

The BRIDGE[®] Model

The Case for Integrating Phenomenological Documentation

And Participatory Action Research through Collaborative Inquiry:

Transformational Learning in Transforming High Aspirations into Human Agency

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Abstract

The purpose of this paper is to describe the methodological construct of the BRIDGE[®] Model implemented in the Ecuadorian Amazon rain forest that facilitated social justice. In 2009, the model was implemented with the Kichwa indigenous community of Rio Blanco. As a result, by 2010 this community was able to build a road to connect their community with the world and to get rid of four mining companies from its territories without violence.

This model of intervention is strengthening democracy while stimulating economic development with human dignity in this Indigenous community, and promoting social justice.

This paper describes how the BRIDGE[®] Model is an example of a system thinking approach. System thinking has two components: system thinking and systemic thinking. System thinking is objective (tangible). This objective data is measured by quantitative and qualitative research methods approaches. On the other hand, systemic thinking is subjective (intangible) as in the case with our taken-for-granted assumptions, or our mental models. This subjective data is addressed by transformational and organizational learning techniques. Systemic thinking is a mode of thinking that keeps people in touch with the wholeness of our existence; that human thought is not capable of knowing the whole (Flood, 2006).

This paper is structured as follows: (1) Background Information; (2) Transformational Learning versus Transactional Learning; (3) The BRIDGE[®] Model as a new paradigm, (4) The BRIDGE[®] Model methodological construct; (5) Description of the intervention, and (4) Conclusion.

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Transformational Learning in Transforming High Aspirations into Human Agency

(1) Background Information

Since XVI century there were people living in the Amazon rain forest. Our targeted population lives in the Ecuadorian Amazon rainforest, they are the Family Grefa and the Kichwa community of Rio Blanco (46 families). Their origins are found in the indigenous Tupy and Huaorani who emigrated from the west from Brazil (Manaos) in their way to the Ecuadorian Andes, creating the tribes of Oas, Omaguas y Yameos. The members of the family Grefa are Kichwa-Omagua. The main activities of the Kichwa community are fishing and tourism.

The targeted population lives in their own environment and culture in the Amazon rain forest, but they are challenged by globalization and therefore they entered in “a state of disjuncture” as Jarvis calls it (Jarvis, 2008). This is the case of indigenous communities in the Amazon rain forest where oil, logging or/and mining companies have brought significant social changes, disease, growing poverty, and violent conflicts to those communities. Not surprisingly, this intrusion of globalization in their lives became the “disorienting dilemma” (Mezirow, 2000) that precipitated the process of transformational learning. Transformational learning theory as presented by Mezirow (2000), is about making sense of our experiences; it is a meaning-making activity. Meaning making related to everyday learning can be distinguished from meaning making in transformative learning as follows: “Normally, when we learn something, we attribute an old meaning to a new experience.... In transformative learning, however, we interpret an old experience (or a new one) from a new set of expectations” (Mezirow, 1991, p. 11). This “new set of expectations” or meaning perspective is arrived at through critically reflecting on the

assumptions, biases, beliefs, and other things that structure the old perspective or frame of reference. Mezirow (2000) defines a frame of reference as “the structure of assumptions and expectations through which we filter sense impressions.... It provides the context for making meaning” (p.16). Mezirow recognizes that “frames of reference often represent cultural paradigms (collectively held frames of reference)—learning that is unintentionally assimilated from the culture” (Mezirow, 2000, p. 16). It is in these frames of reference that we undergo transformation as we critically reflect on our underlying assumptions and “taken-for-granted beliefs” (Mezirow, 2000, p. 19). These assumptions may be psychological, sociolinguistic, moral-ethical, epistemic, aesthetic, or philosophical in nature.

Mezirow (2000) has laid out 10-step process of transformative learning beginning with a disorienting dilemma that sets in motion a self-examination of one’s underlying assumptions, followed by sharing these thoughts with others, which leads to exploring new roles, relationships and actions, a trying on of new roles, and finally “a reintegration into one’s life on the basis of conditions dictated by one’s new perspective” (Mezirow, 2000, p. 22).

