotional self as emotional knower
— deepened emotional epistemology
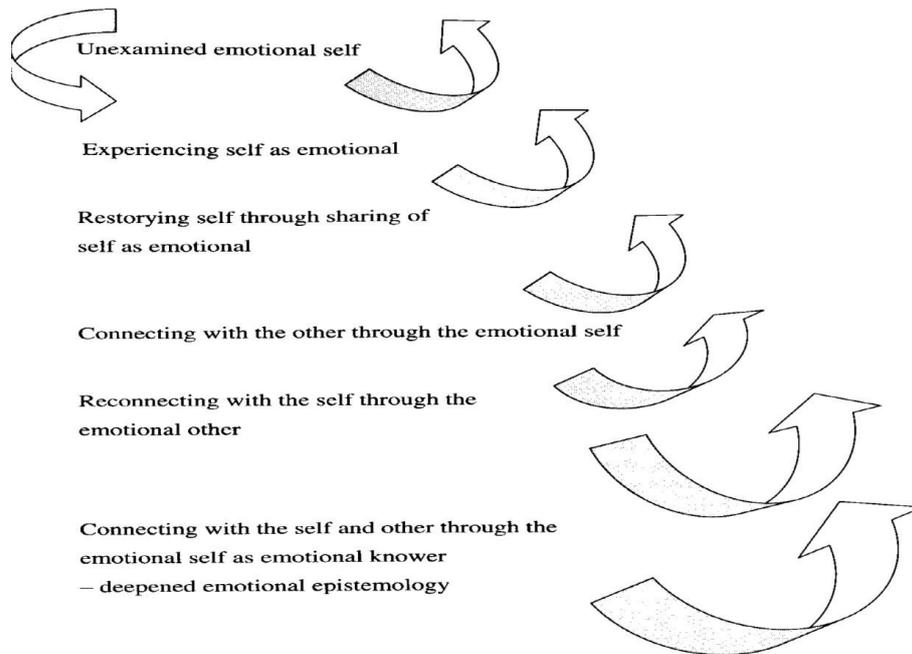
What follows is a personal reflection, using Boud and Walker's 1985 model, on a two hour "lesson" which took place on day four of a five day programme. I believe I had generated the characteristics of reciprocal caring between myself, as teacher and the learners and this reflective account exemplifies the principles of formative pedagogy in practice.

RETURN TO THE EXPERIENCE

Having established trusting relationships within the group I briefly introduced the concept of emotional intelligence as important for effective leadership (see power-points above) and encouraged discussion based on student understanding of the pre-session set reading - Emotional intelligence and nursing: An integrative literature review (Smith et al 2009). I shared with the group my intension of linking together four distinct but inter-

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related experiences designed to generate a platform for us to debrief, discuss and explore the principles of :-

Non-directed coaching

Mindfulness

Emotional intelligence and following the event Emotional

labour.

Following the silent GROW model meditation I quietly invited participants to "stay present", simply pointed to the principles of mindfulness slide and invited them to take a 15 minute mindfulness walk alone in the grounds. I expressed confidence that they would return on time and without effort, would be drawn to an object which they would bring back to the room. They were encouraged not to talk to each other.

Upon return they discussed their experience in pairs for five minutes then, with no negotiation or explanation I asked them to give away their object to the person two places to their left (random).

Returning to the larger group we discussed their experiences and how it felt to give away their chosen object (see appendix 10.3, flipchart of comments made by some of the participants). Two people had not brought back objects. I noticed others had carried and placed their object as if quite precious and these were admired by their colleagues (e.g.an aesthetic piece of moss covered bark).

I then re-introduced the slides on emotional labour and display rules in the workplace and we continued the discussion mapping their experiences today with these models and emotional dimensions of leadership issues encountered in their workplace with the explicit aim of utilising self-awareness for professional development.

Attend to feelings

I felt excitement at trialling this string of inter-related exercises and some trepidation of whether the whole process would work, though confident that I could share my feelings if the experiential learning process did not go as planned as a means of salvaging learning for the group. I felt delighted and exhilarated with the tone of the discussion and the level of emotion expressed.

I noticed, checked and explored the emotional responses of individuals when instructed to give away their object. These included guilt "but I didn't bring one for someone else";

disappointment, hurt and anger "I gave mine away but didn't get anything back" grief from the owner of the beautiful bark and a mixture of shame and use of humour by the recipient of this much valued piece.

Re–evaluate

I facilitated a rich discussion where learners displayed and expressed a vibrant range of emotions and explored the emotionality of this unexpected experience. Within this safeskin they expressed keen awareness of their own emotions. Those who felt neutral about giving away their object acknowledged their shock at what was happening for others.

I drew heavily on my experiences as a therapist as several people were close to tears. I referred the group back to our sessions on assertion, as a means of expressing what we want. This allowed the bringer of the prized piece of bark to share that she had hoped to take it home. I had to monitor how the new owner, played and teased a little but, as I suspected returned it at the end of class.

Make Associations

This exercise drew heavily on my learning through the doctoral process, on interpersonal skills filched from previous professions as a therapist and counsellor and of gentle use of questioning as a means of formative feedback. The capacity of the learners to map their emotional experiences to the models and become self-critical was evident. The discussion represented an example of re-storying emotional experiences. Several participants articulated insights and identified how they planned to modify their practice. For instance "I hadn't realised what it might have felt like for X when I.. Next time I will….". This learning event emphasised the importance of Macintyre's safe-skin, and the potential of formative pedagogy. It exemplifies Wiliam's 2009 model presented again below.

Designer process

Identify cognitive/affective insights → Synergy/ comprehensiveness → Set of components to provide emotional experiences

Trainee teacher process
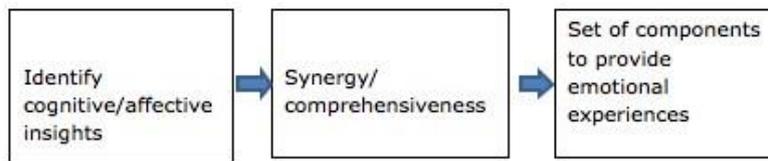
Set of components providing emotional experiences → Synergy/ comprehensiveness → Gain cognitive/ affective insights through experiences
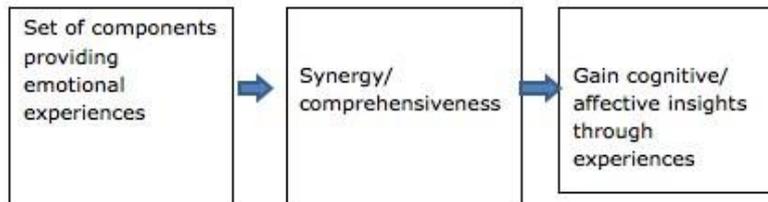
Validate –applicability to emerging model/ theme/ other learning/ practice

This session, derived from my thesis, was validated by the learners, indirectly and directly. Their verbal comments immediately following the session suggested growth in emotional intelligence and an understanding of emotional labour – for instance how the finder of the bark had undertaken emotional labour whilst attempting to squash her disappointment whilst others who felt no attachment to their found object had felt able to be authentic.

The applicability of this approach is highlighted in an extract from the reflective assignment

> *"…emotional intelligence as ability to use emotion to facilitate thought and skills …was practiced on the 4th contact day where we are all asked to go for walk and make sure we return with an item then swapped among my colleagues. Everyone was able to express their emotion and it showed clearly how we all react differently to things… our ability to manage emotion, to effectively manage feeling within oneself and others. I now understand the need to recognise your own emotion and the emotional state of others. This understanding of emotional intelligence helped me to relate better with my subordinates and also helped to achieve greater, relaxed working relationships even though the work environment is currently very stressful." Student a*

APPROPRIATE – MAKE IT YOUR OWN

I plan to disseminate findings and principles and utilise this exemplar in order to contribute to ongoing discourse within several communities of practice my own students – medical and health-care educators through submission to journals such as Medical Education (http://onlinelibrary.wiley.com/journal/10.1111/%28ISSN%291365-2923 accessed July 2014) and those involved in professional development of HEI workforce such as the Journal of Professional Development in Education (http://www.tandfonline.com/action/authorSubmission?journalCode=rjie20&page=paper#.U9_Y5rE_vLk accessed July 2014).

Exemplar 2: Formative pedagogy in action: Negotiating learning contracts with international students.

Whilst, I believe, most educators share the learning outcomes of modules or teaching events with learners do we allow the time for the learners to negotiate their understanding and buy-in to the process? I have found my increased willingness to explore, negotiate and develop shared understandings of the learner teacher contract has proved invaluable. I now use formative pedagogy when working with groups of international students. I invest time during early sessions to discuss the differences between teacher student exchanges in their country of origin and my request that they discuss, debate, question and argue with me. On one occasion I shared my concern that because they were being passive, wanting to write down my every word, my interactive style would not work. I asked a group of post-graduate nursing students what we could do and was confronted by uncomfortable silence.

I invited one student to come and sit with me facing their peers and then asked what she saw. Quietly, following encouragement she said "fish" I asked her to explain and she mimed a fish silently blowing bubbles explaining "they want to but can't speak". Everyone laughed and then they tumbled over each other to explain to me the respectful, hierarchical, predominantly didactic teacher-centred cultures dominant in India, Nepal and China. We discussed the concept of transactional and transformational teaching and my beliefs that the latter would enable them to learn more about supervision and leadership – the title of the unit. We were enabled to utilise their discomfort with the changed expectations and experiences of transformational approaches to learning and leading to consider how they might enable novice nurses to feel empowered to become more self-directed learners. Below is an extract from one of their reflective assignment later in the module.

 "*The unit helped me to gain many supervisory skills, which I was lacking in the past but essential for the future. I believe that I can use my newly acquired skills in Indian Nursing curriculum where teacher-centred learning is dominant. I hope my experiences*

from SLD unit can be a small trigger to implement changes in the field of nursing in my home country." Student c

> *The role of emotion in leading change is readily noted but as yet, not fully explored as a central focus in leadership preparation programmes (Beatty & Brew, 2004 in Beatty 2006).*

Until recently on a blended learning module entitled Educational Policy and Leadership I had delivered sessions on motivation, change and communication and spoken only briefly about EI as a construct. Now I also include an online discussion to consider two papers on Emotional intelligence (Arora et al 2010 and Beatty 2006). This enables us to explicitly re-visit emotional intelligence for the duration of the module. Below is an exemplar of my written feedback in response to a student's entry in an online journal.

