Integrating Research with Conference Learning: 10 Years of Q Methodology Studies Exploring Experiential Learning in the Tavistock Tradition

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Abstract: Empirical assessment and self-study procedures were implemented during a series of nonresidential weekend group relations conferences in the Tavistock tradition and were used to augment conference learning for staff and members. These studies were organized and conducted so that focus on the conference's primary task was maintained. Findings of several studies of leadership, learning styles, and the role of the consultant are discussed. Administrative and methodological problems encountered in integrating research with conference learning are also reviewed. Because of the Tavistock model's distinctive emphasis on subjectivity and on learning through direct experience of covert and often primitive processes, a research methodology compatible with experiential learning was sought. Q methodology made it possible to obtain quantifiable, objective, in-depth information about values, attitudes, and dispositions characteristic of individuals and of individuals and groups in interrelationship. The Q studies were carried out over a 10-year period as an integral part of conference work. Learning based on firsthand observations and experience was combined with feedback based on systematic empirical research. The staff reviewed research findings in post-conference sessions to promote their development and competency. Conducting research in the context of group relations conferences provides experience in dealing with conflicting attitudes toward relying on knowledge based on personal experience, empirical data, or theory for decision-making. The results of this study have implications for conducting self-study and assessment outcome evaluations in other institutions and organizational settings.

The Educational Goals of A.K. Rice/Tavistock *Working Conferences*

In the mid 1950's, A. K. Rice and his colleagues at the Tavistock Institute for Human Relations conceived what we have come to know in the United States as *group relations conferences. Working conferences* in the Tavistock tradition are conducted now throughout the world. They were designed originally to supplement didactic training for executives and managers by providing special opportunities for experiential learning about authority and leadership.

In describing the distinctive task of these working conferences, A. K. Rice stresses that they are to provide opportunities to gain *knowledge-of-acquaintance* through experiential learning that is distinctively different from *knowledge about* (Rice 1965, p. 24). Conferences in the Tavistock tradition are exercises in gaining the kind of knowledge relevant to a person's capacity to *be* — the kind of knowledge that enhances the capacity to act in particularly relevant, effective, and sophisticated ways. The distinction between experiential and abstract or theoretical learning is basic to understanding the characteristic objectives and methods of the Tavistock model. Thus, Bion's psychoanalytic understanding of the difference between *knowing about* and *being* (1962, 1965), is critical to understanding group relations conferences in the Tavistock tradition and to understanding their far-reaching impact over many years in many different settings. Although the early development of this work at the Tavistock Institute for Human Relations was influenced by Kurt Lewin's work in the United States, the influence of Wilfred Bion and other psychoanalysts was powerful in giving the Tavistock model its distinctive emphasis on studying covert and regressive processes in group and organizational dynamics.

One can hear echoes of Kurt Lewin's work with groups emphasizing communication and feedback, but the greater influence of psychoanalysis that stresses interpretation and attribution of meaning is clear. With regard to the functioning of the staff in their roles as conductors of these conferences, Rice notes:

> [He/she] cannot observe with a detached objectivity that relieves him of the responsibility of taking account of what he is feeling himself. If he finds himself becoming embarrassed, anxious, angry, hurt, or pleased, he can ask himself why he is feeling what he is feeling, and can attempt to sort out what comes from within himself and what is being projected onto him by conference members. ... [He] can use himself as a measuring instrument — however, rough and ready — to give him information about the meaning of behavior, both consciously and unconsciously motivated. If he can then find an explanation of the projection in terms of the specific task set for that event, he can make an 'interpretation' about the behavior of those present, including himself. ... So far as he is able, the consultant [staff member working in that

role] is concerned only with what is happening 'here and now'. ... The skill of the consultant lies in his capacity to analyze — on a barely conscious intellectual framework — his feelings, and to express them in ways that will help the members of the group to understand their own feelings as they are experiencing them. (Op. cit. 26-7)

Group relations conferences in the Tavistock tradition reflect Bion's resolute determination to advance the human capacity to seek and discover knowledge. For Bion, being alive and relating in a social context are vital to both learning and being. Group relations conferences are in the psychoanalytic tradition. They are temporary educational institutions to provide opportunities for learning in the "here and now." In its objectives, design, and methods, the Tavistock model for studying groups and organizations parallels Bion's vision and work as a psychoanalyst.

The Challenge of Doing Research in the Context of the Tavistock Tradition

True to this tradition, we in the Chicago region sought to add a kind of research activity to the program of conference events and activities that would be compatible with the basic intentions of the Tavistock model and would add to the opportunities for the participants to learn. We wanted the research also to be relevant to the broader interests of academic and clinical group psychologists. Such research and teaching objectives are often thought to be incompatible. To accomplish both, the researchers and their methods had to be authorized and made intimate parts of the conference, open for self-study like all other aspects of staff and member behavior. The research methods had to combine advantages of projective techniques in psychology with the ease of administration characteristic of commonly used objective assessment techniques. Despite modern developments in the use of the Rorschach (Exner 1978; Lipgar 1992a), for instance, in the field of personality assessment, adaptation of such procedures for group administration did not seem appropriate.

A.K. Rice resisted doing research on these conferences on a number of grounds, because he did not want to focus on details without understanding the institution of the conference as a whole. Integrating research activities into the conference work requires clarity and commitment to the primary task of the conference, which is to provide learning opportunities for the registered members. To do this, we had to articulate our motives for collecting data as clearly and simply as possible.

Findings not only had to be accessible, but also had to be made a part of the experiential work to the extent possible. The research had to be open for discussion and study, including the interpersonal and systems impact of the research team, its role and performance, as well perceptions and fantasies of staff and participant-members about the researchers, their methods, and their

data. Fears and fantasies, hopes and myths about the power of researchers, their instruments, or the truth of the research findings have to be considered as part of the *life of the group*. These attitudes and questions were made part of the conference experience and studied as such during the conference so that more *learning by acquaintance* could be achieved.