(2) Transformational Learning versus Transactional Learning

Freire’s theory pedagogy of the oppressed (1970) speaks about banking. Banking is the way of teaching as a lecture; this is when the professor is in front of the classroom doing Transactional Learning. It is a transaction of information. Currently, in schools, colleges and most professional development trainings, transactional learning is used. On the other hand, transformational learning is when through Collaborative Inquiry (CI) we are capable to “see” our behavior. When we are capable to observe our own behavior and act accordingly with conscientization (awareness), it is the first step to transformational learning.

This concept of conscientization, which is at the heart of Paulo Freire's theory pedagogy of liberation (Freire, 1970) connotes both consciousness and conscience and thus captures the cognitive and normative processes that constitute this form of reflective knowledge. In our interactions, during the BRIDGE[®] implementation, we emphasized the learning process, such as single-loop learning, double-loop learning (Argyris and Schon, 1996) and the triple-loop learning (Torbert, 1991, 2001, 2004) with different focus on behavioral and cognitive change. Through our reflections we moved from the single-loop learning, to the double-loop and triple-loop learning of where we were addressing why and how to change our taken-for-granted assumptions in order to be effective in our learning. At the individual level, interpretation of the environment leads to the revision of individual knowledge structures (Walsh, 1995).

As we reflect, we better understand perceived changes in “agentic” behavior that happened with the BRIDGE[®] Model implementation. Bandura (1986) describes “agentic” behavior in his social cognition theory perspective that views people as self-organizing, proactive, self-reflecting and self-regulating, not just as reactive organisms shaped by environmental forces or driven by inner impulses, which is in opposition to the conception of humans as governed by external forces.

(3) The BRIDGE[®] intervention as a new paradigm

The BRIDGE[®] Model intervention is a different paradigm research because involves research *with* the community participants, not “on” or “about” them. This form of inquiry is often summarily described as doing research *with* people, rather than *on* them (Heron 1996; Heron & Reason 1997; Reason 1996, 1988, Reason & Bradbury, 2010). Such posture requires acknowledgement that academic researchers are not outside the system, but rather are an elemental part of the composition of the system involved in the study (Stacey et al. 2000).

A dominant research paradigm is based in studies *on* the targeted populations. To change this paradigm, Argyris and Schon (1996) call us to recognize practitioners as inquirers and encourage the collaboration of researchers and practitioners. It is interesting how they point out that a researcher takes a position of a distance, as an impersonal agent. A researcher is a “spectator-manipulator”. On the other hand, a practitioner is an “agent-experient” because practitioners are within the problematic situation as concerned actors. The scholar who designed the BRIDGE[®] model is a practitioner that became a researcher and through collaborative action inquiry she was able to merge both the researcher and the practitioner.

(4) The BRIDGE[®] Model methodological constructs with a system thinking approach

The BRIDGE[®] Model, as a program of investigation, is conducted using a mixed-method approach involving both quantitative and qualitative components. In order to address system thinking, the BRIDGE[®] Model incorporates two methodological approaches with the intention of producing a set propositions regarding the introduction of collaborative action inquiry methods into an ongoing conversation about this action learning intervention while monitoring the outcomes.

Taking into account the collectivistic cultural values of the targeted community, the BRIDGE[®] Model is “engaged research” looking at the process through which community participants construct and take the initial steps toward an actionable and empowering strategy for protecting their culture, their way of life and their land.

System Thinking

System thinking is objective (tangible). This objective data is measured by quantitative and qualitative research methods approaches.

Qualitative Methods

Accordingly, the BRIDGE[®] Model incorporates these two methodological approaches with the intention of producing a set propositions regarding the introduction of collaborative action inquiry (CI) methods into an ongoing conversation about this strategy. In qualitative inquiry, phenomenological documentation and PAR are different approaches. However, in spite of their differences, these two approaches can be integrated to empower disenfranchised people. By combining these two approaches, due to their differences they complement each other and can become an effective tool to facilitate the ‘voice’ of people who otherwise would be silent; silent because of the language barrier, lack of knowledge of the system or/and afraid of their current social power structure. It is important for an oppressed group, which may be part of a culture of silence based on centuries of oppression, to find ways to tell and thus reclaim their own story (Salazar, 1991). In the case of the Indigenous Kichwa community, this community has experienced over 500 years of oppression from colonization.