> *"You are making some interesting points about two consultants. What feels important to me is that we recognise like intelligence, emotional intelligence is just a construct even though we speak of it as something real and measurable. I guess what matters, for this particular discussion, is whether self-knowledge and empathy play a role in our capacity for certain types of leadership / management. I have certainly liked people who I didn't feel had emotional intelligence and vice versa. The issue then is does liking impact on our effectiveness, in this instance to promote best teaching, learning and assessment practice in our workplaces? Then for myself, as an educator the question is if it is important how can we support people to enhance their EI?*
>
> *We can continue the debate during days 2 and 3".*

I have noted how colleagues and students on other units continue to call upon the concept and use of emotional intelligence in later modules suggesting that I am managing to influence discourses within my own HEI. I believe this final extract from a recent reflective assignment by a student highlights how learners are seeking to develop praxis and thus the influence of this doctoral study is beginning to impact on professional development their own in specialism.

> *"I would like to explore the mindfulness exercise some more… if I could gain some courage I would like to allocate a tutorial for one of my dental students and work on the mindfulness 7 qualities exercise…useful in day-to-day stress management at work. Non-judgement, patience and beginners mind are powerful*

traits of mindfulness… On reflection, I have mostly improved my self-awareness skills and left feeling eager to learn more about coaching and mentoring to become a better facilitator to my students." Student b

WRITTEN FEEDBACK AND MAINTAINING A RELATIONSHIP

A final brief example of formative pedagogy is how I expression emotion within a virtual learning environment or as part of written feedback. I make extensive use of what Hyatt (in Jones 2007) has described as "phatic" or relationship building comments. For instance "*It was a great pleasure to read this clearly expressed assignment. You have made positive use of our previous discussion and the improvement in your academic writing is noticeable*" and "*I was disappointed that you did not include the critical points you made during the classroom discussion in your account*".

Below is my response to a very positive e-mail about my skills as an educator and ability to provide feedback as a tutor which I hope values the positive comments and illuminates how the learner can utilise their feelings about the experience to motivate their own development.

> "*Whilst I am glad you found my methods satisfying and enjoyable etc try to pull back into a meta-analysis. For instance is what you are saying that I, as the tutor role-modelled creativity and engagement? This will allow you to consider what changes you can make to enhance your own ability to engage, interest and rolemodel your newfound "pleasure of professional development" Linda.*

I hope this section highlights my attempts to introduce new authentic pedagogic vocabulary and demonstrates my approaches to role model different "*habits of mind*" as advocated by Beatty and Brew 2004.

CONCLUDING COMMENTS

> *Both education and medicine are profoundly people-centred professions. Neither believes that helping people is a matter of simple technical application, but rather a highly skilled process in which sophisticated judgement matches a professional decision to the unique needs of each client. (Hammersley 1997:406).*

The significance of reciprocal pedagogic relationships was perceived differently in each case studied and emotional culture influenced their nature. Coherence between pedagogic purpose, emotional rules and culture seemed key to the understanding of AfL practice. That hierarchical, teacher-centred models optimised physical safety was understood by kungfu students and tutor. 5Rhythms and GP culture promoted selfdirected and peer-supported learning, drawing on a wide repertoire of emotional language for sharing experience. However, rhetorical changes, from transmission to transformational models of medical education may still require further instrumental interventions. Deliberate development of the emotional competencies needed for formative pedagogy could optimise the effectiveness of formative assessment and development of sustainable self-assessment capacities, professional behaviours and judgement of medical educators.

Medical Educators who have straddled transmission and transformational teaching strategies, for their own professional development, may be encountering double-duties in climates not yet suited for emotional exploration. This study concludes that transformational approaches require a capacity to build and sustain relationships, which may be unsustainable in emotionally-silent or emotionally-absolute communities of practice. Understanding why and how appropriate reciprocal relationships can influence take up of feedback and learning could significantly improve formative assessment and hence the learning of future generations of professionals.

Essentially, this study suggests changes of milieu within faculty-development departments accompanied by explicit *learning contracts.* It argues for elevating the development of emotional intelligence, by enhancing self-awareness from being part of a hidden curriculum to explicit inclusion in emotionally balanced staff-development curricula. The analysis of findings points towards the benefits of optimising authenticity except when emotional labour is necessary and that faculty development professionals could enhance these capacities as one step towards sustainable relational caring. These strategies could enable the next generation of HEI educators to develop EI, become more resilient to day-to-day experience of double-duties and develop use-of-self skills necessary for formative pedagogy. Such curricula for formative pedagogy are proposed to enhance emotional intelligence, reducing the need for, and or developing, capacities for performing emotional labour. Because by doing: "*emotion work, we learn to distinguish between the appropriate contexts for expressing or containing our emotions*" (Clark and Dirkx 2008:94).

These curricula have reciprocal caring relationships at their heart. They could enhance AfL practices by enabling students to become more self-regulatory; able to monitor and evaluate the quality and impact of work, their own and the work of others. This study

suggests educators trained in this way might add value by demonstrating dispositions, and skills highly relevant for learner-centred teaching and patient-centred medicine. This would require faculty development and human resource departments to reduce

emotional dissonance and modify emotionally-silent workplaces by generating supportive spaces for authentic, emotionally intelligent conversations and curricula.

Formative assessment in H&PE in general and medical schools in particular could benefit from explicit strategies to address the impact of paradigm changes, from traditional to transformational models of pedagogy on student perceptions of learning contracts. We need to enhance our understanding of the emotional and caring dimensions of teacherlearner relationships, especially within the context of giving and receiving feedback. Furthermore, the emotional dimensions of pedagogic relationships and learning require explicit attention within the staff development curriculum in ways that promote effective use-of-self and the 3Rs, reciprocity, relatedness and responsiveness. Academic development staff can help shape optimal emotional environments that enable educators to manage to care by supporting new curricula and also creating conditions for networking, owning and naming the emotional experiences which are equally important for implementing change. By creating the conditions for authentic conversations that process emotional experiences of educators in HE&PE settings, we can harness the powerful learning experiences of formal and non-formal formative exchanges rather than simply talking about them.

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APPENDICES

APPENDIX 2:1

TABLE I: AFTER PEKRUN 2006:320,

CONTROL-VALUE THEORY: BASIC ASSUMPTIONS ON CONTROL, VALUES, AND ACHIEVEMENT EMOTIONS

Object focus	Value	Control	Emotion
Outcome/prospective	Positive (success)	High Medium Low	Anticipatory joy Hope Hopelessness
	Negative (failure)	High Medium Low	Anticipatory relief Anxiety Hopelessness
Outcome/retrospective	Positive (success	Irrelevant Self other	Joy Pride Gratitude
	Negative (failure)	Irrelevant Self other	Sadness Shame Anger
Activity	Positive Negative Positive/Negative None	High High Low High/Low	Enjoyment Anger Frustration Boredom

APPENDIX 3:1 MOOD REGULATION TRAINING FROM BROTHERIDGE AND GRANDEE (2002:34)

Emotional Labour Scale (Brotheridge & Lee, 1998)

Duration
A typical interaction I have with a customer takes about – minutes.

Intensity
Express intense emotions.
Show some strong emotions.

Variety
Display many different kinds of emotions.
Express many different emotions.
Display many different emotions when interacting with others.
EMOTIONAL LABOR AND BURNOUT 35

Surface Acting
Resist expressing my true feelings.
Pretend to have emotions that I don't really have.
Hide my true feelings about a situation.

Deep Acting
Make an effort to actually feel the emotions that I need to display to others.
Try to actually experience the emotions that I must show.
Really try to feel the emotions I have to show as part of my job.
Emotion Work Requirements Scale (Best, Downey, & Jones, 1997)

Requirement to Display Positive Emotions Reassuring
people who are distressed or upset.

Remaining calm even when you are astonished.

Expressing feelings of sympathy (for example, saying you "understand," you are sorry to hear about something).

Expressing friendly emotions (for example, smiling, giving compliments, making small talk).

Requirement to Hide Negative Emotions

Hiding your anger or disapproval about something someone has done (for example, an act that is distasteful to you).

Hiding your disgust over something someone has done.

Hiding your fear of someone who appears threatening.

APPENDIX 4.1: A SAMPLE THAT HIGHLIGHTS THE EMOTIONAL RICHNESS USING MINUTE PAPERS TO

MONITOR RESEARCHER PROCESS.

Minute paper

Whilst watching a video clip of steel jacket demonstration I sat and watched a Shaolin monk . I burst into tears. Why? There is something so moving about the dedication, the years of training but more the gentleness I encountered in the teachers that I met. Watching the video touched me deeply and I felt profound gratitude for these encounters.

Question -What is the tension between the spectacle of steel jacket and the underlying Buddhist belief system. Am I sufficiently interested to explore this more?

Minute paper Sept 1st 2008

My planned observation didn't happen so I danced with and found it hard to quiet my mind my body moved without my will in ways it chose.

I adored a specific piece of teaching. "Find a way to see me". She demonstrated stillness, a still wave using a wonderful metaphor of the sorts of clouds that aeroplanes leave in a blue sky – effortless. Someone said you mean a vapour trail, and I felt my own. Not since the first time I heard Sue R say flowing is moving like a cat have I felt such clarity- a metaphor that will shape my five rhythms practice.

After observing B.

As I got up to dance again I worried that I wouldn't be able to move into the rhythm but I discovered I could that writing also follows waves I was writing in staccato and then in chaos. I was surrendered to the writing free using what B did as a track and moving my own body too. I felt completely relaxed. I loved B's feedback of being an unobtrusive observer. The process of ethnography in the style I am evolving really does involve witnessing, suspending judgement. It was emotional labour but well worth it. It was frustrating not to have all the data I'm really motivated to move onto the analysis

Other questions emerged like how did completing the questionnaire impact on the people who had completed it? To what extent does learning follow Gabrielle's wave theory?

Questions

Should I have quieted my mind, I was almost writing this paper in my mind but without effort, how can I harness my thoughts and be a dancer. My thoughts included Debra Meyer 2005 an instructional event but what are they tutor, teacher, mentor trainer educator? A title in the making?

