CENTER FOR
Courage
& Renewal

Evaluation of *Circle of Trust* Retreats

Summary Report

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CONTENTS

1. EXECUTIVE SUMMARY

This evaluation explored the impact of circle of trust (COT) retreats and the learnings and personal and professional applications in the lives of participants. The *Center for Courage & Renewal* (CCR) began offering COT cross-professional retreats in 2005, to provide people with an opportunity to experience a 'circle of trust' as described in Parker J. Palmer's book, *A Hidden Wholeness: The Journey Toward An Undivided Life*. The evaluation was conducted in April-May 2007, and consisted of two components: an on-line questionnaire for people who had completed at least two COT retreats and interviews with some participants and personnel involved in the development and delivery of COT retreats.

The evaluation had an extremely **high participant response rate**, which appeared to reflect both the gratitude of respondents for their very positive COT retreat experience, and their desire to give back to and remain connected with the COT / CCR community. **93%** of those who were invited to participate in the evaluation responded (40 of 43), with 91% completing the on-line questionnaire (39 of 43). 97% of respondents offered to participate in a follow-up interview (38 of 39). Twelve phone or in-person interviews were conducted; including seven with COT participants and five with staff involved in the development and delivery of COT retreats.

The evaluation revealed that COT retreats are extremely well designed and delivered, highly regarded by participants and very relevant to participants' personal and professional needs. Respondents were **overwhelmingly positive** about their COT retreat experience. The vast majority of respondents reported that COT retreats are not only deeply meeting their needs, but are *exceeding* their expectations. 77% of questionnaire respondents said that COT retreats had exceeded their expectations, with the remaining 23% stating it fully or mostly met their expectations. It is significant that 77% reported that the COT retreat exceeded their expectations, as all of these respondents had previously attended a COT, and knew what to expect. The retreats seem to mainly cater to people who are already familiar with various kinds of inner work, but who attend COT retreats to deepen and affirm their reflective practice, and to enjoy the connection with and support of a community that engages in inner work.

The cross-professional nature of COT retreats appears to be highly successful. Most importantly, the evaluation revealed that regardless of their profession, participants are extensively applying their learnings from COT retreats in diverse and myriad ways in both their **personal and professional lives**. All the questionnaire respondents and interviewees cited rich examples of professional and / or personal applications of COT learnings. A significant number of respondents stated they had attended the COT retreat to experience a circle of trust after reading Parker J. Palmer's *A Hidden Wholeness*. Many respondents reported that they have established or are in the process of establishing circles of trust in their communities as a result of their COT retreat experience. Interviewees reported that they find COT retreats highly distinctive and appreciate the ways that COT retreats differ from, and more fully meet their needs than, other professional development opportunities. In particular, interviewees noted COT retreats provided lifelong learnings such as reflectivity, intentionality, self-awareness, listening, questioning and group work skills.

Although the evaluation did not explicitly seek feedback on the development, management and delivery of COT retreats, unsolicited feedback in the questionnaire and interviews and my own observations revealed that all **personnel involved in the development and delivery of COT retreats are working cohesively and effectively** to develop and deliver high quality and well-respected programs. The quality and effectiveness of COT retreats appears to result from the combination of: Parker J. Palmer's initial conceptualization and articulation of circles of trust in *A Hidden Wholeness*, the CCR Co-Director's vision for and translation of the concept into COT retreats, the COT Manager / Registrar's wise management of retreats and the high quality of facilitation of COT retreats. Respondents particularly praised the COT 2 / 3 facilitators for their wisdom, generosity of spirit, competence, flexibility, presence and capacity to hold an inviting, safe and open space.

An unexpected but welcome outcome from this evaluation was the **generative and positive outcomes** experienced by participants as a result of participating in the evaluation. Respondents commented in both the questionnaire and interviews that the evaluation had provided a helpful catalyst for them to review, reflect on and continue their COT learnings. It is hoped that the CCR will be strengthened and encouraged by this feedback on the ongoing importance of reflection in participants' lives, and receiving such overwhelmingly strong affirmation about the quality and relevance of COT retreats. It is anticipated that these findings will assist the CCR to further promote its work by demonstrating tangible benefits and learnings for COT participants in both their personal and professional lives.