The integration of both approaches, starting with a phenomenological approach, which led into PAR through CI, was guided by (a) the need to produce knowledge that is relevant to and acceptable by the professional community and (b) a consideration of the power differentials between this Indigenous community and a mining company. Indeed, if qualitative research is about the generation of communicative process, and its aim is the establishment of productive forms of relationships (Gergen & Gergen, 2000), we cannot ignore the power differentials between the participant groups engaged in our studies.

A) Phenomenological documentation

Kasl and Yorks (2010) state that the epistemic participatory principle posits that meaningful knowledge generation can grow only from the knowledge-maker’s personal

experience; this principle derives from the phenomenological assertion that one can best understand human experience by being inside that experience. Phenomenology has the primary objective as the directed investigation and description of phenomena as consciously experienced, without theories about their causal explanation and as a free as possible from unexamined preconceptions and presuppositions. Edmund Husserl is the founder of Phenomenology, a method for the description and analysis of consciousness. This method reflects an effort to resolve the opposition between Empirism, which stresses observation, and Rationalism, which stresses reason and theory. Phenomenological documentation is a type of research highly emergent. Heron and Reason (1997, 2008) describe how an extended epistemology transforms felt experience into practical new knowledge that grounds action.

B) Participatory Action Research (PAR) through Collaborative Inquiry (CI)

Bray, Lee, Smith & Yorks (2000) define CI as a process consisting of repeated episodes of reflection and action through which a group of peers arrives to answer a question of importance to them. PAR is a form of inquiry that is often summarily described as doing research *with* people, rather than *on* them (Heron 1996; Heron & Reason 1997; Reason 1996, Reason & Bradbury, 2010). Such posture requires acknowledgement that academic researchers are not outside the system, but rather are an elemental part of the composition of the system involved in the study (Stacey et al. 2000). Therefore, their intentions, decisions, contributions to conversations, and actions are among the many factors influencing the outcomes that emerge from the activities and interventions in the study. Action researchers typically pursue problems that are more complex than those of conventional social science (Greenwood & Levin, 1998). The co-creation of an inquiry process for addressing these problems is an additional component

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in the system, adding to its diversity with the researchers learning along with others from working with the system, not working on it.

Quantitative component

Through the intervention, the Kichwa community was able build a road for access to their community and got rid of four illegal mining companies without violence. The description of how they achieve these goals are in *Phase Two: Action steps undertaken after the community meetings*

Systemic Thinking

On the other hand, systemic thinking is subjective (intangible) as in the case with our taken-for-granted assumptions, or our mental models. This subjective data is addressed by transformational and organizational learning techniques.

The program facilitates achievement of their goals by addressing “habitus”. BRIDGE[®]’s unique approach includes the addressing of “habitus” as part of its delivery model for transformational learning. According to Bourdieu (1977), “habitus” is a system of internal models- habits of the mind, habitual ways of thinking. Habitus is developed in people everywhere as a function of the ways of which they live their lives and their status in society. For ethnic minorities, disadvantaged immigrant populations and low-income families, the “habitus” they develop naturally has limited utility as they function in the cultures that have gained hegemony. BRIDGE[®] seeks deliberately to broaden “habitus” of the populations that are targeted by providing acculturation experiences, educational services, and the cultivation of agency to compensate for the social isolation that has contributed to their “habitus.”

When working with families, the BRIDGE[®] model talks about how to facilitate them to develop a more "empowering view of their current reality". By this we meant to help them to

seeing current reality that reinforced rather than undermined their sense of confidence in shaping the future. "This reality" is perceived by most people like the pressures they live by day after day, crises that must be reacted to, and limitations that must be accepted. Due to such ways of defining "reality", their dreams (visions) are like illusions or must better say delusions, which are not an achievable end. How then can we create an intervention that could help people see reality as a medium for creating their visions rather than a source of limitation? The BRIDGE[®] Model intervention is addressing this issue by helping people to see their problems in terms of underlying systemic structures and mental models rather than just short-term events. Peter Senge (1990) questions if we are prisoners of the system or prisoners of our own thinking. This information can help in appreciating the forces shaping reality, and how we are part of those forces and can affect them. And the BRIDGE[®] Model intervention facilitates participants to make that connection in order to change their paradigm through transformational and organizational learning techniques.