A spontaneous poem scribbled on my minute paper.

> What is your name?
>
> Not teacher lest I see the purple lined gown of power.
>
> Not knower, fact giver or instructor
>
> Instruction is a distraction from learning.
>
> Perhaps educator?
>
> But is the word too long
>
> Too complex and too simple?
>
> Mentor has a comforting touch – a hand holding
>
> Enfolding an unfolding of knowledge but,
>
> Even that, my critical friend ends up
>
> Tying me in knots of not knowing
>
> What I am researching is the unnamed
>
> Opener of the proverbial can of worms
>
> The hook from past to future
>
> No sooner sated than I hunger for more.

Minute paper: Following meeting with David Boud

Having shared my research questions and title David asked what transactions I am looking at as I undertake the direct observations. Whilst being very positive about the scope he was concerned that the title did not reflect the focus – tutors perceptions of care are more central and wondered whether there might be a gap between care and emotions. He agreed that the nature of pedagogical "space" is of particular interest at present. Positive feedback re the term getting-out-of-the-wayness.

He expressed concern about using Marsick's work pointing to recent research by Phil Hodgkinson and others and his own work with Donna. Also issues with my use of evolving curricula – that could mean anything needing to find an alternative and more particular term.

His use of educational / academic language reminded me that I need to conceptualise using these terms for example My diagram is in fact a typology of learning relationships and what I am trying to do is codify the relationships perhaps with a view to producing a code of practice for supervisors using exemplar materials from other professions and also exploring the possibility of avoidance of the emotional within HE due to fear, cultural risk management etc.

Suggested I contact him for details of two peers exploring similar interests.

Care in commerce UNISW and Michelle Mulvihill using own training experiences plus expressive stories then portrayed as theatrical performances.

What are the outstanding questions for me:

How to define the relationship between FA (lit review) and pedagogic relationships clearly?

How to define care within pedagogic relationships?

Definitions of informal learning?

Minute paper after conversation with a Buddhist friend – Susanne.

Couldn't work out how "tiredness", which kept emerging from the analysis, could be couched as an emotional state. S commented that there are 5 "mental hinderences" taught in classical Buddhism

      Lust

      Ill-will

      Sloth & torpor

      Restlessness and anxiety

      Doubt.

Our conversation found many parallels between her own Buddhist practices and mine. Buddhism tends to teach in polarities but rather than good or bad there is skilful and unskilful, ignorance or wisdom. Buddhist teacher believe that naming and identifying a hindrance to your meditative practice makes it easier to achieve the open state where one allows thoughts ideas without chasing or pushing them away, moving from conscious to unconscious state. To move to a meta position or reduce the caught-upness we can experience when we try to learn.

Questions

How can I include this thinking in my analysis – it seems more relevant to the analysis of Shaolin pedagogy. Perhaps the use of luminal space between the two poles fits with Plutchik's shades of emotions framework. Would the perception of torpor, stupor and sloth as resistance be useful for handling the tiredness that emerges in learning literature and case studies?

January 2nd 2011.

APPENDIX 4:2 EXEMPLAR SURVEY

final GP relationships trainees

1. GP Formative Pedagogy Case Study - t rainees

Please confirm that you're willing to participant in this study by providing your name your name and e mail and the date of the session in the spaces below.

*1. Please provide the following information in order for me to send you the follow up questionnaire. The information will be treated in strictest confidence.

Your Name	
your e-mail	
Your phone contact number	
May i follow up if necessary?	

2. introduction and return details

Thank you for agreeing to take part in this research project. The aim of this study is to :-
> explore, develop and improve understanding of what tutors do to support learning.
> understand the relationship between trainees and tutors.
> use a method called appreciative inquiry, looking at what is working rather than wanting to criticise what is happening in any particular class.

There are no right or wrong answers to the questions in this form.

Providing your contact details confirms you've agreed to take part in the study. Your details will not be passed onto anyone outside the academics involved in my research - who will also treat your details and information as confidential The questionnaire should only take about 15 minutes
The questions relate to
> What you want/ hope to enable trainees to learn or develop
> How tutor can help trainees achieve that goal.
Most of the questions ask you to complete a sentence or to circle a number from 1-10 to indicate how your response in relation to an aspect of learning and relationship within the class. A few questions ask you to choose a specific number of boxes to tick. Please try to tick the precise number.

You may find it helpful to read quickly through the whole of each questionnaire once before completing the individual questions.

Please submit completed form electronically or print & return the completed questionnaire to Linda Jones, Thank you for agreeing to take part in this study.

Linda Jones
Principal Lecturer in Medical Education
Bedfordshire and Herfordshire Post Grtaduate Medical School
Putteridge Bury
Hitchin Road
Luton.
LU1
Mobile phone contact 07979 956360

final GP relationships trainees

3. About the class

1. Have you studied with this tutor before? Please tick one answer.

○ Yes, a lot   ○ No (first class with this teacher)

○ Yes, some   ○ No (this is my first ever Five rhythms class)

○ Yes, a little

Other (please specify)

[text box]

Please complete the following sentences

2. I come to these classes because

[text box]

3. What I want, hope or intend to learn from these classes is

[text box]

4. What might get in the way of my learning and developing is

[text box]

5. I would describe My relationship with this tutor as

[text box]
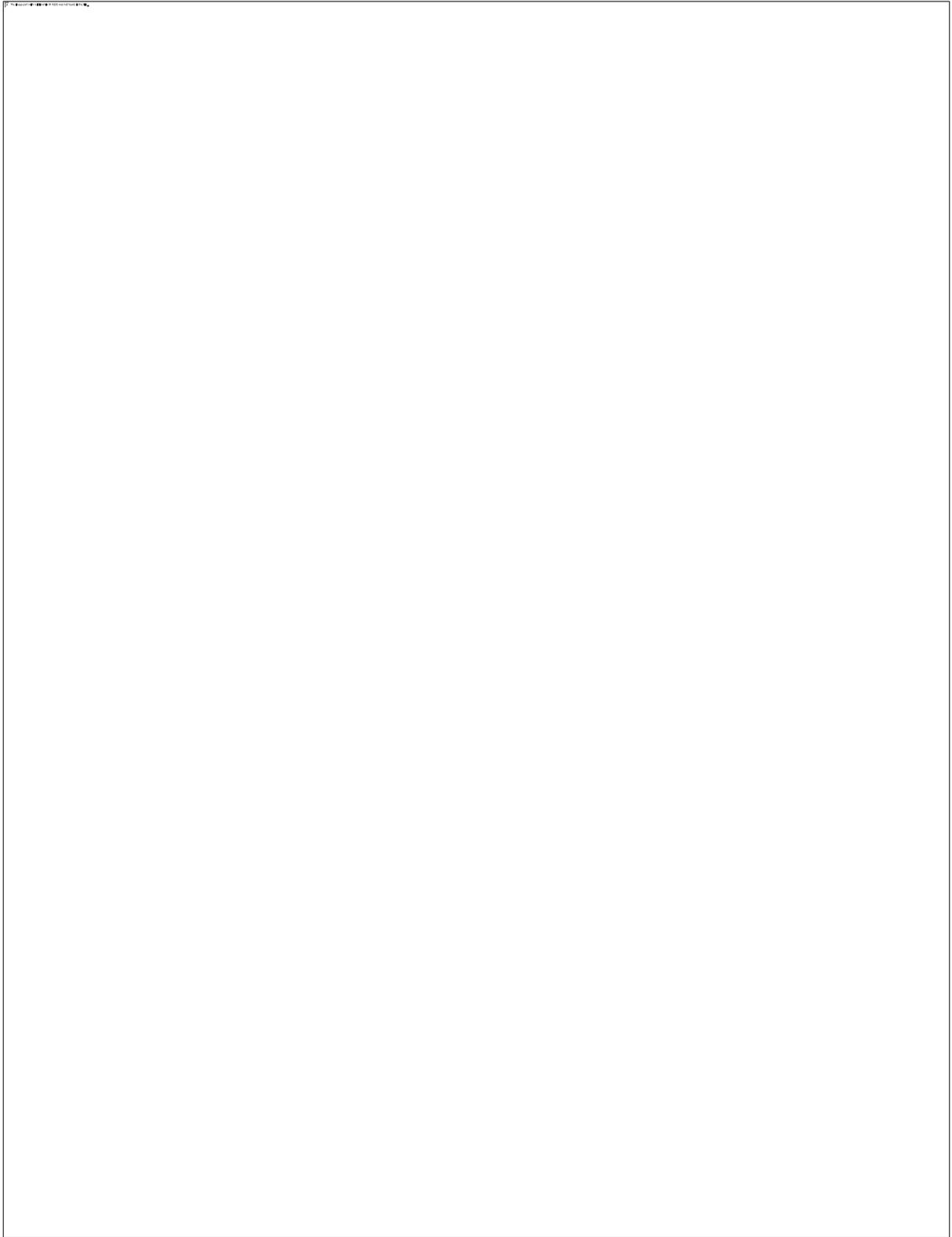
final GP relationships trainees

8. Which qualities should a teacher have in order to help you learn and develop in these sessions.

Please choose only the 10 most important words or phrases

☐ knowledgeable,

☐ respects me

☐ expects me to watch

☐ listens

☐ admits what they do not know

☐ believes in me

☐ recognises my limitations

☐ lets me make criticisms

☐ notices when I am struggling

☐ shows me what to do

☐ corrects me

☐ lets me ask questions

☐ suggests things to do

☐ notices when I am doing well

☐ is kind

☐ criticises me

☐ watches

☐ encourages me

☐ cares about me

☐ is patient

☐ efficient- does their job well

☐ understands me

☐ demonstrates clearly

☐ tells stories

☐ expects me to listen

☐ encourages students to learn from each other.