To do research in such a context, the director of the conference selected leaders for the research team who were fully experienced and qualified both as study group consultants and as researchers in other settings. The conference director discussed the research goals and methods in detail with the individual selected to head the research team, who then accepted the role of assistant director for research. Together the director and the assistant director for research selected 2-3 additional members for the research team. Each of these individuals was experienced as a member in several conferences and had additional qualifications as a researcher, analyst, or staff member in other conferences. Prior to the conference, the research team met regularly to prepare the research instruments, plan the work in detail, and build team cohesion.

Steps in a Program of Conference Research Studies

Q Studies of the Small Group Consultant's Role
The role of the small study group consultant carries much of what is distinctive in the tradition. The research focused on that role, because the small study group experience is particularly critical to member participation and learning from the work of the conference. Conference participant responses on evaluation questionnaires have subsequently provided support for this decision by consistently rating the small study group experience as the one in which they were most emotionally involved and from which they learned the most.

Mindful of Rice's caution not to lose the whole in the study of details, we decided first to study staff orientation to the role of the small group consultant. We began by interviewing a number of people who had served in this role several times. The interviews produced a collection of statements, referred to as a *concourse* (Stephenson 1978) in terms of Q methodology (Stephenson 1953; Brown 1980; Smith 2001). From this collection of more than 150 statements, 72 were selected as a balanced representation of attitudes toward the role representative of Bion's 4 categories of mental activity in groups: Work, basic assumption Dependency (baD), basic assumption Fight/Flight (baF/F), and basic assumption Pairing (baP) — 18 statements for each of these 4 categories. The statements were Q sorted by 12 staff members, ranging in experience in group relations conference work from 2 to approximately 20 years. Each Q sort constructed by the staff persons represented the sorter's viewpoint about the role and work of the consultants in the small group conference. The Q sorts were intercorrelated forming a 12×12 matrix that was factor analyzed yielding the 4 orthogonal factors shown in Table 1,

interpreted as *Work, Educative, Nurturing,* and *Protective* (Bradley 1987). The factors were associated with levels of consultant experience. An interpretive reading of the items rated highest and lowest on each of the factor arrays showed that these factors could be linked to Bion's (1961) categories of Work, basic assumption Dependency (baD), Pairing (baP) and Fight/Flight (baF/F), respectively. The interpretation of the relationships of the factors to one another was modified upon reexamination of these findings[1] (Lipgar 1993). They were renamed *Group-Interpretive Analyst, Group Facilitator, Collaborator-Participant,* and *Protective Manager,* respectively, and considered complementary components of competency in the consultant's role rather than steps in a hierarchy of experience.

Further examination of data collected in the initial 1986 Q study, revealed that each of the staff consultants whose Q sorts had the highest loadings in the dominant *Work* factor came to serve as directors or associate directors in subsequent conferences. This association of factor profiles with advancement in leadership responsibilities is consistent with the expectation that there is within the culture of conducting group relations conferences in the Chicago/Evanston area a set of attitudes and beliefs that places a high value on Bion's insights into group psychology, his stress on tracking and interpreting group-as-a-whole transferences, projective identifications, and splitting.

There was a single exception to this finding: the factor profile for a staff member in the initial study placed *Nurturing* (associated with baP) above the *Work* factor. This highly qualified individual, closely associated with both the sponsoring institution and the founding director of the conference work here, soon assumed the role of conference director. In subsequent Q studies, after working in the director's role, the individual's factor profile shifted — loadings on the *Work* factor increased and were now higher than the loadings on the *Nurturing* factor, consistent with the others who advanced to higher levels of leadership.

Some Implications of the Initial Study

As an objective map, these findings confirmed the presence of a culture of opinions and standards within which experienced consultants work and are promoted. Orientation toward the consultant's role was an important marker in identifying individual readiness to assume authority and leadership. Further, the reciprocal is also likely to be true: working in positions of authority and leadership influences one's orientation toward the role.

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[1] The re-examination of the 'factor-arrays" (a weighted composite of the rankings of the statements as occurred in those loaded highest in that factor) supported Bradley's finding that these 4 factors are substantially associated with Bion's insights, and can be considered as 4 critical dimensions of effective functioning in the consultant's role (Bradley, 1987). Interpretation and re-interpretation of factors is integral to the methodology of Q studies and can be considered a strength of Stephenson's approach to research.

Table 1: Highest Ranked 'Consultancy' Q Statements by Factor*

Rank	Statement
Factor 1: Work (Group-Interpretive Analyst)	
1	I feel the consultant's most meaningful contribution to the group is his/her sensitivity to the group's transferences.
2	I try to understand what is being put into me and if I am somehow colluding in accepting a projection and not being aware of it.
3	I pay attention to the whole group and to splits in the group and what they represent.
4	I especially keep track of boundary violations.
5	I try to distinguish between what I bring into the group and what the group may be putting into me.
Factor 2: Educative (Group Facilitator)	
1	I believe the main role of the consultant is one of facilitation for the group's own process.
2	I try to help people understand what is work and what is non-work.
3	I look for opportunities to help members see the connection between the impulses and fantasied wishes and the restraints (and defenses) they have developed as a group.
4	I keep in mind what is going on in the larger system of the conference, what this group brings into the room from the conference, and what it may come to represent for the conference.
5	I am diligent in interpreting the de-skilling of the members and their wish to put all the power and knowledge into me, when this occurs.
Factor 3: Nurturing (Participant-Collaborator)	
1	I prefer to use concrete examples of group behavior in my consultations.
2	I want people to understand that there is no magic; that my interpretations come from the same data that they have observed, that is available to everybody.
3	In my interpretations, I often include data that the interpretations come from.
4	I try to present the data to account for my interpretation.
5	I first look for how members' comments and participation reflect attitudes toward the consultant.
Factor 4: Protective (Protective Manager)	
1	I try to avoid interpretations that cause narcissistic wounds.
2	I avoid naming members when I make an interpretation.
3	I seldom speak directly to an individual.
4	Consultations should mirror or reframe work of which the group might be unconscious.
5	If the group is about to act out, I'll step in with an interpretation.