(5) Description of the intervention

Phase One: A community meeting in the rainforest

The data from the community meetings of the first phase were sufficiently rich to permit the drawing of their own conclusions for the development of the eco-tourism initiative which is sensitive to the needs of this Indigenous community. However, to be relevant, these ideas had to be derived through "dialoguing with a polyphony of voices" (Flyvbjerg, 2001, p. 139). In this process, the researchers do not claim final authority but, instead, develop knowledge through input to the ongoing dialogue and praxis.

The first phase began at a community meeting (with 46 families) on July 2009 with a kind of co-inquiry that requires academics to take the lead in fostering both what has been called

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abstract knowledge involving *'know-what'* and *'why' knowledge* and knowing in practice, involving *know how* and *care why* (Fox, 1997; Quinn, 1992; Vaill, 1996). All parties involved in such co-inquiry need to be reflexive and testing of (a) content (what is perceived, thought, and felt in terms of both formal knowledge and their personal stories); (b) process (how this content is being experienced and processed); and (c) the taken for granted premises and suppositions revealed by this reflexive process. Engaging in this level of reflexivity requires both the intention and skill for what Torbert (1991, 2001, 2004) has identified as first, second and third person action inquiry. When participants in an action research project engage in co-inquiry, they all need to inquire into the nature of their perspective practices regardless of whether these practices involve their work as academic researchers or in various practitioner functions in the organization (Yorks, 2005). In that sense co-inquiry is *educative* for all the inquirers, as academics, practitioners, and participants develop new perspectives of their respective worlds.

Reflections on Phase One

At the community meeting, the discussion began with their concerns regarding the presence of a mining company in their area. During the meeting, everybody was feeling powerless in front of this situation and they felt the “object” of these external circumstances regarding the mining company. There was the need for them to move *from object to subject position*. Macedo and Bartolomé stated in 1999 that they were convinced that providing pedagogical spaces enable people to move “*from object to subject position*” produces more far-reaching, positive effects than the implementation of a particular teaching methodology. Addressing “*from object to subject position*” is a very effective way to face perceptions in order to empower people. People have the tendency to blame and complain. Here the Indigenous people were complaining and blaming the mining company for their problems. They blamed and

complained that their current circumstances are happening because of something from outside-of-them (external).

In this case, they thought that they were the “object” of something outside of themselves that it was out of their control. Therefore, they “own” their current circumstances and do nothing about it. To go to the subject position is to give up all the excuses and take the position that whatever the person is experiencing is the results of how the person is responding to the events rather than the events themselves. What most people do when they do not get the outcome they want, they blame the event. When they blame the event for not having what they want, it puts all the power outside of them. There is nothing you can do about external events. What is just is. The basic principle of going “*from object to subject position*” is getting yourself out of blaming and complaining and into taking responsibility of how you react to the event.

The inquiry began by asking them how they felt about the rain forest being destroyed by these companies. They talked about their frustration and about how many times they saw it happening before in different places in the Amazon rain forest. Then, the inquiry continued by asking them to whom belongs the properties where these companies were intruding. They stated that the land belonged to them. Then, the inquiry was: If it is your land, then do you have the right to ask who these companies are, and if they have authorization to do this type of work in your property or not? Many times government authorizes this type of mining (through bribing a governmental agent). But, at that moment, the indigenous people were in shock (their paradigm shifted). After a pause, they began to talk among themselves regarding how to get that information. They assigned who was the committee that was going to talk to the mining company. Then the inquiry was about, what would be the work they would like to do? They stated that they wanted to develop an ecotourism initiative in their community. They talked

about the community tourism they do with Agustin Grefa. Agustin has tourists coming to his family lodge Ruku Kausay and the community is who provides fruits, chickens and other foods. Then, the inquiry was about how to bring more tourists to Rio Blanco? They stated: we need to build a road. The next inquiry was: how we can create access? They stated that they could talk to the authorities and ask for machinery to build a road for vehicles to have access to Rio Blanco.

At certain point, we spoke about their plan to confront the mining company. They were going to confront those companies at a personal level; they were just going to put themselves in front of those huge machineries with a machete in their hands. However, after the inquiry process they decided to become a legal entity. As a community they could form a non-profit entity that will talk to the government and ask the government to help them to protect the jungle.