☐ gives clear instructions

☐ explains clearly

☐ pushes me to do better

☐ confident

☐ asks me questions

☐ praises me

☐ maintains discipline

comments

9. What qualities do you think students should bring to a class (if they are going to learn and develop)

Please choose only the 10 most important

- ☐ show respect for the teacher
- ☐ follow instructions
- ☐ listen to the teacher
- ☐ watch the teacher
- ☐ ask the teacher questions
- ☐ expresses opinions
- ☐ push themselves
- ☐ recognise limitations (what they can't do yet)

- ☐ show respect for other students
- ☐ be willing to try harder
- ☐ have self belief (I can do it attitude)
- ☐ trust the tutor
- ☐ recognise the teacher is the expert
- ☐ use their own experience and knowledge
- ☐ obey teacher instructions
- ☐ admit what they don't know

- ☐ like the teacher
- ☐ care about the teacher
- ☐ learn from other students
- ☐ criticise the teacher
- ☐ criticise other students
- ☐ support other students
- ☐ other

Other (please specify)

[text box]

10. In which ways do you expect to get feedback

(You can tick as many boxes as you wish)

- ☐ Individual verbal feedback from the teacher
- ☐ Verbal feedback to the whole group from the teacher
- ☐ non verbal or indirect feedback from the teacher

- ☐ Written feedback from my teacher
- ☐ Feedback directly from other learners
- ☐ Feedback Indirectly from other learners

- ☐ I give myself feedback
- ☐ No feedback
- ☐ other

Other (please specify)

[text box]

11. Please add any other comments on the structure and content of, and or your experience of completing this questionnaire

[text box]

Dear Monday night dancers, Hello.

I've been dancing the Rhythms for almost a decade, and been dancing with B for many of those years. So you and I may have met and danced together before. In the world outside the dance, I'm an educator extensively involved in Higher and Professional Education, and I'm keen to complete my Doctorate in International Education before I hit 52! I am delighted that B has agreed to allow me to study her facilitation of the ****** group during July.

My interest is in adult learning, especially the relationship between teachers and learners. I'd like to analyse how we learn in the five rhythm context, in order to mix a sprinkling of that special flavour into adult educator practices of the future. The rhythms are one of four case studies the other being, GP training, Undergraduate science, and Shaolin Temple Kung Fu.

During the classes in July you may see me sitting out of the group and adopting the witness position for short periods of 30 – 40 minutes (the rest of the evening I will be a group member participating as usual.) I will be sitting, or making notes of my own responses or ideas. I will be observing B facilitating the group my focus will be on her and the process rather than individuals.

I hope that some of you will **volunteer** to take part in my study. If you choose to volunteer you will be asked to fill in a short questionnaire about your intentions for and experiences of B's **** five rhythms class. The questionnaire will need to be completed before the class starts one evening. Each questionnaire should only take about twenty minutes at most. All questionnaires will be completely confidential, you can choose to remain anonymous and findings will be anonymised.

The questionnaires are available in paper or electronic form.

If you are interested in volunteering, to participate online email me at learn2@lindajones.freeserve.co.uk and ask me to send you the questionnaire or just collect and return a questionnaire at the door when you pay for any class in July.

I am, as ever, looking forward to dancing with you again.

Best wishes

Linda

APPENDIX 4:5 : PROFESSIONAL CONVERSATION / UNSTRUCTURED INTERVIEW WITH P 21/12/07.

These notes were transcribed from detailed written verbatim account of telephone conversation. They have been verified a reasonable and accurate account by AH.

R. I had hoped to record this conversation but alas I cannot get the speakerphone to work. Therefore I will speed write as I listen and I may need to ask you to repeat things.
I will send you the transcript. Could you check it and confirm it as a reasonable account. P.

That's fine.

R. I have few prompts as questions but mainly this is a conversation and I will use them only if we don't cover the ground I need. You are aware of what I am looking at from our initial conversations and having filled in the questionnaire. So I think a good place to start would be how was it for you?

P. Good. This workshop is always a high wire act. I have a specific place I'm trying to get to. And to get there, we need to achieve certain things along the way, so I am less open to things unfolding the way they do than in a five rhythms workshop, I have certain milestones. I'm delighted when we do meet them.

R   How do you know when you reach them?

P. They are external. There is a need to work with small group witnessing, being seen and giving attention so that the work in the whole circle is not totally scary. I'm tracking a quality of "getting-out-of–the-wayness" to create a field of possibility, rich and alive. We have to move at the pace of the slowest member, if one or two are not in it, it is diluted and it's like blowing up a balloon with holes. By Saturday evening I was relaxed because there was a level of focus, ease willingness and "getting-out-of-thewayness" in the room. And felt I could "scoop up" the one or two who hadn't reached that place on Sunday.

R. How do you do that without feedback? (direct verbal feedback to individuals is rare in five rhythms)

P It is fairly new. I now tend to go up to people. Not to say you are not up to scratch but because there seems to be a level of anxiety, resistance to process spoken heard or said. I go up (during break or lunchtime) and say "hello how's your day been?" I cultivate a personal relationship to untangle and develop trust and a sense of relationship.

R.   Can you play out what you mean by "relationship"?

P Levels at which we work can be profound. There's a choice to step into a studentteacher relationship. Not in an evening class sense, but a willingness to be really taught. That requires a very personal opening in the psyche, therefore a strong level of trust in the teacher is needed. It's not personal, but transpersonal – a receptive soul in the "being" which draws teaching through from behind the teacher.

There is a quality of trust, like a level of intimacy with a lover. I've never said this before but it is soul to soul, overwhelming. I'd say it is not teaching skills but a quality of presence. Everything at the technical level is actually about embodied absence - stepping out of the way.

In a way it's unimportant *what* happens. It is more the question of a particular quality of vibration in individuals or the group. Without a degree of trust in the relationship (you could do holy actor without trust but then they just wouldn't get it) it is like the emperor's new clothes. The curriculum is an excuse for teaching.

The more I talk the more I realise the relational level is …. for example when I demonstrate the axis of the work behind me is spirit… spirit to spirit… is beyond the personal. It doesn't matter if the student doesn't like me, but they do need to trust me as the delivery mechanism.

R. As I observed the session I grew increasingly aware of the poetic nature of what you said, very little but rich, precise and inviting imagery. (this had been mentioned over lunch in response to a question from a peer and R apologised to P if it had distracted him)

Brief interruption (3 or 4 minutes) when neighbour arrived for Xmas drink, LJ negotiated alternative time and returned to interview

P.   Yes I have been thinking about it since the workshop.

Poetry is about saying the un-sayable, language as a symbol. The well chosen image has

power, I have known that for a while. I teach a lot using imagery, metaphor and poetry. R.

Do you deliberately choose stories?

P. I trust when something arrives in me worth passing on. Like when your neighbour arrived a minute ago… It is part talking to the group and part listening to where we haven't got to yet. But I (as teacher) have been there before and know it is worth visiting.

There are twelve pairs working all at once. And I'm listening to all that's unfolding, and to a possibility, like a compass-needle. The art of teaching is finding the one thing to say that will open up the biggest possibilities. Say too much and they can't take it, or they'll try too hard. It's a condensed nudge.

If I am critical people close down, too specific people work too hard. I don't address the group too often. I tend to slide under the radar to give the mind something to chew on. Like slipping treats to a guard dog to get access to the king. In under the radar until something else speaks directly to the self.

R.   Whilst I observed I noted you scanning. Was that accurate?

P I don't often take in a whole group in one go, I am sampling fluidly - unless something catches my attention. I am not teaching the individual often. I am teaching the whole, but still they get what they need. Perhaps it is counter-intuitive to give feedback?

R Can we explore "feedback"? This is the usual definition used in academic speak. Quotes Ramaprasad from IFS.

P Yes I understand the "gap". For me there are two types of feedback - one to do with where you have been and one where you might go next.

I only offer *praise* about where they have been for example I might tell them in a lunch break, that was a wonderful scene. But never that it was mediocre. If someone is struggling I might ask "how are you doing?" or initiate a conversation – I want them to tell me. Feedback would be about the next thing you could try. for example "It might be interesting for you to try to pay attention to…."

The product of holy actor, a self-elective study, is not a certificate or qualification, people choose to come for their own reasons. So long as they feel they are getting something. There is no Quality assurance controller. There is only heartbreak and that is not important (said with an ironic smile in the voice).

R   Reads out new definition re formative pedagogy and relationships.

P I am perfectly comfy with your definition. But in a way perhaps the relationship between teacher and student is less important. Gabrielle (Roth) says the rhythms are the real teacher (not the human one). It is an important experience without that 1:1

R Let me challenge and explore that from my own experience. I feel you really care for me. I know I am one of a group but I want to believe you will notice me when necessary. Perhaps the sense of 1:1 relationship is more important for the learner?

P Interesting. Perhaps it is a flow, a river flows downstream towards the student upstream to the collective ground…here is an example. For almost every week for 9 years one woman has attended my open and ongoing groups. I hardly ever give her attention. Every now and then I notice that I am not noticing her. She is loyal and devoted.

I wanted to say at the start of the holy actor weekend the group felt stuck. It was a fragmented circle. I had long established relationships with a half to a third of the individuals but many of the participants knew only a few of the others. It took a long time to develop a unified field of willingness and trust. There was a guarded uncertainty re others. Perhaps to do with London, it took a while for us to soften into us.

R. I am doodling a dot at the centre of the circle with spokes radiating from it; I often use that image to open up discussion about teachers encouraging relationships around the edge of the circle.

P   Yes it takes me back to the quality of presence, required trust in the teacher and trust with the circle.

R   I have become aware that the use of feedback in the academic sense that I am researching is quite distinct from how it is perceived in the questionnaire responses, for example a smile, the intuitive, mostly non-verbal experience of the dance with a partner. Maybe we are discussing what in academic terms might be described as peer support, peer assisted learning or peer feedback?

P. Holy actor is a "Beloved" workshop where we access a state of grace through the 1:1 relationship with another. That is, you cannot do it on your own. It is all feedback. It is not about me, it is not personal. In less spirit language you could say that all learning comes through exchanges with others.

About the form (tutor questionnaire), it didn't speak so clearly to me as this conversation or student questionnaire. I didn't understand the numbers. It was like market research. Perhaps it needed more definitions?

LJ decided to disclose a research question at this point.

R One of my research questions is about the emotional dimensions of learning but I aimed to keep the words "emotions", "feel" or "feelings" out of the questionnaire and explore where they emerged in the responses. This would probably be even more important in some of the other case studies that are less explicitly emotional or don't have a personal growth orientation.

P. Ah, mm. You see, I think ideally the *whole* person is involved in learning – emotions yes, and also mind body and soul.

R.   So for you in your use of the term relationships would emotions be present?

P   "Emotion is the currency of relationships"

If I think about the really good relationships I had with teachers at school there was trust, loyalty, devotion and emotion. The best teachers who inspired me. The root to learning would be inspiration and spirit.