* From composite matrix based on staff Q sorts before and after the 1985 conference.

These intelligible findings are based on a factor analysis with the correlation matrix of only 12 staff members. This study also serves as an example for the use of Q methodology to discover conceptual frames or orientational sets associated with role behaviors of special interest, adding to our understanding of how orientation to the consultant's role is related to learning for leadership and to competence and experience in conference work. The results confirm Stephenson's view that much insight can be gained with small samples and that subjectivity, one's attitudes and values, can be studied scientifically. Q studies can reveal lawful relationships between subjectivity (specifically Q sort behavior, or *operant subjectivity*) and samples of behaviors gathered in experimental design strategies using different circumstances, or *stimulus conditions* (Lipgar 1965).

The usefulness of Q methodology is demonstrated in at least 2 other ways. First, the 4 factors found in the initial study of only 12 staff members appear again and again in each of 8 subsequent conference staff matrices. This constitutes substantive evidence that the psychological dimensions or types generated in the initial matrix are operative, defining meaningful differences among staff groups in other conferences. Specifically, the factor arrays, Q sorts representing each of the 4 factors, were included as prototypes in correlation matrices obtained from staffs in more than 8 subsequent conferences; factor analyses (varimax solutions) of the other staff correlation matrices produced these prototype factors as the highest loaders (in the range of 0.75 to 0.86) among the 5 or 6 factors in the new matrices. Such high levels of consistency in empirical findings is unusual in the social sciences and bears noting, especially considering that subsequent intercorrelation matrices were generated from various conference staffs of different sizes, different personnel and composition, working under different conference directors at conferences conducted with different institutional sponsorship.

Secondly, the heuristic value of these factors seems significant in that they bear a striking resemblance not only to Bion's categories (based on insightful clinical observation), but also to the 4 factors of leadership functions (based on R-methodology) reported by Lieberman, Yalom and Miles (1973) in their study of leadership in encounter groups: 1) *Meaning Attribution*; 2) *Caring*; 3) *Emotional Stimulation*; and 4) *Executive Functions*. The Q factors, Bion's categories, and the Lieberman et al. factors are logically congruent and can be related to the 4 essential functions of social systems described by Edelson (1970) based on Talcott Parsons' *theory of action* (1937, 1951). Edelson (op. cit.) also points out the relation of Parsons' 4 social systems factors to Freud's 4 major structural concepts for the individual psyche: Ego, Id, Ego-Ideal, and Super-Ego. Such interrelationship among conceptual frames developed by different investigators using different methods to study psychosocial systems, should inform further investigations.

Outcome Studies: Members' Learning for Leadership

In 1987, we began the empirical exploration of members' views of leadership in non-residential weekend group relations conferences. We employed a more conventional data collection procedure, one that might appear more familiar to participants, a questionnaire on which conference participants would rank, on a scale of 1 to 4, 68 statements containing 17 four-item sets descriptive of leadership behaviors and attitudes. This was the first step toward developing a Leadership Q sort for use in subsequent conference studies.

Questionnaire data from the 1987 and 1991 conferences were submitted to multi-variate analyses (Lipgar and Struhl 1993). Statistically significant changes were found in the opinions of good leadership during both conferences, changes that were in directions consistent with the educational goals for *working conferences* in the Tavistock tradition.

Registrants responding to this questionnaire before the conference presented an idealized portrait of leadership — the leader as a hero, a cardboard cutout figure of a 10-year-old's ego ideal. In contrast, the portrait of the preferred leader that emerges after conference participation retains many of those idealized characteristics, but is rounded out with greater appreciation and specification of what it takes to function in a leadership role. Instead of a flat black and white portrait, a description emerges with form, depth, and color: leadership connected to members at work and to group process (op. cit. 59).

A comparison of statements ranked highest before and after the conference, shows that members increase their appreciation of the process of functioning on the job. Leadership *traits*, matters of having the *right stuff,* were replaced with statements describing leadership *functions* and interactions, matters of relationships among individuals working together as a group.

Furthermore, in contrast with the 1987 conference where members were impressed with *true grit* and the importance of persistence and personal responsibility; the 1991 conference members valued leadership more openly attuned to the emotional life of the group and actively engaged in protecting group functioning (op. cit. p. 65). However, the views of leadership shifted subsequent to their work in the conference. The views of members from the 1991 conference changed more than those in 1987.

Using the Q sorts for the 1987 and 1991 conference staffs a hypothesis can be offered to account for the differences in learning outcomes: the culture of the 2 staff groups differs, as represented by their different factor profiles. Between 1987 and 1991, a shift occurred in staff orientation to consultancy, considered a key role affecting conference output (Hayden and Carr 1991).

In 1987, the conference staff group was represented by 4 factors in the following order of prominence: *Group-Interpretive Analyst, Group Facilitator, Participant-Collaborator,* and *Protective Manager.* In 1991, the prominence order of the factors changed; the *Group Facilitator* factor ranked

first and the *Group Analyst* factor was ranked second. The staff culture in 1991 was more complex in terms of the factor structure, involving the emergence of 6 factors. The change in the order of the factors (in terms of how much of the variance each accounted for) was parallel to changes in conference members' views of leadership. The shift in the staff culture, more toward a group facilitative mode and away from a strictly interpretive one, implied an appreciation of leadership attuned to teamwork, to the dynamics of people working together as a group, rather than leadership in a more independent and heroic stance.