All the time, as they were bringing their concerns, they also brought their own solutions to the discussion. Through the inquiry process, it was very important that they felt that these solutions were their own solutions. If they own the process, then they will follow through with their plans. This is the ecological approach that emphasizes adapting the research enterprise to the culture and the context of the participants. These ecological ideas generate a participative, collaborative and contextual emphasis. These ecological ideas are particularly salient for action research because the action *and* the research are embedded within the culture of the participants (Kelly, 1966, 1968, 1971, 1979; Kingry-Wetegaard and Kelly, 1990; Trickett, Kelly and Vincent, 1985).

Phase Two: Action steps undertaken after the community meetings

The second phase entailed participatory action research (PAR) through Collaborative Inquiry (CI) as a way of learning how to explain their particular world by working with the

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people who live in it to construct, test, and improve theories about it so they can better control it.

At the end of the July 2009 meeting, the goals and next step were as follows:

- 1) First goal: to protect the rainforest; next steps:
 - (a) Find out if they are a non-profit entity. If they are not, then create one.
 - (b) Find out information about the mining company
 - (c) Create a system to inform about situations where companies are destroying the rainforest.
 - (d) Create a procedure to make the complaints to the government regarding these companies.
- 2) Second goal: to create job opportunities through eco-tourism initiative; next steps:
 - (e) Ask governmental officials to provide machinery to build the road for access.
- 3) Third goal: develop a proposal in order to look for funds; next step:
 - (f) The researcher to write the proposal in English

Reflections on Phase Two

It was during this meeting that the design was evolving as the first reflexive experience spontaneously took place. This realization led to the adoption of a participatory action research (PAR) model through Collaborative Inquiry (CI) in order to obtain deeper participation in developing recommendations for local action. Steps were taken to assign people to different tasks. Below is a description of some of the products that have emanated from this research endeavor.

Activities and processes facilitating data utilization

- 1) First goal: to protect the rainforest
 - (a) Find out if they are a non-profit entity. If they are not, then create one.

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To date, they are a non-profit entity and they called for a General Assembly and restructured their leadership electing a new president, vice-president, treasure and secretary.

(b) Find out information about the mining company

The new leadership began to ask questions about the mining company to discover that its operations were illegal because they did not have permission to extract gold. The new leadership wrote letters to their elected official, visited and requested them to make the mining company to stop its operations. The mining company began to use its lawyers to earn time, but the new leadership with the support of the local government was successful expulsing the mining company from the rain forest.

(c) Create a system to inform about situations where companies are destroying the rain forest.

Currently, the community assigned a person to begin the process when anybody finds out that a mining company is trying to get in the rain forest.

(d) Create a procedure to make the complaints to the government regarding these companies.

By 2010, they created the procedure and they were able to get rid of four mining companies without violence.

2) Second goal: to create job opportunities through an eco-tourism initiative

(e) The Indigenous community decided to build a road to their village,

The new leadership wrote letters to the elected officials requesting machinery to build a road for access to the community of Rio Blanco. By the end of 2010, the road was completed and they are ready to receive the students.

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3) Third goal: develop a proposal in order to bring college students to Rio Blanco.

(f) The researcher to write the proposal in English and bring college students.

In December 2010, the researcher met with Evelin Lindner, president of the World Dignity University (WDU). Currently, WDU is supporting this project. The WDU generates interdisciplinary research and circulates information aiming to enhance awareness of human dignity to promote social justice. The initiative of this project aims to build upon and strengthen the members of the Kichwa community and to spread their knowledge to others. This initiative was designed in four stages: 1) Connect with higher education institutions to bring scholars and students to develop specific Participatory Action Research studies. 2) Survey of the land, giving the Kichwa community the legal rights to own their lands; 3) Eco-tourism and Natural Medicine initiative; giving the Kichwa community a livelihood; and 4) establishing a pilot at the Kichwa community of Rio Blanco to be replicated in other indigenous communities in the area.