R There is a similarity to what is emerging from the early conversations with a Shaolin master.

P Yes, what we come for is not always what we go away with. The ego pays for the workshop the soul takes it. for example At school we study to get a job, but in the right hands the subject opens up wonder, feeds us.

R   And that resonates with ideas of lifelong learning

R I am aware of the time and we need to bring this interview to an end. I just want to thank you and then ask you about your experience of the research process. This has a slightly different aim as it validates, for my assessors, that I have conducted this research in a professional and accountable manner.

P I want to congratulate you on your getting-out-of-the-wayness. I think we negotiated the process well and I was very happy with the advance arrangements and what happened in practice. Your timing around when to be in or out of the group was always half a step ahead. You quickly became an invisible witness.

Would you like me to write to the 5 rhythms teacher you want to observe in New Zealand to reassure her about the research process?

R   Yes please. Thank you again. Is there anything else before we stop?

P   Yes I would like to read the final paper.

R   I'll make sure you get a copy, probably about this time next year. But I can send you the "considerations for practice" an appendix to the last paper which underpins this research.

P   Yes please.

Typed up December 28th 2007. Linda Jones.

APPENDIX 4:6 POST OBSERVATION INTERVIEW WITH M UNDERGRADUATE RESPIRATORY MODULE.

M Have you analysed the student survey yet?.

R No I'll do that when I've got all the data. I am happy to send you the findings.

M Nothing back from **** yet

R Let me show you this minute paper I thought you might like to read what I wrote, (see)

M laughs

R I was very impressed, I'm an ok teacher but not a very good lecturer and I was impressed.

What I want to do is to make sure that I have some research questions – especially the nature of the relationship between educators and learners so that's what I'm wanting to look at but I'm not wanting to drive this interview but to explore your responses to the questionnaire as a kind of guide so that we both drive it.

M mmm

At the end I will try to sweep up any specific questionnaires.

M OK

R So This was your questionnaire

Just to get it going can you talk to me a bit about tell me about the sessions that I came along to

M Well the "respiratory control of breathing" lecture is one I give every year and it is really the subject of my research interest as well, so I don't find its an area I find it difficult to be enthusiastic and hopefully that helps the students to feel more enthusiastic about it. Um, One of the reasons I was brought in they wanted more physiology and link to human physiology, stuff students really find interesting but don't have much time for. My lecture contributes to that for example breathlessness when I show that video of the patient who is extremely breathless I think that is an eye opener for the students. Cos they usually have to wait until they are in their clinical year before they get the shock of seeing a patient who is desperate for air. If you give it to them in the first year they get a better perspective what they are letting themselves in for, they know from the outset this will lead to them seeing patient who is really quite desperate. It has a sort of sobering impact on them

Every year I notice they are all chatting, once they have the video they suddenly pay much more attention to the lecture, That is why it is placed half way through the session when their attention may be sliding well they may be getting a little bit bored and this brings them back again. **

R: So you deliberately place it in the middle of the lecture?

Someone suggested I place it at the beginning but \I found the music video to start with… the music video that resonates with the students a lot more …. They can relate to it, is tapping into their natural tendency. It is not irrelevant it is very much related to the subject matter of the lecture that makes them feel that physiology is in everything around them and hopefully …even when listening to music they will be thinking of and being reminded they are constantly thinking about   constantly think about breathing of breathing. That will help them I believe when they come to revise

R yes yes, some of these questions were about the words you used about relationship were encouragement …… and the word enjoy came up… what for you is significant about enjoyment?

M On personal point of view, if I am not enjoying it I get very little out of it and it becomes much harder and very difficult… so if you are listening to a lecture it need to be enjoyable seems obvious to me that you have to make lecture enjoyable to grab their attention if nothing else . Enjoyable lectures they will remember it more. So they will retain information

R. So it is for retention and recall what about if we look at the relationship you have with this very large group of people…..

Disappointing only 192 as there should be 290…. not bad but disappointing. These are first years, still coming to terms with the speed they are learning… many of them are strategic learner. I thought they would be more likely to come for a quiz, it consolidates suggests what might come up in the examination and can flag up confusion.

This is why I am disappointed. Give them questions to think about what might come up. Can feel despondent

Is that (quiz) part of (*)?

First of all a great way of consolidating what you have taught them and another thing is it shows the students the stuff they are learning might be examined. There are plenty of specialists and experts in respiration and cardio vascular and so there are different teachers. We all have to teach but some focus on research, if you like teaching it doesn't impact on the job. Some lectures mean brownie points. I like it, keeps me healthy to keep improving and polishing it. I use clickers and blackboards, e- mail directly then I can upload the questions anon. I want to use other experts and fine tune it (series of lectures/ quiz) and use feedback. It's popular but not a big deal.

Some students hate it. They enjoy it, say it "helps me" want to do more as they get instant feedback. Group is too big to mark 300 scripts. We can't use this for summative yet. Some students are reluctant to use blackboard – got 40 postings but now it is a revision source when details are clarified they can get over the hurdle. Students are getting better at IT though there are good and bad.

They think "you can ask us anything" when they see a question on the topic they are reassured.

L What else do you think you are teaching them like they are getting good at presentations.?

Students know a good lecture. Good lectures have structure and are well signposted. The students learn to make presentations through role modelling. I see this in PBL in later years, role modelling helps them structure and signposting helps them and helps the audience.

Unfortunately we also need to grapple with discipline. Lectures are not compulsory but if they attend they should be considerate. Many course leaders complain. In the first lecture of this series there was lots of chattering. I had a patient there and the students were able to ask questions. But still lots were chattering. I couldn't interrupt because of the outsider but really if they want to chat they should go somewhere else to do it The problem is that the culprits often are the ones who stay away. The college is dealing with it by introducing a student charter which taps into GMC guidelines. The lack of discipline can be a shame because the majority find the lectures useful and the serious ones get upset. I think they prefer the lecture to be abandoned than for the lecturer to tolerate all the chattering.

There is an art to lecturing. They learn from them whether good or bad.

R Can I challenge that there has been a history of didactic lecturers that has been hard to shift in medical education, do medical students really differentiate between good and bad in that way?

M Based on their comments during later PBL sessions they say they forget bad pointless lectures and take transferable skills from skilful presentations and discussions. With good lectures they remember, they are enjoyable they mimic the presenter they learn what to avoid, like when they fall asleep in didactic lectures. There is a grey area we (R: medical science teachers?) all come from that tradition we learned it can't all be bad.

R So tell me about relationships in that tradition? What is important to the students

M. Knowledgeable. If teacher is knowledgeable it reassures the student. But it is important not to know everything, we don't know everything and shouldn't pretend to, or the students switch off. How you deal with that is important I say. I can't answer that but I will find out or I can point you, I might send an e-mail. There is no need to know all but it is the way you deal with the questions. How you present is also important. If you are not animated it doesn't go down well. They sometimes laugh and make fun of the way you animate but they do appreciate it.

R how did you learn to be an effective teacher?

M I did C**** (Post Grad medical education programme) but I have learned from doing it for a few years. For example I think you can be too interactive. I used to start the lecture by asking them questions but I didn't know they had seen the answers and so it wasn't working.

R It sounds like it is about training and experience and finding the balance?

M Yes you have to play it by ear, let the students initiate , make them feel comfortable, able to ask questions. You need to be on their wavelength and respond to their puzzled looks. Being intone and responsiveness is important. Staying student centred even when half of them are asleep.

R How do you manage to stay motivated, manage your own emotions when students are asleep or disruptive?

M It is easier in a small class you can do something to help snap them out of it. In bigger classes too you need to engage their interest. Is there something I am not doing right? – it's a form of feedback to me.

R I noticed in your questionnaire you cited respect to and from students and teachers, can you tell me more?

M There used to be an emeritus professor here – he was old school he commanded respect. The students were petrified. He walked up and down the aisle, would point to student and say, you just because you are sitting at the back doesn't mean you will escape questions. Don't think you are safe? The students would all pay attention. It takes a certain kind of person to pull that off. It's not my style.

I try to get respect by showing them I am there to help them. This is very very important.

R tell me more?

M An example I didn't get respect from a group of Doctors recently, I'm a scientist and there is an old struggle between scientists and physicians. Sometimes doctors think you can't teach us anything we know it all. That doesn't happen so much with students. It can be easy lose students respect though for example through mumbling, talking to

oneself. Don't lose respect it is crucial. There are always some who don't respect you but you have to be firm or lose the respect of the others. It is all delicate. Mm this is reflective practice for me, I am supposed to reflect and I don't often get the time.

R I notice you use quite a lot of metaphors and anecdotes can you tell me more about that?

M Some concepts are really difficult you have to find other ways for the students to understand. In the session you didn't attend I used peanuts, the students took peanuts on a tray (the supplier) then others transported them on a spoon, someone might eat a peanut. This comes from a paper published by someone here at **. It fell a bit flat in such a large group. I think I will need to direct them where to look. I think it can work and needs to be done better, we didn't have enough preparation this time. There is some research that students given this kind of visualisation retain the information and perform better in the exam. It is worth this being an ongoing idea we will try it again next year. It is important to be specific and get into a metaphor quickly or you lose attention.

Another important point is to manage time constraints and if possible finish a few minutes early

R Tell me why that is?

M Students hate it when you run over. They switch off. They are packing their bags. I try to avoid that situation. They don't take it in It is better to summarise and consolidate rather than introduce new ideas late. It is important not to cram too much in. Less is more, less is more. This is hard to learn When we are keen to show all we know. A few key slides are better than 60 slides (as a colleague used a few weeks ago). Avoid cramming too much in.

It has been rewarding doing PBL with post graduate entrants. One student came with a whole lecture. I let her go on we can work as a team. Purpose? The team comes up with knowledge. Students said it had great impact.

R: Please say more about the impact of the emotions for example Video of breathless patient was a shock.

M. I have a specific point to get across. I want them to recognise how bad breathlessness is. Their experiences of breathlessness probably pleasant e.g exercise. Don't encounter it until the clinical years but this consolidates their other learning that it is a problem. They don't have a patient to experience but the video shows the relinquishing of control the video bring up ethics etc. It brings things home. A problem for med students who have only begin by taking medical histories, they need to know why they ask certain questions. The experience of shock is subjective slight for some people higher for others. This shock treatment is to get them to take their profession more seriously to prepare for better history taking.