As the overall tenet of this evaluation report is one of commendation, there are only a limited range of opportunities for suggested improvements, and the recommendations arising from this report are relatively minor. Whilst all respondents were extremely positive about their COT experiences, some mentioned **minor ways in which their experience could be improved**. A significant number of respondents requested accommodation in single rather than shared rooms during COT retreats. Other suggestions for improvement included receiving more guidance on the pathway to facilitation and more opportunities to talk during COT retreats about participants' professional applications of COT principles. Many respondents requested additional ways to connect and communicate with the COT / CCR community. There were small numbers of people who struggled with some aspect of COT retreats including the artwork, mealtimes, the walk and talk, journaling, the amount of sitting and the length of the retreat (too short). However, for each of these comments, many more respondents praised these same aspects. It is important to note that the majority of respondents said that they couldn't think of anything that could be done to improve their COT experience.

Overall this evaluation is extremely positive, and highly commends all CCR staff and personnel involved in the development and delivery of the COT retreat program. It is evident that COT retreats are highly successful, and are not only profoundly meeting participants' needs, but are exceeding their expectations. All participants were overwhelmingly positive about their COT experiences, and have widely and creatively applied their learnings in both their personal and professional lives.

2. BACKGROUND AND PURPOSE

This circle of trust (COT) program evaluation was commissioned in early 2007 by the *Center for Courage & Renewal*. The CCR began offering COT across- professional retreats in 2005 and as they have now been offered for nearly two years, it seemed timely to explore the impact and success of the retreats, and the personal and professional learnings and experiences of participants. The purpose of the evaluation was therefore to elicit:

*   COT participants' expectations, motivations, experiences and demographics
*   participants' personal and professional applications resulting from participation in COT retreats
*   identification of and recommendations for improvements to COT retreats
*   identification of and recommendations for ongoing COT evaluation

3. EVALUATION METHODS

This evaluation was conducted in April-May 2007, and consisted of two components: an on-line questionnaire for participants, and phone or in-person interviews with a small number of respondents and personnel involved in the development and delivery of COT retreats. From the commissioning of this evaluation in February 2007 to the completion of the report in June 2007, the evaluation approach and methods have been designed in collaboration with the CCR.

As one of the purposes of the evaluation was to find out about participants' personal and professional applications resulting from COT retreat attendance, it was felt that the evaluation would yield more useful data if participants who had done at least two COT retreats were targeted. Consequently, participants who had done at least two COT retreats during 2006-7, with at least one of these retreats being an Intermediate (COT2) or Advanced (COT3) retreat were selected. In a small number of cases, some of the participants who were included had only done one Intermediate or Advanced COT, but had participated in another national or local retreat such as Courage to Teach®. Any clergy who were already involved in the Courage & Renewal for Congregational Leaders initiative, which is being separately evaluated, were excluded. This left a potential pool of 43 participants.

The questionnaire (attached) was designed in collaboration with the Co-directors of the CCR. An on-line questionnaire format was used to facilitate easy management of data while providing a user-friendly and convenient option that would maximize participation without compromising confidentiality. The questionnaire was developed using *SurveyWriter*, and sought to capture quantitative and qualitative data and elicit information such as:

*   participant background (demographics, professional role, experience)
*   interest and motivation for participation in COT retreats
*   Satisfaction with and experience of COT retreats
*   personal and professional applications of COT learnings
*   willingness to participate in a follow-up phone interview

Two weeks before the questionnaire was launched, an email was sent to the 43 participants informing them of the forthcoming evaluation. Although this email did not necessitate a reply, approximately 10 people responded, stating their willingness to be involved. Several people commented that this process was useful for their own reflections, with one participant replying "yours is a timely request as I become more conscious of how those experiences are informing my life and its work". The questionnaire was launched via email in mid-April, and participants were provided with a web link to the questionnaire and informed of the 2-week timeframe for completion. An email reminder was sent to participants half way through the 2-week period.