1) Connect with higher education institutions to bring scholars and students to develop specific Participatory Action Research studies. A presentation regarding this project was done at Washington & Jefferson College in October 2011. As a result, students from environmental studies wrote grant proposals to find funding for their research while doing Action Inquiry. In June 2012, students from Washington & Jefferson College went to Rio Blanco to do PAR for a month. 2) Survey of the land, giving the Kichwa community the legal rights to own their lands: By March 2011, all 45 families from Rio Blanco had their titles, giving them legal rights to their lands; 3) Eco-tourism and Natural Medicine initiative; giving the Kichwa community a livelihood: The research done in June 2012 was the creation of an inventory of what Rio Blanco has within its own ecosystem. They completed their research through zoning; the zones were set up like a map, where there is a description of every medicinal tree and plant in each path (each

path has over 50 medicinal trees and plants). There are three paths: a) To the “Cave of the Anaconda”, b) To the tree “Samay Yura”, and c) To the “Rio Sulfuroso”. This information was cataloged in a document that will become a part of a textbook for teaching natural medicine. The Kichwa community of Rio Blanco wants to teach natural medicine to other indigenous people in the Amazon; and 4) establishing a pilot at the Kichwa community of Rio Blanco to be replicated in other indigenous communities in the area: In July 2012, Dr. Evelin Lindner visited this pilot at Ruku Kausay in the Ecuadorian Amazon and after meeting Agustin Grefa and his family, and interacting with the students, this pilot became a branch of the World Dignity University (WDU).

The methodological construct of this research was PAR through CI, which produced an epistemological shift in students. When students arrived to the Amazon, they research paradigm was doing research *on* people. The systemic reflection process facilitated in students a shift in their paradigm. By the time the students left the Amazon, they learned about doing research *with* people. This form of inquiry is often summarily described as doing research *with* people, rather than *on* them (Heron 1996; Heron & Reason 1997; Reason 1996, 1988, Reason & Bradbury, 2010). Such posture requires acknowledgement that academic researchers are not outside the system, but rather are an elemental part of the composition of the system involved in the study (Stacey et al. 2000). This ecological approach emphasizes adapting the research enterprise to the culture and the context of the participants. These ecological ideas generate a participative, collaborative and contextual emphasis. These ecological ideas are particularly salient for action research because the action *and* the research are embedded within the culture of the participants (Kelly, 1966, 1968, 1971, 1979; Kingry-Wetergaard and Kelly, 1990; Trickett, Kelly and Vincent, 1985). Thus, participants go through an epistemological shift when they are capable to “see” their taken-for-granted assumptions from their own culture.

In October 2012, there will be a presentation about this project at Teachers College, Columbia University, New York. In November 2012, a presentation of this project will be done at the 14th Conference of Social and Community Psychology at the Norwegian University of Science & Technology in Trondheim, Norway. In December 2012 there will a discussion at a Round Table at the Workshop on Transforming Humiliation and Violent Conflict, at Teachers College. The purpose of these presentations is to bring students and scholars to support us in this effort facilitating economic development with human dignity, strengthening democracy and promoting social justice.

(6) Conclusion

Knowledge provides power, when the “colonized” person realizes about the “mental models” that guide his/her behavior, this person can find his/her own power within and exercise an agentic behavior. The problem is when the person is so comfortable that he/she is not willing to see his/her mental models. As, Gaventa and Cornwall (2006) state, we need to understand both the ‘pedagogy of the oppressed’ (Freire, 1970) and the ‘pedagogy of the oppressor’ and the relation between both (p.77).

In order to deal with the mental demands of modern life, adult thinking needs to continue to evolve through higher level of consciousness. Orlando Fals Borda (2006) describes the painful duty as researchers to decolonize ourselves, to discover the reactionary traits and ideas implanted in our minds and behaviors mostly by the learning process.

The BRIDGE[®] model with a system thinking approach is addressing objective data through quantitative and qualitative research methods. And with a systemic thinking approach, which is subjective data, BRIDGE[®] is addressing a paradigm shift in our taken-for-granted assumptions through transformational and organizational learning techniques. The BRIDGE[®]

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model is a sustainable and accountable intervention that facilitates people to see their problems in terms of underlying systemic structures and mental models rather than just short-term events.

This WDU branch in the Amazon facilitates Indigenous participants with their families, college students and professors working together as equals identifying the best way to move this project forward while promoting social justice, stimulating economic development with human dignity and strengthening democracy.

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