R Time's run out> How has the process of being involved in the questionnaire, interview and observation been?

M Time to reflect whilst ticking the boxes. The nodding etc resonated and suggested i was on the right track and also this highlighted some areas for more attention.

Agreed to e-mail the transcript. Transcribed by L Jones

APPENDIX 4:7 ITERATIVE METHODOLOGY AND EXTRACT FROM DATA SECONDARY ANALYSIS

For multiple choice questions each item was doubly coded with colours and letters using the following framework which emerged from early analysis of the data. Colour broadly denotes category. Sometimes statements fitted two or more categories. Letters denote direction of the item for example care for learner vs. learner care for pedagogue.

TABLE SUMMARISING CHOICE QUALITIES PEDAGOGUES SHOULD BRING BY TYPE (QUESTION 8)

	Respondent / Coding type	GP tutor	GP trainees	Shifu	Kungfu student	5R tutor	5R dancer	Respiration lecturer	Medical student
a	From tutor (green)	2		3	4	1		1	3
	From tutor (red)	4	2	4	1	3	2	3	2
	From tutor (blue)		2	2	1	3	2	2	3
b	Toward tutor (green)		1				1	2	1
	Toward tutor (red)								
	Toward tutor (blue)		1	1	1				
c	Others (green)		1		1	1	1		
	Others (red)								
	Others (blue)								
d	Self (green)								
	Self (red)								
	Self (blue)	3	3		2	3	4	2	1

TABLE SUMMARISING CHOICE QUALITIES LEARNERS SHOULD BRING BY TYPE (QUESTION 9)

	Respondent / Coding type	GP tutor	GP trainees	Shifu	Kung Fu student	5R tutor	5R dancer	comments 5R dancer	Respiration lecturer	Medical student
a	From tutor (green)									
	From tutor (red)									
	From tutor (blue)				1					1
	Toward tutor	1	2	4	4	1	2		4	3

b	Toward tutor	2	2	2	2	2	2		2	2
	Toward tutor									
c	Others	1	1	1		1	1	2		1
	Others	1	1	1		1	1	1	1	1
	Others	1	1			1	1			
d	Self	1	1	1		1		4	1	2
	Self	2		1	2				1	2
	Self	1	3			3	2			

1. Green behavioural

    a. From tutor

    b. To tutor

    c. To each other

    d. Self

2. Red Affective

    a. From tutor

    b. To tutor

    c. To each other

    d. Self

3. Blue expression of judgement

    a. From tutor

    b. To tutor

    c. To each other

d.   Self

*Denotes statement fits more than one colour code

The table below is organised to identify items in their broadest category and the most obvious direction in order to highlight similarities and differences between the groups and suggest descriptors for each case study and for the four case studies as a whole.

TABLE ANALYSING PATTERNS ACROSS CASE STUDIES BY MEAN RATINGS												
QUESTIONNAIRE ITEM TYPE	BEHAVIOURAL	AFFECTIVE	EXPRESSION/ JUDGEMENT	GP		SHAOLIN		5RHYTHMS		RESPIRATION	
6 Confidence in tutor Difference Between scores	Improve practice	Motivation Enjoyment	Achievable goals Meet learner aims	Tutor 3.33 -0.58	Group 2.75	Tutor 1 +0.45	Group 1.45	Tutor 3.5 -0.12	Group 3.38	Tutor 3.5 +1.34	Group 4.84

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7 Relationship	Notice learners*	a Care about learners Notice learners* Trust individuals Care about learners as group b Individuals will care about me Individuals will trust me Individuals will respect me	d Quality of rel with individuals will effect learning Qual of rel with group effect learning								
Average scores											
Difference between scores				2.42	2.38	1.57	1.87	1.71		3.14	
				-0.04		+0.30		+0.14		+1.16	4.30

B Expects learner to listen and watch Expects learner to listen			1		0			0		0
C Encourage peer learning			1	1	0	1	1	1	0	0
D Admit what don't know*	d Confidence*. Admit what don't know*	d Admit what don't know*		1	0		1	1	0	0

APPENDIX 5:1 OBSERVED KUNGFU SESSIONS

This is the first session I observed of Kung fu. When I arrived Shifu explained that there would be fewer people because it is August. Probably only 12 -15 instead of 20 – 30 people in the class. I asked how this might make a difference and he said more time for individual students. In the class there was Chinese music playing… I observed from a bench sitting next to several parents of the younger children

There were only 4 adults in this class. At one point Shifu joined in and shouted faster. He clapped his hands started running as a warm up and Shifu was shouting common.. the music was turned up and he shouted faster…He called out a Chinese word (yi) and stretched his arm at which point all the students lined up and watched him. He called out "ok relax, relax" and then started to move his neck. They all copied his movements. Relax he called as he walked around changing the direction of the head movements. They copied. I noticed sometimes he counted upwards one two three sometimes backwards ten nine. Come on stretch the body.

Ok jumping relax, come on stretch the body. Ok twenty push-ups fast. His tone as intense and sounded rather aggressive to my Western ear. He called squat counting one to ten then

ten to one two adults joined the class late. He called faster the drumming was now louder he called faster, faster. Notice his voice and the music create a soundscape for the activity. Faster faster come on. Head to toe common counting common concentrate head to toe. I notice one of the experienced adult (H) is helping a very small child gently moving his foot (it seems to me to aid balance)

Shifu shouts change and then ok stop ok walking knees, twist. Shifu notices one young girl and corrects her position over three strides without speaking to her. Don't give away power twist walking relax ok, ok just relax and twist.

Go concentrate … Shifu picks up his Shaolin pole and points walking backwards as if to draw the child towards him. Come on faster faster.. he touches a student gently with the stick, come on faster, faster one ah to, one ah two. I notice the soundscape. Students follow the stick in Shifu's hands I note that all students seems relaxed and their ability to kick (the height and whether they connect with their hand or twist across their body varies significantly)

Shifu stands at the edge and focuses on each individual as they pass before him offering one or two words of feedback usually higher or faster "must be faster" "run fast or lose power."
As one new child (X) joins the class late he takes a turn and does the jump.. Shifu praises "good boy", it seems to me that he has decided to praise this child.

For about twenty minutes he focuses on the different students in their turn. Sometimes he doesn't even seem to nod others he twists and turns and demonstrates. He gives some specific feedback Shifu is now standing he calls "body straight", "feet together" as they each attempt specific jumps or cartwheels. He sometimes demonstrates body twists or merely calls faster. The youngest child (aged 4.5) returns briefly to his parents and they wipe his nose and kiss him. He rushes back eager not to miss his turn. He father remarks "*my son*" very proud

An older student attempt a jump and misses he smiles and tries again. Shifu takes the tiny child and pulls his arms into a position providing a sensory form of feedback. The child does not seem to mind being pulled firmly and his parents beam proudly. He tries the cartwheel jump again. Shifu, H and the paerents all laugh as H comment yeah he got it and smiles broadly. The little boy just continues to concentrate and take his place again in the group to await his next turn.

The students now do cartwheels more particular feedback for each student, legs straight, the tiny child returns for water to his dad who kisses him. They do low spins, X the late arrival again receives positive feedback, good. One of the young men asks a question " how do you know when you finish the spin? He does it and Shifu gives the young man a small nod, as observer it seems Shifu has non verbally shown the young man knows the answer to his own question.

Top next time next time stretches. The music goes off Shifu calls ok in a line.

He calls out a word (name of a position) and everyone moves to the floor balancing on two arms and one leg the other leg out-stretched. He goes to child X and lifts him by the hair, stretching his foot, holding the wobbling child in place. Attempting to let go but returning to support his hair an foot. The little boy grimaces but remains determined at last able to hold the balance. As an observer I am surprised by how this child is being pushed, but the child does not seem to mind, as if it is what he expects.

He turns his attention to the whole class "Use power concentrate" common

Kick harder The students are in a row balancing there is gentle music now… let eyes be sleepy "Ok? to each small child"? I record there is gentle alignment with each person.

Shifu asks the tiny balancing child "are you relaxed, do you remember" the little boy says "I remember" he checks with the late arrival boy "are you relaxed." I note there have been few questions from the class until now. He speaks to the whole group. Shifu uses the pole to demonstrate.

Now the students are in a line. They breathe together raising their arms standing on tip toes then dropping their feet to the ground. Hey end with their palms together. Teacher and students bow to each other and clap.

Second observation Session 2

I notice the parent of the late child talking animatedly in Chinese with Shifu, I imagine that the parent is very keen for the child to learn. The little boy is resting alone. The parents of the tiny boy (Eastern European?) leave cuddling their little boy. Several students engage Shifu in a conversation.

Ten minutes later a new class starts and several new students arrive. It seems they are more experienced. He start running around the space, then he calls running backwards, they all turn and instantly obey. He asks one student "are you very sad?" H fell and the

group laughed. Shifu then instructed the group to go and stretch at the windows. Each student placed a leg on the window sill and bent head towards knee. He gently touched the late child and Shifu walked around smiling. Still smiling he says use your head to touch your toes. Shifu gives feedback to one boy "no" and then very gently helps the child push head down further to increase the stretch until he is satisfied and says "yes". I notice the little boy continues at full stretch even after the teacher has removed the pressure.

Shifu uses the pole to straighten another child's leg. Smiling as the child wobbles he says "balance, balance". The children are still talking with the adults and H is encouraging a young Asian boy. Shifu calls "ok bring it up and change legs." Stand on one leg, stand straight barking "don't move". One little boy is told forcefully don't move, but the master's body language seems very gentle. I wonder if it is different teaching children and adults. He speaks to the whole group. They move to one end and then take turns in lines kicking as they travel. Shifu shouts " Fast" "competition" To one young man he says "excellent" then a harsh demanding common to the whole group.

In this class each student took a turn to step out and perform specific movements for Shifu, I notice that each student's Kata(?) a part of martial arts sequence that they are currently practicing. Some are far more complex than others. The students observe each other and Shifu watches each in turn. Two young adults who had been changing from the first class leave the hall and wave a cheery greeting to Shifu.

The older adults stand together occasionally making a comment to each other I can't hear but imagine it is about their performances.