The response to the questionnaire was quite extraordinary: 93% of those who were invited to participate in the evaluation responded (40 out of 43), with 91% completing the on-line questionnaire (39 of 43). One person chose to respond via email rather than completing the on-line questionnaire. Respondents provided detailed, soulful and trusting responses to the questions (see further discussion in Section 6).

97% (38 of the 39) of respondents who completed the questionnaire offered to participate in a follow-up phone interview. As a result, 9 respondents were invited to participate in an interview, but only 7 were available in the allocated timeframe for interviews. The criterion for choosing interviewees was:

- diversity of age, gender, ethnicity and profession
- people who cited applications of their COT learnings in their personal and / or professional lives

The semi-structured follow-up phone interviews with participants were conducted one to two weeks after the questionnaire was completed. The questions were designed in collaboration with the Co-directors of the CCR to glean more detail about specific areas of interest. The interviews were not recorded or transcribed, and notes were taken by the Evaluator during the interview to capture responses. Interviewees entrusted us with wonderful and rich stories and learnings from their COT experiences (see further discussion in Section 6). After the interviews, the responses were categorized and sorted into themes and patterns and responses to specific questions. The three open-ended questions posed to interviewees were:

- Can you please give me specific examples of how you have applied your COT learnings / experience to your personal and / or your professional life?
- In your professional field, how do COT retreats compare to other Professional Development that you have participated in?
- We know it's sometimes challenging to describe what takes place in COT retreats and the impact it has on participants' lives and work. How have you described this work to others, and what language seems to "communicate" the experience most effectively?

CCR personnel involved in the development and delivery of COT retreats were also interviewed after the questionnaire was completed. Some of these interviews were conducted by phone and some in person. The interviews were not recorded or transcribed, and notes were taken during the interview. The interviews included the Co-directors of the CCR; the Registrar for COT retreats; and the facilitators for the COT2 / COT3 retreats. The Evaluator also had a conversation with Parker J. Palmer. The questions posed to CCR personnel involved in COT retreats were:

- What is your role and involvement with COT retreats?
- Do you have any observations / evidence of what people get out of COT retreats?
- What changes / trends have you observed?
- What do you think has worked well?
- What do you think hasn't worked so well?
- What are the barriers / challenges?
- What are the opportunities?
- Is there anything you would like to change?
- What do you see as the future of COT retreats?
- Do you have any other comments?

The Evaluator

Janet Smith, Ph.D. is the Deputy Head of School and Discipline Head of Curriculum Studies at the University of Canberra in Australia, where she lectures in the Masters of Educational Leadership program for teachers and trains high school social science pre-service teachers. Her current research focuses on the engagement and renewal of teachers in schools and higher education, and on the social, emotional and spiritual literacies of students and teachers. Her PhD thesis was about the formation and experience of male elementary teachers, and her Masters of Education was on gender issues in schools. Prior to becoming an academic in 1994, Janet occupied a variety of leadership positions and taught geography and history in Australian public high schools. In 2007, Janet spent part of her sabbatical working with the *Center for Courage & Renewal*, and conducted the COT evaluation during this time.

4. HISTORY AND DESCRIPTION OF COT RETREATS

In the early 1990s, Parker J. Palmer created and developed the *Courage to Teach* (CTT) series of retreats in Kalamazoo MI, with the assistance and support of the Fetzer Institute. This series of retreats designed for teachers was grounded in an approach to professional development known as teacher 'formation'. The formation process focuses on the inner lives, personal renewal and reflective practice of teachers, rather than on teaching skills or knowledge. In 1996-1998, CTT retreats were successfully piloted in four locations across the USA. In 1997, the Fetzer Institute established *Center for Teacher Formation* (CTF) to expand this work and prepare facilitators. The work gained further momentum with the publication of Parker J. Palmer's book *The Courage to Teach – Exploring the Inner Landscape of a Teacher's Life* in 1998. CTT retreats grew in number and popularity over the ensuing years, and large numbers of CTT facilitators were trained. A 2002 external longitudinal evaluation of CTT noted that 'the evaluation data establishes the CTT program as an exemplary and unique model of professional development' (Intrator & Scribner, 2002:14).