The results from this study are an example of the use of Q data to explore ways in which conference design and staff functioning may affect member learning. The use of factor scores to map key aspects of staff culture can more objectively examine relationships between conference staff orientation and member learning.

To obtain a closer view, we developed a leadership Q sort based on interviews with experienced staff in addition to the leadership questionnaire designed for the earlier studies (1987, 1991). We used the leadership Q sort with staff and members of the 1995 conference to test several hypotheses.

By examining longitudinal changes in individual factor loadings, we were able to describe changes in member and staff views of leadership, changes in the factor loadings within these 2 groups, and changes in relations of groups and subgroups to one another. Conference cultures and change in terms of their concepts of good leadership can be examined in depth. The factor structures identify and quantify subgroups of opinion: fault lines of diversity in terms of views of leadership. Q studies make it possible to track the direction of change in individuals as representatives of subgroups, identified either by demographics or by roles taken during the life of a conference.[2] For example, factor profiles of men can be compared with factor profiles of women. It is also possible to study the experience and opinions of any particular subgroup.

Figures 1 and 2 illustrate similarities and differences between the 1995 and 1996 conference cultures. Figures 3 and 4 illustrate changes in member and staff views of leadership before and after the conference.

Figure 1 summarizes the factor structure of all staff and members both before and after the 1995 weekend nonresidential conference. The factor structure can be considered a map of good leadership, an important aspect of conference culture. The 1995 conference culture was objectively and quantitatively represented, by 6 factors, and was composed of 6 subgroup views of good leadership: *Group Process Facilitator* (21%), *Action Manager* (11%), *Task Leader* (13%), *Non-directive Egalitarian Leader* (1%), *Professor* (4%), and *Committee Coordinator* (3%). Table 2 contains a list of the high

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[2] In these studies, individuals with particular leadership orientations are examined only as representatives of subgroups and not in terms of their personal histories or traits.

Figure 1: Staff and Member Leadership Orientations 1995 Group Relations Conference

(Based on composite matrix of member and staff Q sorts before and after the conference.)
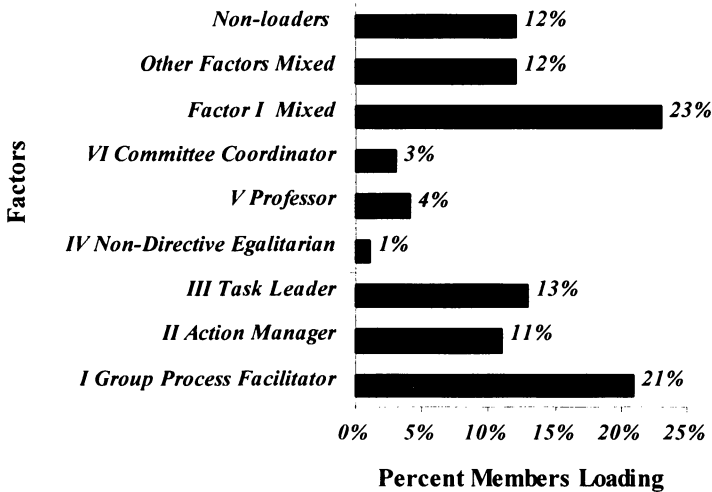

Percent Members Loading

Factors (y-axis, top to bottom):
- Non-loaders — 12%
- Other Factors Mixed — 12%
- Factor I Mixed — 23%
- VI Committee Coordinator — 3%
- V Professor — 4%
- IV Non-Directive Egalitarian — 1%
- III Task Leader — 13%
- II Action Manager — 11%
- I Group Process Facilitator — 21%
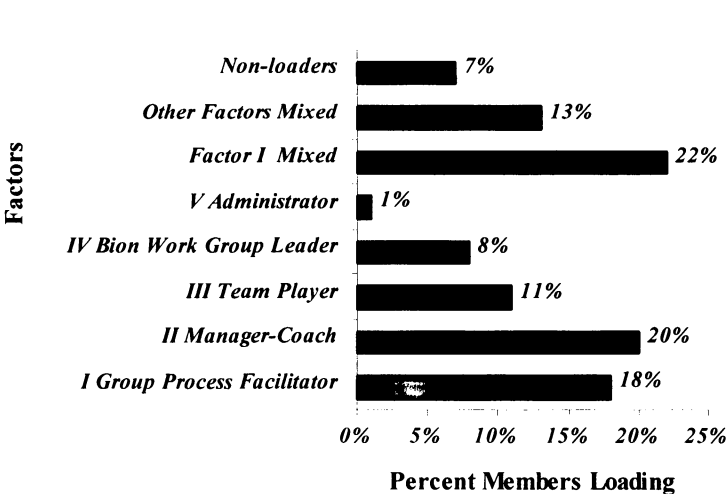
(x-axis: 0%, 5%, 10%, 15%, 20%, 25%)

Figure 2: Staff and Member Leadership Orientations 1996 Group Relations Conference

(Based on composite matrix of member and staff Q sorts before and after the conference.)

Percent Members Loading

Factors (y-axis, top to bottom):
- Non-loaders — 7%
- Other Factors Mixed — 13%
- Factor I Mixed — 22%
- V Administrator — 1%
- IV Bion Work Group Leader — 8%
- III Team Player — 11%
- II Manager-Coach — 20%
- I Group Process Facilitator — 18%

(x-axis: 0%, 5%, 10%, 15%, 20%, 25%)

ranking statements for each of these factors. Another 23% of the staff and membership who loaded on both Factor 1 and on 1 or more of the remaining factors saw the good leader as a combination of the *Group Process Facilitator* and 1 of the other types. They are referred to in the figure as *mixed-loaders.*

Figure 2 shows a different conference culture in 1996. The factor structure shifted slightly, and although the *Group Process Facilitator* type was still present, there emerged an even stronger representation of a *Manager-coach* leader. A comparison of the *Action Manager* type that emerged in 1995 with the *Manager-coach of 1996* shows subtle but important differences in these 2 concepts[3]. Similarly, the *Team Player* has much in common with both the *Non-directive Egalitarian* and *Committee Coordinator* types that emerged in the 1995 conference culture. The *Bion Work Group Leader* represented by 8% of the conference group in 1996 has much in common with the *Task Leader* identified in 1995, but included new subtleties about responding to affects in the group-as-a-whole and with the use of one's self.