Shifu is sitting and observing but saying very little only occasionally giving feedback to individuals usually, "higher, faster" etc. "Next one "The children begin to chatter and Shifu tells them firmly to watch "give full attention". They stop talking. He gives full attention to each person offering a soundscape of noises, "ah, pah yah" to support their performance.

It takes my attention. H says to one young girl (I had been introduced to her as a winner of many prizes) are you tired? This phrase seems to have currency in the group. I think it conveys care, noticing and also an encouragement to put more effort into the class. The young girl makes an obvious mistake and she, her classmates and Shifu all laugh then she does it again.

Then Shifu gets the class in a line and addresses them ok, jumping, relax…Shifu is showing. Watch keep body and legs straight, head straight, straight he says moving a

young man's head before massaging his shoulders. Ok concentrate, body straight, he offers another demo, They copy "ok quickly one two three"! Concentrate. Shifu shows "how not to do it", he shows the movement with floppy arms. "Balance your body, don't be lazy, common. He gently pushes a child's shoulder then massages him to relax. He rearranges the child, common too slow common one two three. Very fast, he continues in this vein. I notice the different energy in this class. With this more experienced group it seems there is a different energy , stronger relationships?

Shifu demo's a more complex spinning jump move and I notice that H has moved out of the group to practice this alone. Faster, faster, very good is aimed at one particular student. A child is pulled up gently by his hair. He offers an experienced of balance then says close your legs spin faster, ok now rest.

They perform their ritual, teacher and class bow to each other and clap.

Following this class I have a conversation with Shifu which is recorded with the interview.

Informal interview / conversation with Shifu.

Between my second and third observed session Shifu joins me and asks how my works is going "Is ok?" He begins to explain some things to me and I confirm I would like to write what he is saying. He apologises for his English.

What follows is an account based on my notes of this conversation.

I ask him about when he helped the child to balance, pointing to the spot. He replied by commenting that he must not always push children, in the UK it is very different. The parent are very different. In China, Gong fu is taken very seriously and the teacher would push more. Must push. But here it is up to the parents. He acknowledged the children are not always happy but he wishes to train the heart, here it is different. To become professional (as might be the motivation in China) they must be serious. Some gong fu schools just play but if they are serious you use all of you. He must respond to parent and encourage child more than one month and stop. He introduces new movements to get children to think differently, the same movement but different, it must change at the right point. After three years they say I am good now and want to stop. Shifu must introduce newer movements again, new parts of competition he says not everyone is the same. I check my understanding with him that he seems to say as

teacher he must judge when to encourage repetition and ensure success and when to push and add more complexity and motivate development. He nods. I explain how we call this concept scaffolding, mimicking scaffolding and mentioning bamboo is used in China. He seemed to like this concept and agree that he scaffolds learning designed for each individual and their level of development and personality.

He talks of devotion to the master and his expectation that the whole class must follow. He has an expectation that the students "relax" from the beginning. They may be tired but they must relax or they will be "tired". He tells me he responds to each student.. tells them he is training their heart… not just for kungfu but to help them study and do their jobs. For Shifu the learning from Kungfu to their world outside.

In China a lot of people do kungfu not just punch and kick, once someone is good at Kungfu they don't need to fight…. In China the importance of Kungfu for health is significant. The master is more important than the parents. There must be respect for the teacher. Kungfu is taken very seriously adults are different yes.

I was confused by the next set of comments but then realised that the significance of Kungfu when people have a job is to "keep the body working good". How in China, Kungfu is a high stakes activity as without health there is no possibility of employment, no means of making a living. Therefore training the body to be well, saves money and offers a route to and remaining in employment. A family can loose all their savings because medicine is very expensive.

There are different motivations where healthcare is not free. In China people look after their body. In Britain people don't look after their body in the same way. Children like the competition in China and they know it is easier to get a job in China if you have Kungfu. You are more confident. If you succeed in Kungfu employers will recognise that you are worth employing, (have self discipline and self esteem). Many people who study kungfu get jobs as security guards, they act as role models and they make money from film stunts.

I asked Shifu if the relationship is important and he says students and friends are the same they behave as if they trust you.

In Britain lots of young people waste their time they don't want to read books and waste their time. They come to do kungfu to become big and strong for fighting. Students can get a big head. They don't study and they smoke, they think they are good. There is a need to link to the cultural expectations of Kungfu…. as master he is big and strong, not

just a big head… he still studies (I think this means practices). If you train for kungfu smoking is no good for the body. At the YMCA everyone smokes and wastes their time.

Shifu says that insight is very beautiful, students make one step, two steps and enjoy it. There is a feeling of nothing, it is not too slow. Following more clarification I realise that he seems to be describing flow theory, the beauty and pleasure of learning and development. If you are lazy everything is difficult. Some people come tired and very lazy, everything is hard work. It is "mouth to mouth feeding". They train hard and feel good they get a sense of well being and use their time. Some people are more difficult, they need more help and then he must show more examples.

He spoke of training hard and his own motivation is to get more students and open a second school. He is very ambitious. "very hard work with the gym but good comes from hard work". Some teachers are not, in Shifu's opinion professional. Although it is easier to teach children sometimes the master has to prove he can jump very high As a master he has to work hard, the children must watch. The master must be a role model and "not have a big belly and just talk He must show". No beliefs just listen not talk just listen they must believe and trust in martial arts.

In the West kungfu and life are very separate. When the master jumps high he lets the student jump easy and then hard, again we discuss scaffolding and how we use this idea. He explains if you do good when easy you get confident, then difficult and then confident and then fail. He also explains how kungfu is not always angry some times it is important to relax. I think he is talking about flow theory, Sometimes the student must concentrate hard then relax for a while.

In college students must show respect even if they are not good. Still learn.

I ask about the how people from different cultures and body shape are managed in the class he speaks of them being very different. He comments that many black women are very tired, some students are very relaxed, shy or happy. Some students are very fast or their bodies jump well but slowly, slowly change can be made. Not every day the same… add a hand movement do a cart wheel with two hands, on hand no hands. People are flexible. People are like a car he tells me old cars drive good but not so fast.

Final observed session

This is the third class - for experienced students of martial arts.

There are six students all male and they are already running as H had offered to get them started whilst Shifu is talking to me. He begins to run side ways and the others follow.. Shifu joins them for this warm up activity and begins to call out faster, legs up lift your feet. He claps to keep time. As an observer I become aware of how much more serious and exciting this class feels.Now they are jumping as they run. At one point in their circuit shifu holds out his pole and tells

them jump over. I notice the pole is quite high as H approaches but is lowered as others jump. As the student takes off the end of the pole is dipped, it seems, to ensure that all students succeed.

Ok 2 minutes hand stands… Shifu notices one student struggling and walks towards him telling him go up slowly. Common, handstand "because why" (following our conversation I recognise how he uses this rhetorical device to signal an explanation) "make arms strong". Shifu does a handstand with the students and then he calls ok all come and stretch. The men are very hot and sweating, taking a drink as they position themselves at the windows and bend their heads towards their knees.

**

Shifu calls more instructions.. balance on one hand he shouts as he attends to the landing mats. He then calls them into a line up and gives an instruction begin boxing foot work and all the students begin to shift their weight from side to side and move their feet. He demonstrates and explains… not step too big or small difficult to balance… he illustrates what he means. No power. Heels up because why…. Too tense too slow step be very quick watch and he demonstrates the precise footwork explaining how and why he then invites H to come and demonstrate with him, spinning and kicking, incorporating the detailed footwork into the kickboxing moves.

The students are standing in line practicing these kicks. Even to my novice observer eye I can see their different styles and skill levels. Some kick out but don't look backwards as instructed. When they are not sure Shifu moves amongst them

offering them an alternative and making them laugh by saying the spinning kick is not like a carousel.

Ok punching and Shifu produces a whip which he uses very effectively as a prop for explaining how a relaxed arm can produce a whipcrack. This rips through the air. A tense arm fails to produce the speed and noise. The Shaolin pole is also used to show how rigidity would slow a kick down before another whipcrack reinforces the need for a relaxed body. This is noted as an example of using theory, another is his explanation and demonstration of why people must be in control of their feet

in order to move back and make the connection with the punch… too close loses power too far doesn't connect.

I notice the music is now loud and insistent as they begin to punch Shifu is calling out pah pah pahpahpah! The students do the same as they practice. Shifu is shouting faster and higher. He shows the students a whip lash turn and it is so fast the students look amazed. He shows how if you do it too fast you will lose balance and can't repeat. I notice he is now showing what to do and what not to do more and more demonstrating the movements right and wrong… (perhaps allowing the students to develop sustainable self assessment and self correction). Now they are kicking, body and legs together. He gives a very clear demo of the power of the kick when using leg or whole body. He kicks at one of the heavy hanging bag and it swings. Having stilled the movement he kicks again, with "whole body power" pah the bag powers through the air, swinging very much higher.

The soundscape is aligned with the movements. He demonstrates with the experience student H. H collects the punching guards and hands them out. The students move into pairs taking it in turn to be the kicker and the target (using the protective hand held guard. Both H and Shifu give guidance on safe holding. There is some humorous comment and everyone laughs. Each pair moves down the room and Shifu offers feedback. H is now teaching as well, good don't move yet. The students are breathless they are giving each other lots of vocal encouragement now. Yeah man, yeah yeah! They are giving each other feedback.

The students remain in their pairs and kick to the rhythm of 1 , 2 1, 2 as each partner takes a turn to kick the bag. Shifu counts ten kicks each adding faster harder.. the pairs fall down exhausted as their turn ends. H is also shouting keep going. When the newest member of the group is kicking and showing signs of fatigue everyone is adding vocal

encouragement, yeah common… it is a real high adrenalin noisy soundscape composed by the whole group.

Then Shifu has them doing press-ups .. do it one more, one more now relax. Now , squats fast but then he calls a pace change… slow then he speeds up sits ups both slow and fast. Shifu demonstrates sit ups and leg lifts. Shifu calls splits, he demonstrates. The differences between the students ability is obvious even to my untrained eye. At the end Shifu calls them into a line and they follow the ending ritual.

What has been really noticeable about this has been the soundscape – so much noise, calling, pah's and ooufs. Common. It had such a different quality here especially Shifu's use of because why as a rhetorical advice for explanations usually in relation to power.