As the success of the work with K-12 educators became more widely known, people in other serving professions began to ask to also be included in these formation retreats. In 2003, in response to the growing interest in formation work from other serving professions, a cross-professional Courage & Renewal Facilitator Preparation Program was piloted. The 2004 publication of Parker J. Palmer's book, *A Hidden Wholeness: The Journey toward an*

undivided life further publicized this work and created an increased demand for this work in other professions. Consequently, five national cross-professional retreats were offered during 2005. Due to the expansion of this work to other serving professions, the CTF became the *Center for Courage & Renewal* (CCR) in 2005. Since then, the Center has maintained an abiding commitment to education but also offers retreats to people in other serving professions, through some programs focusing on a specific profession, and others that work 'across professions'. In 2006, a 3-tiered cross-professional series of circle of trust (COT) retreats was developed:

1. **Introductory** retreat (COT1): *The Journey toward an Undivided Life* (3-days)
2. **Intermediate** retreat (COT2): *Living the Questions*, for people who have already attended an Introductory circle of trust retreat (4-days)
3. **Advanced** retreat (COT3): *Welcoming the Soul and Weaving Community*, for people who have already attended an Introductory and Intermediate circle of trust retreat (4-days)

Since the first COT retreat was offered in 2005, the CCR has conducted eleven COT1 retreats, three COT2 retreats, and one COT3 retreat, involving approximately 300 participants. COT retreats have been extremely popular and most reach capacity well before the retreat. They are designed for people who want to deepen their interactions and conversations in their workplaces, churches, or communities. They also enable people who have read Parker J. Palmer's *A Hidden Wholeness,* which outlines the principles of a circle of trust, to experience a circle and to understand more about the conditions that help create such circles. Parker J. Palmer says that the purpose of a circle of trust 'is to support the inner journey of each person in the group, to make each soul feel safe enough to show up and speak its truth, to help each person listen to his or her inner teacher' (Palmer, 2004:54). No prior experience is necessary to attend COT1, but each successive retreat builds on the previous one. Participants can attend just one retreat or attend all three. In COT2 and COT3, participants have the opportunity to consider ways of taking this approach back to their particular setting. The COT retreats are not intended for facilitator preparation. COT participants wishing to consider more formal facilitator preparation are encouraged to attend CCR's annual Gateway Retreat and subsequently apply for the Courage & Renewal Facilitator Preparation Program, if interested.

Whilst each of the COT retreats has a slightly different focus, there are strong commonalities between all three retreats, and with other retreats offered by the CCR. All CCR retreats involve circles of trust that aim to provide people with the opportunity to 'rejoin soul and role' or 'reconnect who they are with what they do'. COT retreat facilitators seek ways to create spaces that are safe, quiet, focused and inviting, so that participants can begin to hear their own inner voice and their souls 'feel safe enough to show up'. In large group, small group, and solitary settings, participants explore the intersection of their personal and professional lives, using stories from their own journeys, reflecting on their work and practice, and using insights from poets, storytellers, and various wisdom traditions. Other characteristics of COT retreats include the use of silence, reflection, asking honest and open questions, clearness committees and the use of 'third' things such as poetry, prose and metaphor. Each of the COT retreats includes guidelines, sometimes called 'touchstones' or 'boundary markers' that establish norms and respectful boundaries for working together (the information contained in these last two paragraphs has been paraphrased from the CCR website).

5. PROGRAM RELEVANCE

Whilst this evaluation mainly focuses on evidence elicited from participants and staff *within* the COT retreat program that it is effective, there is also important *external* evidence that is discussed below that confirms and demonstrates the need for programs such as this.