Figures 3 and 4, representing 1995 and 1996, respectively, show changes for the members only in relation to composites of the whole conference cultures before and after participation in the work of the conference. These changes are in terms of shifts in members' factor loadings. In both the 1995 and the 1996 conference, there was a dramatic increase in the extent to which members' post-conference Q sorts loaded on the *Group Process Facilitator* factors, providing strong evidence that members valued more highly those leadership attitudes and behaviors associated with facilitating the relationship aspects of group functioning. In both conferences the *Group Facilitator* factors included most of the staff working in consulting roles, and especially the small study group consultants.

Heads of administrative teams were represented as another subgroup by either Factor 2, the *Action Manager* in 1995, or Factor 5, the *Administrator,* in the 1996 conference. Another subgroup was composed of the conference director and 2 other staff members who had broad administrative experience and responsibilities in other settings. These staff were represented in 1996 by Factor 3, the *Bion Work Group Leader,* thus distinguishing them from both the consulting team members on the *Group Facilitator* factor and the administrative team members on the *Action Manager* and *Administrator* factors. Although some members moved toward the *Task Leader* factor in 1995, no members appeared on the more sophisticated *Bion Work Group Leader* factor in 1996 either before or after the conference.

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[3] Q statements ranked highest for the 1996 factor 2, M*anager-coach:* "keeps group focused on task," "gives group structure and guidance," "manages group's time and resources well," and "provides group with inspiration and motivation." Examination of the rankings of all 41 statements elaborated the portrait of a leader as one who provided inspiration, modeling, and mentoring, whereas the 1995 *Action Manager* was seen more as an organizer who got things done.

Table 2: Highest Ranked "Leadership" Q Statements by Factor*

| Rank	Statement
Factor 1: Group Process Facilitator	
1	Able to use his/her own feelings to understand group
2	Recognizes emotional issues affecting the group's work
3	Understands how others influence him/her
4	Reflect aspects of its process to the group
Factor 2: Action Manager	
1	Gets others to feel part of decision-making
2	Manages group's time and resources well
3	Shows persistence
4	Keeps group focused on task
Factor 3: Task Leader	
1	Keeps group focused on task
2	Gives group structure and guidance
3	Capable of abstract thinking and clear speaking
4	Reflects aspects of its process to the group
Factor 4: Non-directive Egalitarian	
1	Values personal and individual responsibility
2	Regards others as equals
3	Harmonizes member's needs with task requirements
4	Able to use his/her own feelings to understand group
Factor 5: Professor	
1	Capable of abstract thinking and clear speaking
2	Tolerates ambiguity
3	Shows persistence in face of obstacles
4	Values personal and individual responsibility
Factor 6: Committee Coordinator	
1	Raises the right questions when things get stalled
2	Respects group's potential
3	Optimistic about member's capacities
4	Gets others to feel part of decision-making

* From a composite matrix based on staff Q sorts before and after the 1995 conference.

Figure 3: Group Relations Conference 1995 Members' Changes in Leadership Orientations
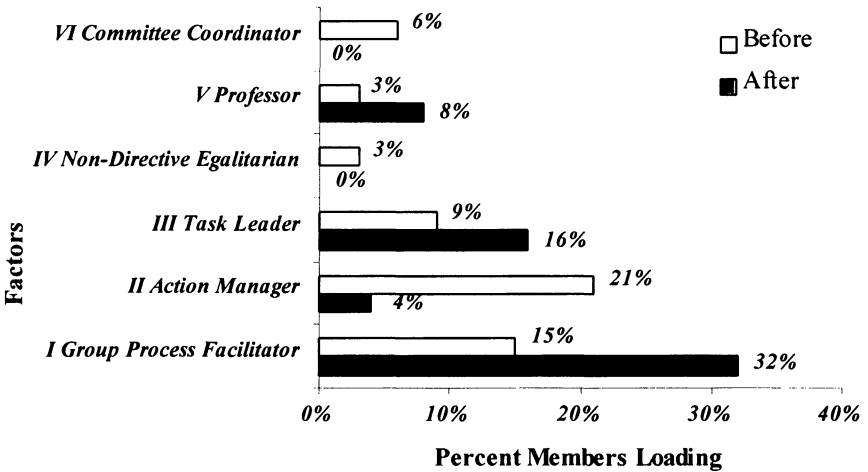
(Based on composite matrix of Member and Staff Q Sorts before and after the conference. Trends presented in terms of percentages based on "pure loaders" in each factor. When mixed-loaders were included, the profiles were essentially the same.)

Figure 4: Group Relations Conference 1996 Members' Changes in Leadership Orientations
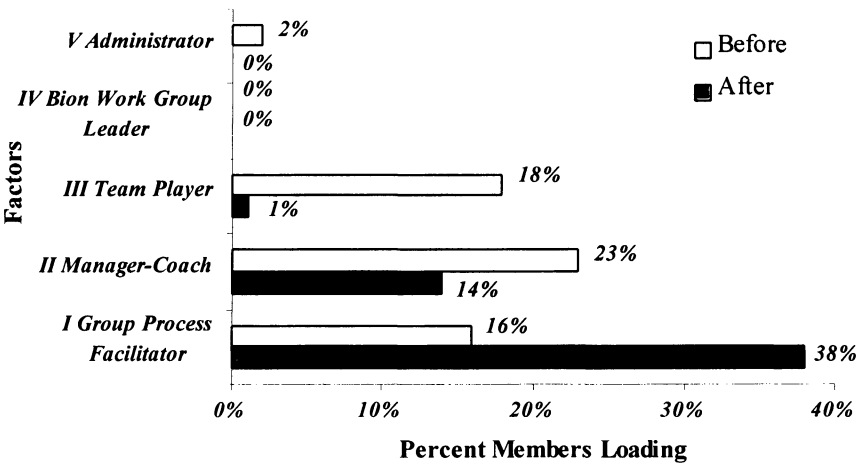
(Based on composite matrix of Members and Staff Q Sorts before and after entering the conference. Trends presented in terms of percentages based on "pure loaders" in each factor. When mixed-loaders were included, the profiles were essentially the same.)