Such explations were rarely used in the other sessions.

Linda Sept 1 2009

Coding of affective dimensions of learning identified from combination of Plutchik, list of emotions and shades of emotions / emergent affective dimensions of learning.

Where first tutor score combines numbers of coding in tutor open comments and observation score 2 coding from professional conversation.

Affective dimensions of learning	GP		Shaolin academy Kung Fu		5 Rhythms		Undergraduate medicine respiration	
	Tutor	student	tutor	tutor	student	student	tutor	student
Trust Admiration trust acceptance	6 + 4	6("good")	6+10	1+4	4 (in profession)	6	3+ 4	5
Fear Terror fear apprehension	8+2	1	2+3	5+2	1	1		6
Surprise Amazement surprise distraction	5+2		3+3	5+2	3		3+1	5
Disgust Loathing disgust boredom	+3		+1	2+5			+1	1

Sadness Grief sadness pensiveness	+2	1	1+6 Pensieveness	3+11			2	
Anger Rage anger annoyance	3+9 mainly annoyance	2	3+7	1+6		1	+1	
Anticipation Vigilance anticipation interest	11+3	2	5+2	4+6			4+2	3
Joy Ecstasy joy serenity	18	1	6+4	3+2		4	8+1	4
Love Like love adore	+1	4 (friendly)	3+9	+1 Appreciate "it"	1 friendly	2	3+ 4	11
Care Empathy care concern	15+6	1	12+7 NB Does not include respect	5+11 Respect earned or "standard"	2	6	11+9	3
Positive intension Hopefulness positive	9+8	1 See	8+7 Includes respect	7+6	6 Performance	8	4+4	1

surrender		usefulness	as surrender		orientation			
Confidence Anxiety confidence self esteem	5+2	2	9+6	1+5		4	3+3	5
Clarity Confusion clarity guidance	12+5	1	9+4	4+5		1	3+3	1
Comfort Discomfort comfort relaxed	9+5	1	8+2 Tolerate discomfort	1			3+4	2
Openness Tiredness openness readiness	7+6		5+3	2+4		3 (tired) Under-coded as general eagerness	3+3	6
Belonging Individual belonging community	6+5	3	4+1	1+1 Individual or prof			4+2	2

Usefulness Relevant Useful	3+3	5	3+3	1+4		2	2	3
Dispositional								
Comments	Reflect (O+Cl) Challenge Presence ?							

Analysis of narrative data.

Each set of narrative data consists of responses to open ended questionnaire items for both students and tutors, then to records of observations and interviews for tutor. The manual coding was conducted using multiple iterative readings, though different lenses which lead to the overview recorded above and the analysis shown below. The aim of coding was to identify themes rather than for comparison either between learner student or between case studies although differences in the patterns identified are valued within the discussion that follows.

GP Notes.

The use of a personal sense of comfortableness emerged as a clinical skill and a professional tool for the educator. Also comfort re room and eating

Humorous use of pressure is on for competition cf with Kungfu, fear represents positive anticipation and excitement. Keeping order usually done by reminding of ground rules.

Tutor challenging and taking risks for example early use of games to build group and visit to homeopathic hospital.

Respiration notes.

Trust seems to be mainly in the system for example GMC professionalism standards rarely in the individual lecturer.

Most of the "care" codings are in relation to respect. Here respect seems to be specifically related to usefulness to the performance orientation. For example good lecturer helps pass exams, presents clearly for recall. As observer felt learners sometimes disrespectful.

The only coding for love is one mention of appreciating "it".

The numbers of codings in the professional conversation suggests a great deal of the tutors work and approach is implicit, not recognisable by observation. The is a high level of sadness disappointment, shame, unfortunately   The tutor seems disempowered.

Does "getting out of the wayness" mean disappearing, little evidence of explicit understanding of emotional labour or of care and respect from learners.

Shaolin notes

Much of the trust is in the order of admiration for shifu, trust physical bodily engagement. Trust enough to tolerate discomfort. Expectation learner trusts the tradition. There is an implicit clarity, orders are simple and clear and obeyed. Much of the care is in the alignment between shifu and the level and perceived need of each individual learner. Evidence of love of all orders "from heart" cheery wave.

Respect is not perceived of as a form of care but as almost a right. Respect seems to flow towards the Shifu (father figure) and love from him. Here respect was coded P of the order of surrender and high trust.

The Shifu external respect and trust of others (non learners depends on demonstration of skills). I didn't know how to code the soundscape - very important.

Link to western theories sometimes easy. ZPD & Flow Cultural differences show in high sadness and annoyance. Didn't code serenity but most of time learners really focussed and in flow – a calmness. Didn't code problem re unfamiliarity with Washu culture **5Rhythms**

notes

The students and the tutors in this case study demonstrated a willingness to contest language and ideas. The students made more comments than those in any other case study which seemed to suggest a level of self confidence and the availability of a wide vocabulary for describing emotional landscapes and experiences.

The observation highlighted the use of positive feedback to the group in the form of "good", yes or beautiful. These terms were often coded as caring.

The students and the tutor (and the researcher) use specific terms the meaning of which were difficult to code within the framework- for example being present, being authentic and holding the space. Other terms difficult to code were courage and fairness (these also emerged in the Shaolin case study.)

Respect was shown in a different way where the teacher is clear that she cannot care about everyone but can offer the practice as a place for them to deal with what are, after all their emotions.

Coding of love and caring was high in this case study with some emphasis on creating a safe and comfortable environment within which discomfort and sadness could be tolerated and worked through. Boredom – "the mundane" was not perceived as a negative but as a reality, a shadow from which excitement or interest might emerge.

The concept of trust here was often referring to the concept of self trust of acceptance and openness to authenticity. The sound-scape is highly significant in this case study as music is actively chosen by the teacher to shape and hold the experience of the class. Overall points discussion conclusions.

Often dilemmas of coding could only be resolved by situating the item within the context of the learning and by triangulating the results to elicit meanings. Most often coding dilemmas were resolved by allocating multiple categories for example Providing instructions was mostly coded as clarity + positive intention or fear plus care.

Challenging might be coded as fear or surprise plus positive intension or care depending upon the context within which it was expressed. Similarly the capacity of learners to contest a point or question the tutor might reflect disgust or trust, openness to learning or self esteem. Trust might be in the system (professional development) the individual or the group. Silence often seems to demonstrate attention and caring but at times it illustrates engagement or possibly serenity. Terms such as friendly are coded as like on the Love scale. Care was deemed to include concepts such as respect, appreciation (applause).

No distinctions were made in the coding between expressions of trust in the system, the tutor or learner or oneself not whether usefulness is for surface or deep learning however this is considered in the analysis and discussion.

THE SUPERVISOR AS COACH: EFFECTIVE QUESTIONING: THE "G R O W" MODEL

The effective coach usually prefers to use ***questioning*** rather than telling in order to:

- raise the learner's awareness of their developmental needs
- create enthusiasm in the learner to be coached
- help the learner to take ownership of their own learning
- help the learner to set their own goals
- help the learner to make realistic action plans
- help the learner to find solutions and answers for themselves
- build the learner's commitment to implement their plans and reach their goals ▪ support the learner in applying and in refining further what they have learnt.

The "GROW" model described here is a framework and checklist of the sort of questions a coach can ask the learner for these purposes.

When using these questions, use whatever words fit your natural style and language: there is no need to repeat the exact wording in the checklists!

GROW is a useful acronym for remembering the four key areas where questions will be helpful. But you do not need to follow the sequence of letters G-R-O-W: you can jump in and out of the questions according to the needs of the situation. The questions can be used both when coaching individuals and when coaching a team. They can be used at the start of a coaching session, to set goals and clarify expectations; during the session itself to draw out the learning; or after a session to summarise and consolidate the learning.

You do not need to use every one of these questions in every coaching session; indeed, you may on some occasions not use any questions at all! Whilst a questioning approach is usually the most effective, there will be times when the learner wants clear direction, information or feedback from you, in which case excessive questioning may simply irritate or frustrate them.

(Adapted by Stefan Cantori, from: John Whitmore (1992) *Coaching for Performance. A Practical Guide to Growing Your Own Skills,* Nicholas Brealey Publishing)

GROW: Goal, Reality, Options, Will

GOAL: SETTING GOALS FOR THE LEARNING PROJECT IN GENERAL, OR FOR THIS PARTICULAR COACHING SESSION

- What exactly do you want to achieve (short/long term)?
- By when do you want to achieve it?
- If your goal is long-term, can you set yourself some sub-goals along the way?
- How much of this is within your own control?
- How will you measure it in quantitative terms?
- How well are you doing now, on a scale of 1-10?

REALITY: CHECKING AND RAISING AWARENESS OF THE SITUATION RIGHT NOW

- WHY HAVEN'T YOU REACHED THIS GOAL ALREADY?
- What have you done so far to move towards this goal?
- What have you already learned from that?
- What are the reasons for the score you gave yourself (above)?
- Are there particular situations that affect that score (positively or negatively)?
- Are there particular people who affect that score?
- Are there any constraints outside yourself that stop you moving towards this goal?

- How might you overcome them?
- What's *really* stopping you?

OPTIONS: FINDING ALTERNATIVE STRATEGIES, SOLUTIONS, ANSWERS

- What **could** you do to move towards this goal?
- What **else** could you do? And what else? (keep repeating this!) ▪ If *time* was not a factor – what could you do?
- If *resources* were not a factor – what could you do?
- What would happen if you did nothing?
- Is there anybody whom you admire or respect who does this really well? What do they do which you could try?

WILL (AND WHAT, WHEN, BY WHOM): TESTING YOUR COMMITMENT TO YOUR GOAL, MAKING CONCRETE, REALISTIC PLANS TO REACH IT

- Which of all the options will you choose? (Maybe several) ▪ How does this help you to achieve your goal?
- How will you know when you have reached your goal?
- Who else needs to know about your plan? How will you inform them?
- Who else needs to help and support you in your plan? How will you get that support?
- What obstacles do you expect to meet? How will you overcome them?
- When specifically (day, time) will you take the first step in your plan?

COMMITMENT CHECK

What is your personal commitment to achieving this goal, on a scale of 1–10? If it is less than 8, can you break it down into smaller

steps, or revisit your reality/options?

APPENDIX 10.2 Flip chart of plenary following emotional labour session.