5.1 REFLECTIVE PRACTICE AS A FORM OF PROFESSIONAL DEVELOPMENT

There are many different types of professional development (PD) currently offered within the serving professions, ranging from didactic and skills-based to values and meanings-based. A form of PD found within the latter category, known as 'Reflective Practice', has become increasingly popular for those in the serving professions. COT retreats are located within this genre of PD, as they allow people to engage in professional renewal, reflection and attentive presence about their professional and personal practice and sense of vocation. Although reflective practice PD has many subsections and diverse meanings, it is now firmly established as a legitimate form of PD across all serving professions. It has also become very common and popular within the field of personal development. The various subsections of the reflective practice genre of PD are known as transformational / transformative work, professional renewal, life-long learning, inner-work, self-awareness, self-development, critique of practice and critical thinking. The field of adult education is now firmly based on principles such as active and reflective inquiry, rather than outmoded notions of passive reception of transmitted content (Knowles, 1990:27). It should be noted that reflective practice within the serving professions is also learnt in ways other than professional development. For example, reflection is a fundamental tenet of practices such as mentoring, critical friendships and action research.

Reflective practice is essentially a way of helping practitioners participate in a critique of their professional and personal practice in order to achieve a better understanding about what they know and do, and to learn through questioning (Day, 1999). It also involves careful consideration of both 'seeing' and 'action' to enhance the possibilities of learning through experience, and the ability to 'frame' and 'reframe' the practice setting so that the practitioners' wisdom-in-action is enhanced (Loughran, 2002). The key characteristics of reflective practice professional development are the use of small group and large group conversations / dialogue, silence, story telling, documentation of journey, reflective journaling / guided reflection, use of artifacts, poetry, art, music and attention to metaphor and paradox. Bolton suggests that within reflective practice 'the narratives and metaphors by which we structure our lives, the taken-for-granteds, are questioned and challenged: making the familiar strange, and the strange familiar' (2005:109). Reflective practitioners are also encouraged to note paradoxes such as how our individual stories are tied to universal ones. Brookfield suggests that reflective practice helps us to realize that 'what we thought were idiosyncratic features of our own critically reflective efforts are paralleled in the experiences of many of our colleagues' (1995:219).

Although critically reflective practice literature is now emanating from most of the serving professions, teacher education is the major locus of this literature. Increasingly, professions such as nursing and medicine are also embracing this genre of PD and scholarship. It is apparent that reflective practice has much to offer all the serving professions. For example, there is ample evidence of high attrition and burnout rates in the teaching profession (Darling-

Hammond, 2003:7, Intrator & Kunzman, 2006:18). The possibilities that reflective practice offer for renewal and for potentially arresting attrition rates are significant. It is also widely known that workplaces such as schools can be very lonely places for adults to work, as they frequently don't allow for regular professional dialogue that goes much beyond anecdotal exchange and the trading of techniques (Cole, 1997:18). Yet despite gathering evidence about the benefits of reflective practice based professional development, many employers still remain wary of it, often favoring more technical, skills-based, transmission and didactic types of professional development because they are shorter, cheaper, more exact, more easily accommodated with limited time and resources for PD, more obviously linked to outcomes, and they are seen as 'safer' as they do not risk crossing the personal / professional divide.

5.2 REFLECTIVE PRACTICE AND PROFESSIONAL STANDARDS

Many professions have now developed professional standards to explicitly state what qualified people in certain professions should be able to do, know and practice. Apart from articulating specific skills and knowledge related to particular professions, most standards now also explicitly encourage reflective practice and self-knowledge, positioning them as legitimate and desirable components of professional practice. In the landmark document *What Teachers Should Know and Be Able to Do*, the US National Board for Professional Teaching Standards lists Five Core Propositions (NBPTS, 1989:3). One of these core propositions is that 'teachers think systematically about their practice and learn from experience'. Within this proposition, teachers are exhorted to 'critically examine their practice on a regular basis' and the document suggests that 'the images of teaching that we share are deceptive' as they 'emphasize teaching's external aspects, not its inner workings'. Throughout this document teachers are expected to apply 'reflective scrutiny', 'critique' and 'self-reflection' to their practice. The conclusion states that teachers 'must acquire and employ a repertoire of instructional methods and strategies, yet remain critical and reflective about their practice' (NBTS, 1989:21).