In order to test the hypothesis that subtle and sophisticated learning about authority and leadership, as represented in the *Bion Work Group Leader* factor, does not occur during a weekend non-residential conference, it would be necessary to design and conduct a future Q study during 1 or more 5-day or 9-day residential conferences. If confirmed, findings would be consistent with the belief generally held among members of the A. K. Rice Institute that 9-day national conferences provide in-depth opportunities for learning not accessible in non-residential weekend conferences, even though the conference design and methods used are quite similar.

Research activities in the 1996-98 conferences included conventional evaluation questionnaires to provide data on how members rated the conference experience and its component parts, i.e., small group, large group, intergroup, conference plenary discussion, and review and application group experiences. Responses on the questionnaires also provided ratings of the effectiveness of staff in each of these events. During the 1996 conference, the most intensively researched in this series, we obtained ratings from small group consultants about their own and each other's contributions to teamwork. Additionally, the research staff attended small group team meetings as observers and rated the small group consultants' contributions to the team's work. The additional data allowed the exploration of links between staff behavior, conference culture, and member learning.

Linking Staff Performance to Member Learning
Empirical studies conducted during the 1987 and 1991 conferences demonstrated that learning takes place in terms of statistically meaningful changes in views of leadership (Lipgar and Struhl 1995) and that factor profiles of orientations to the role of small group consultant (Bradley 1987; Lipgar 1993) were useful as objective ways to map key aspects of staff cultures (Lipgar and Bair 1997). In order to examine the relation of staff orientation to staff behavior and consider linkages to member learning, we compared the learning in small study groups. Questions examined included each consultant's views of leadership, peer ratings of contributions to teamwork, observer ratings of consultant contributions to the team, member ratings of consultant contributions to the small group, and members' views of small group learning. Evidence was found to support member learning about leadership, as inferred from shifts in factor loadings before and during conferences.

As expected, peers on the Small Group Consulting Team rated the designated head of their team as the most effective among their group of 5; the research observers were less likely to rate the team head in this way. One of the small group consultants seemed to be regarded as most effective, both in member ratings and, more importantly, in the movement of group members from 1 factor to another during the conference. This seemed significant, because, although he was less experienced than the head of the consultant

team, he was the only consultant to load on the *Bion-Work Group* factor along with the director. Members of this consultant's group tended to show the most movement from 1 factor to another. Movement tended to be in the direction of the *Group Process Facilitating* factor, where most of the staff was located. This factor places more value on facilitating than on analysis or interpretation of the dynamics of the group as a whole. *Group Facilitators* tend to emphasize group process and responding empathically to the emotional life of the group, which is virtuous and positive. This emphasis is not quite the same as the true Bion stance. The *Bion Work Group Leader* is group-centered, but attends also to task, structure, and use of self in understanding the group process, sorting out what are projections and what are the consultant's personal issues.

Q methodology provided objective quantitative data to build and test hypotheses about multi-leveled interactions within social matrices. Q studies data combined with other data enhanced our understanding of on-the-job performance in relation not only to contractual and covert role assignments, but also to authorizations in the context of working groups and organizations. This illustrates another use for Q study results: hypotheses are brought to the analysis of the data and refined or shaped for further investigation. New hypotheses may be developed for examination, thus supporting what Stephenson and others have termed *abduction* using the terminology of American philosopher Charles Peirce.

Learning Styles and Group Participation

In the 1997 conference, we began to use Q sorts to explore the process of *learning by experience* — how do people engage in the work of these conferences? How do different learning styles affect educational outcomes? A Q sort composed of 34 statements was selected from a concourse about people's views of themselves as participants and learners in important educational activities. The learning styles Q sort allowed us to advance several steps in understanding how members and staff engage experientially in conference work. For the first time, Q data could be analyzed during the conference. Since a research period of ½ hour had been scheduled on Saturday afternoon for all staff and members to construct Q sorts, it was possible for the research team to process the data and report findings to staff during the evening. The next day the results were reported to the entire conference during the plenary review session. Because of this procedural innovation, learning from the research was *authorized* as part of the work of the conference. The high level of cooperation obtained during the 1997 conference for a real time research project reflected the excellent cooperative work of the research team.[4] Before the conference, all staff and 38 of 43 members constructed Q sorts, and during the conference, all members and staff sorted.

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[4] John P. Bair, Ph.D., Assistant Director for Research and head of the 1997 research team consisting of Steven R. Brown, Ph.D., Clive Hazel, Ph.D., and Ann Kaplan, Ph.D.

The ability to analyze the data and report initial findings in a plenary conference review session, made data collecting and analysis an integral part of the discovery and discourse processes, thus reinforcing social system study objectives as components of the conference. The research team delivered their interpretation of the factors in the form of brief monologues, giving the factors a *voice,* as though each factor were a member participating in the open dialogue and discourse of the plenary review session. Individual factor loadings were not announced, and no discussion was held about methodological or theoretical matters.[5]

In the pre-conference correlation matrix, 3 factors were identified, 2 of which were bi-polar. During the conference, 2 more factors emerged. The report of research findings did not stir much discussion during the "plenary review session" or the "final" review and application sessions. Since this was the first time in our conference work that real time research data analysis was introduced as an integral part of the learning opportunities and experience, it is perhaps not surprising that more exploration did not occur. Nevertheless, the report raised staff awareness of the different learning styles and provided insights about ways members join or resist joining various conference tasks.