A second example from the professions is found in the Australian Principals Associations Professional Development Council's (APAPDC) Propositions about Educational Leadership. The APAPDC has developed 5 propositions about leadership, known as *The L5 Frame* (APAPDC, 2005). Within this frame, the first proposition is that 'Leadership starts from within', and that leaders need to be professionally self-reflective and to know themselves well. The document suggests leaders practicing this type of leadership demonstrate this by saying:

• I take time to critically reflect on myself and my work
• as a result of this reflection, I take action to look after myself
• I articulate my beliefs and values and how they underpin my work
• what people 'bring with them' is valued as crucial to what and how they learn

A third example is provided by the US Accreditation Council for Graduate Medical Education's (ACGME) General Competencies. These competencies call for doctors to analyze their own practice, use effective listening skills and communication and demonstrate respect, compassion and integrity (ACGME, 2003). The ACGME has recently launched a new book, entitled *Journey to Authenticity* featuring stories of chief residents, reflecting on their journeys from being interns. The stories in this book exemplify a critically reflective approach to medical practice, as the residents talk about why they became doctors, what they have learned

about themselves and their profession, and how they have changed and grown along the way. In the preface, David Leach, Executive Director of ACGME names the journey from intern to chief resident as a 'journey to authenticity' which 'actually proceeds from the inside out'. He suggests that 'paying attention to patients' stories enables residents to discover their own stories' and that 'competence is the demonstrated habit of reflective practice' (ACGME, 2007).

5.3 REFLECTIVE PRACTICE AND THE MOVEMENT MODEL

The CCR's approach is greatly informed by Parker J. Palmer's Movement Model of social change, which is described in The Courage to Teach, Chapter 7. This four-stage model suggests that lasting change occurs when individuals choose to live 'divided no more', thereby achieving greater personal wholeness and changed relationships to role and institutions. Beginning with the individual, this chain of integrity has the potential to weave together soul, role, institution, and social transformation. A movement is seen as being most likely to succeed when it attends to both the microcosm and the macrocosm—cultivating individuals and small-scale communities of people who can make a difference in local settings and cultivating large-scale conversations that help people find the language and the legitimation for advocating change. COT retreats provide individuals with the opportunity and support to reclaim their professional hearts, and to be empowered to 'go public' with their desire to reclaim vocational vitality and "heart" in their work and professions (information in this paragraph is paraphrased from the CCR website).

Parker J. Palmer's movement model suggests four overlapping and dynamic stages (1998:166):

Stage 1: Isolated individuals reach a point where the gap between their inner and outer lives becomes so painful that they resolve to live *divided no more*
Stage 2: These individuals discover one another and form *communities of congruence* that offer mutual support and opportunities to develop a shared vision
Stage 3: These communities start *going public*, learning to convert their private concerns into the public issues they are and receiving vital critiques in the process
Stage 4: A system of *alternative rewards* emerges to sustain the movement's vision and to put pressure for change on the standard institutional reward system.

It seems that there is quite a deal of overlap and congruence between Parker J. Palmer's Movement Model and broader emerging trends such as Reflective Practice Professional Development as outlined above. The fact that many people are now seeking to participate in reflective practices, to more fully integrate their inner and outer lives, and to find a renewed sense of vocation is consistent with Stage 1. When these people gain the companionship and support from other like minded people or communities on their journey, it is consistent with Stage 2. The existence of reflective communities that are becoming more visible, either as the result of a critical mass of people or the key leaders in an organization advocating reflective practice, is consistent with Stage 3. The ways in which some professional standards are now recognizing and rewarding self-awareness and reflective practice, is consistent with Stage 4.

6. RESULTS

6.1 THE QUESTIONNAIRE

The data from the questionnaire will be discussed below by identifying overall themes and patterns, and then examining more detailed responses to individual questions.

6.1.1 OVERALL THEMES AND PATTERNS

As is common in ethnographic research, respondents' answers in the questionnaire were analyzed for patterns, themes, commonalities and differences, in order to determine which patterns and sub-patterns should be foregrounded. Whilst organizing responses into themes is helpful to manage data and signpost the way forward, it inevitably aggregates the data and somewhat reduces the impact and complexity of individual stories. After examining the large quantity of data that respondents submitted in the questionnaire, four major themes emerged.

1. Respondents are overwhelmingly positive about their COT retreat experience and appreciated the opportunity to express their gratitude for COT retreats

Respondents were extremely positive about their COT retreat experience, with the vast majority (77%) reporting that COT retreats are *exceeding* their expectations. The high response rate (93%) appeared to reflect both the gratitude of respondents for their COT experience, and their desire to give back to and remain connected with the COT / CCR community. It was evident that participants appreciated the opportunity to convey their gratitude for COT retreats and to express the impact these retreats have had in their lives. They also used the evaluation as an opportunity to thank both the CCR and the facilitators for their COT retreats. Throughout the questionnaire, respondents provided detailed, trusting and soulful responses. They commented how helpful participating in the evaluation had been, as it provided a catalyst for reflection on the ways in which COT learnings had enriched their lives and work. Although each participant had experienced a different combination of COT / CCR retreats, they nevertheless recognized, appreciated, articulated and celebrated what they saw as the distinctive, common core of circles of trust. They described them as safe and trustworthy spaces where people can be alone within a community to experience silence, reflection, listening to their inner teacher, speaking into the circle and clearness committees.

2. Respondents cited many personal and professional applications from their COT learnings

Regardless of their profession, respondents cited extensive examples of the ways in which they have applied their COT learnings in both their personal and professional lives. Whilst there was quite a deal of overlap between their personal and professional learnings, there were also some different applications. On a personal level, respondents cited their learnings as including trusting their inner teacher, listening more fully, asking better questions, ensuring that groups are safe, re-discovering spirituality, inner-healing, changing the metaphors that guide their lives, having a cup of tea with fear, wearing a mobius strip bracelet as a reminder to look for paradoxes each day, and looking at themselves and others with 'soft eyes'. On a professional level, respondents cited their learnings as including engaging in deep listening, asking open, honest questions, better understandings of group dynamics, holding safe spaces for people, practicing integrity, becoming a better teacher, not needing to fix workmates and clients, believing that people have the answers within, having more patience with big questions, using boundary markers, better understandings of group dynamics and using third things such as

poetry in groups. Quite a few respondents reported that they are in the process of, or already have, set up a circle of trust in their own personal and / or professional communities.

3. Respondents desire ongoing connection with the COT / CCR community

Respondents expressed a strong desire to remain connected with the COT / CCR community and to attend more COT / CCR retreats in the future. Most respondents want to maintain ongoing linkages with other participants either from their particular COT cohort, in their geographical location or the broader COT / CCR community. Whilst some respondents state that they already feel supported by the COT / CCR community, others are seeking more tangible ongoing connections. Quite a number of respondents suggested ways in which they would like to remain connected with the COT / CCR community, such as reunions, annual gatherings, teleconferences and a listserv.

4. There are some minor changes that can be made to improve the COT experience

Whilst the questionnaire revealed that respondents are overwhelmingly positive about their COT experience, some mentioned minor ways in which they believe that their experience could be improved. A significant number of respondents requested accommodation in single rather than shared rooms during COT retreats. Other suggestions for improvement included receiving more guidance on the pathway to facilitation and more opportunities to talk during COT retreats about participants' professional applications of COT principles. There were small numbers of people who struggled with some aspect of COT retreats including the artwork, mealtimes, the walk and talk, journaling, the amount of sitting and the length of the retreat (too short). However, for each of these comments, many more respondents praised these same aspects. It is important to note that many respondents said that they couldn't think of anything that could be done to improve their COT experience.

### 6.1.2 RESPONSES TO INDIVIDUAL QUESTIONS

Question 1a: Age

All respondents answered this question. The Evaluation revealed distinctive COT demographics that are consistent with overall COT demographics. As shown in the graph below, 92% (36 of 39) of respondents are aged over 40.