During the conference, discussion and review of the Q findings can illuminate and identify covert processes that advance or inhibit learning. However, another factor solution based on the same intercorrelation matrix was explored several months after the conference. It revealed 7 styles of participation and learning (listed here in decreasing order of the amount of variance each accounted for in the matrix): 1) Belief that learning requires engagement, both with others and with inner feelings; 2) Self-reliant (perhaps counter-dependent), self-possessed, and self-authorizing; 3) Thoughtful engagement of inner feelings and others in the "here and now;" 4) Cooperative acceptance of authority and structure, harmony seeking; 5) Assertive, competitive with authority, willing to express dissent and conflict; 6) Willingness to work with difficult emotions (i.e., anger), but requiring structure and authority in order to be interactional; 7) Responsive, dependent on and reactive to situational aspects. The factors and their relative prominence provided a quantified representation of the 1997 conference and an objective basis for exploring similarities and differences with other conference cultures. This particular structure could be used as preparation for further work, a baseline against which to compare and contrast future conference cultures. Hypotheses could be considered about the relationship of member and staff orientations to learning, satisfaction with the experience of various conference events, and the nature and extent of changes in concepts of leadership before and during the conference.

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[5] Prior to the conference and during the plenary opening, members had been invited to address inquiries about the research to the assistant director for research or the author as conference director.

During the 1997 conference, we collected questionnaire ratings from members regarding their evaluations of the conference program and the consultants. We asked small group consultants to rank the members of their groups in terms of the quality of their involvement as "workers." Research observers ranked the contributions of the small group consultants to the work of their teams. Each consultant's small study group was characterized in terms of the factor loadings of the members, while each consultant was characterized in terms of orientation to the consultant's role. The dynamics of factor loadings before, during, and after the conference served as an indicator of the kind of learning that occurred. Together with other ratings and anecdotal reports by staff and members, qualitative case study comparisons of the consultants' work and that of their groups were attempted.

Our aim here was two-fold: 1) To develop hypotheses (a, b, and c) about the function of: (a) consultants (as psychological work leaders, in Bion's sense, with (b) the views members hold of good leadership (as an indicator of educational outcome) together with (c) the styles of participation and learning that characterize conference members. 2) To obtain objective evidence to support hypotheses about the ability of consultants to facilitate effective learning among group members. This is an on-going program of research in which methods as much as subjects are on trial (Lipgar 1992b), and in which Q methodology has been found to be a flexible and powerful tool.

Staff Relations and Development

The director's commitment to include research as an integral part of the conference altered group dynamics within the conference staff. Relationships among teams were affected. Feelings of competition, inevitably part of staff dynamics, were stirred in unfamiliar ways. The researchers were viewed as interlopers, technocrats who had little appreciation for the members' struggles with conference objectives and who had neither real commitment to the Tavistock tradition nor understanding of the primary task. The research team explored strategies to reduce feelings of envy toward the consulting team who had direct contact with the membership. They felt "left out." Both reactions, left unexamined, could have affected staff performance negatively and jeopardized the success of the conference.

While tensions emerged among the staff throughout the conference and were part of the work, they were most often exposed and turbulent in the inter-group or institutional events. At these events intra-staff relations were naturally under scrutiny, since members, representing their own groups in various roles, could attend and interact with the staff (as one of the working groups) in this part of the conference program. Unless there had been some meaningful work addressing staff relations prior to these sessions, the ability to use research findings and explore feelings and fantasies stirred by the presence of the "other set of eyes," could have been impaired.

One anecdote can serve to illustrate the depth of feelings that emerged. During the institutional event (one of the *here and now* sessions in which research staff are not restricted to the role of observers), a conference member, in the role of a plenipotentiary, raised a question for discussion with the staff and addressed one staff member by her first name. Motivated perhaps by a need to have more direct contact with members in order to participate in the "real work" of the conference, one of the research staff described what he had perceived to be an inappropriate presumption of familiarity by the member. This interpretation registered as an affront to the member and she left the conference, missing the final 3 events of the weekend. The addition and authorization of a research team changed staff structure and dynamics in significant ways. Our lack of experience with these new challenges left the director and staff unprepared to deal with the incident in a constructive way that might have convinced the offended member to remain with the conference and thereby could have enhanced learning for both members and staff.

Authorizing the research team to carry out the research tasks raised new questions about role boundaries, particularly concerning authorization of the consulting team to function as primary interpreters of conference dynamics. What were the relative merits, power, and credibility of interpretations based upon different kinds of data? When would it have been appropriate, when could it have been helpful, to make interpretations based upon research findings rather than clinical observations, and when might it have been appropriate to present the data upon which interpretations had been based?

Staff became more uncertain about their roles and authorizations. Anxieties about being inadequate, or being seen as inadequate, increased. The need to assert the legitimacy and relevance of one's insights led at times to heightened intra-staff competitive tensions. Anxieties raised in staff meetings were sometimes expressed quite directly in terms of "Whom did the director love more?" Issues involving the relationship between the humanities or liberal arts and the sciences, usually handled less openly in academic circles, were experienced by the staff and explored in the conference in much more personal terms.

In 1996, two post-conference review sessions were held specifically to discuss orientations toward consultancy as represented in the individual Q sort factor profiles in order to prepare staff to work together. Review session preparation included printing each staff member's name and position on the factor structure. Five factors accounted for the staff intercorrelation matrix, which was comprised of Q sorts from before and after the conference for each staff member. Three staff defined a factor named *Group Process Facilitator* and accounted for the largest portion of the variance in the matrix. Other factors defined by more than 1 staff person included *Mentor-coach*; and *Bion Work Group Leader*.

Staff who attended the post-conference review discussion explored not only technical matters (such as how the research was conducted and the meaning of "loading on a factor"), but also substantive issues of how consultants could best contribute to the work of the group and to member learning. Some of the competitive feelings and anxieties about "being scrutinized by the director and one's peers" were also explored. This opened discussion of individual staff member views of consultancy and perceptions of self-competence. Relations between the research team and staff became more collaborative in 1997. Using post-conference meetings to review research findings in detail and discuss the ways to integrate research with conference learning provided new opportunities to share staff work experiences and advance the purpose of conference workshops.

A Work in Progress
Group relations conferences, treated here as social laboratories — microcosms of larger institutions — traditionally not only provide distinctive opportunities for learning, but also can be structured and conducted as challenging contexts for testing self-study research methods. Selecting research questions, determining which aspects of these temporary educational institutions to investigate, and selecting techniques for data collection and analysis must be considered in the context of the primary group learning tasks. Integrating research activity with the traditional work of the conferences necessitates finding new ways to solicit and maintain staff and maintain active member participation to enrich the overall educational experience.

Our experiences, obtained over more than 10 years conducting research as part of group relations conferences conducted in Evanston and Chicago, Illinois, carry implications for outcome evaluation and self-study in other educational, institutional, and organizational contexts. Research that is planned and supported as on-going endeavors in organizational settings can advance learning for all participants by providing ongoing feedback and review.

Q methodology can enhance our understanding about how members learn, how consultants contribute to the psychological work of the conference, and how leadership functions both in member groups and among staff. To extend and understand the interactional functioning of different systems within social matrices require both quantitative and clinical methods. Learning and knowing, as well as leadership — psychological and managerial — take place in social matrices and are functions of them. People approach their work as learners, and exercise their authority and leadership in different ways. They also engage in learning by experience along several dimensions: openness vs. defensiveness in relation to the social matrix; acceptance vs. defiance of authority; responsiveness to internal vs. external stimuli. Deeper and more comprehensive *knowledge-of-acquaintance* of authority, leadership, groups, and organizations, as well as testable hypotheses and scientific knowledge —

all can be gained and communicated from results of appropriately designed Q methodological studies.

The 3 major components of a *working conference* in the A. K. Rice/Tavistock tradition include: 1) the role of the consultant as a psychological leader based primarily on the group work of Wilfred Bion (1961); 2) learning for leadership as the primary goal-oriented task; 3) learning by experience as the method (Rice, 1965). The design of the conference events, the general philosophy of management and consultation, the emphasis on task and boundary management, as well as the encounter and management of anxieties integral to learning by experience, all follow from these 3 components. Our research efforts, therefore, have been directed to learning more about consultant behavior and values, leadership behavior and functions, and the process of participatory group learning.

The penetrating power of Q methodology and its adaptability make these experiential and profoundly personal, yet communal, journeys possible and instructive. Together with the intensive encounters engendered in group relations conferences, the scientific inquiries of *operant subjectivity* enable us to combine the riches of the domain of feelings, fantasies, and values with the discipline of quantification and statistical analysis.

Conclusions

Among the results from the Q studies conducted during a series of conferences which show the usefulness and power of this research approach are: 1) objective mapping of critical dimensions of the consultant's role; 2) objective mapping of significant aspects of conference cultures; 3) quantification of changes in understanding of leadership among members and staff before and after the conference; 4) abductive development of hypotheses specifying some covert processes that may affect staff effectiveness as *work* leaders; and 5) preparation of new hypotheses relating specific leadership and learning variables.

Research findings can also be used to refine conceptual frameworks about leadership and group dynamics. Factors representing different consulting stances were remarkably consistent over several conferences. Furthermore, the factors represent an objective conceptual map of leadership dimensions and consultancy functions. The factor loadings of individuals were correlated not only with the amount of experience subjects had in the consulting role, but also with satisfaction ratings assigned by registrants while reflecting on their small group experiences. The dimensions of the consultant role as mapped by Q factor analysis bears striking resemblance to dimensions of leadership functioning as developed by researchers using other investigative methods and settings (e.g., Bion; Lieberman, Yalom, and Miles; Edelson/Parsons).

With Q methodology, a scientific approach to qualitative research about subjectivity, nuances of complex subjective experiences and inter-subjective

dynamics can be objectified, quantified, and integrated into the primary educational mission of any organization or institution. The studies described here raise questions important for understanding group psychology in general and group relations conference work in particular: 1) To what extent is it virtually inevitable that groups move away from the difficult tasks set forth by the founders, tasks which inspired them? 2) Are there common dimensions, forms, and structures underlying particular manifestations of orientational sets, values, and attitudes at any particular time and in any particular organizational setting? 3) Is the search for lawful relationships among such variables as *leadership* and *consultancy stance*, *learning style*, and *learning-of-acquaintance* in conflict with group experiential learning? 4) Will the A. K. Rice Institute and Tavistock tradition, so inspired by Bion's work and vision, become in contemporary practice another movement to facilitate cohesiveness and belongingness at the expense of the hard work of learning, growth, and adaptation?

In the most profound sense, both Bion and Stephenson studied learning and knowing: how personal experiences inform our thoughts, knowledge, and actions; how personal experiences are shared and transformed both as "common sense" and as sophisticated knowledge. With different but not incompatible contributions, both Wilfred Bion and William Stephenson bring us further along the journey of exploring the unknown, symbolizing the as-yet-unspoken, and giving voice to thoughts waiting to be born — searching "concourses of communicability." By integrating group relations conference work with Q studies, we cross the threshold to new ways of learning, new ways of sharing our learning, and new ways of creating knowledge about leadership and community.

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