Age of Participants
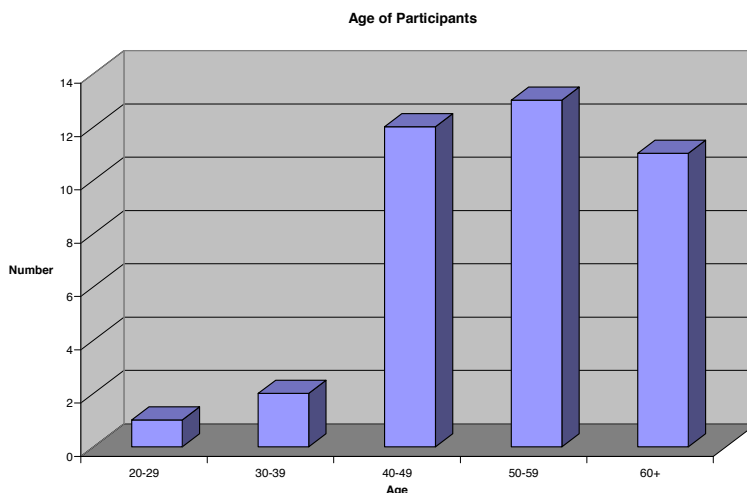
Question 1b: Gender

All respondents answered this question. As shown in the graph below, 87% of respondents are female.

Gender of Participants
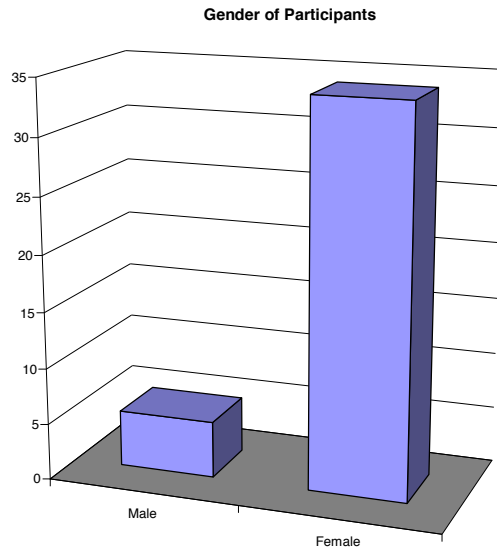
Question 1c: Ethnicity

All respondents answered this question. As shown in the graph below, 94% (37 of 39) of respondents are White or Caucasian, 3% (1 of 39) Black or African American and 3% (1 of 39) identified as Other (Jewish).

Ethnicity of Participants
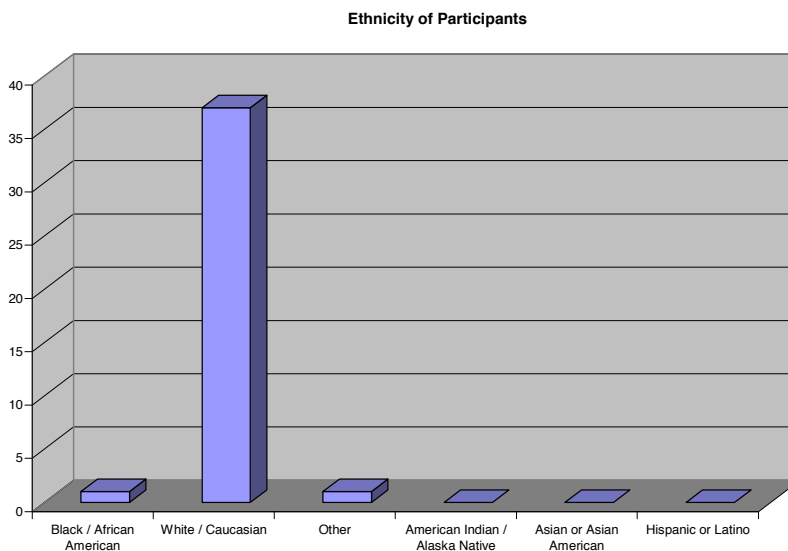
Question 1d: Employment Sector
All respondents answered this question. The cross-professional nature of COT respondents is evident from the graph below. However, 51% of respondents (20 of 39) are employed within Education, with 38% (15 of 39) coming from Higher Education.

Employment of Participants
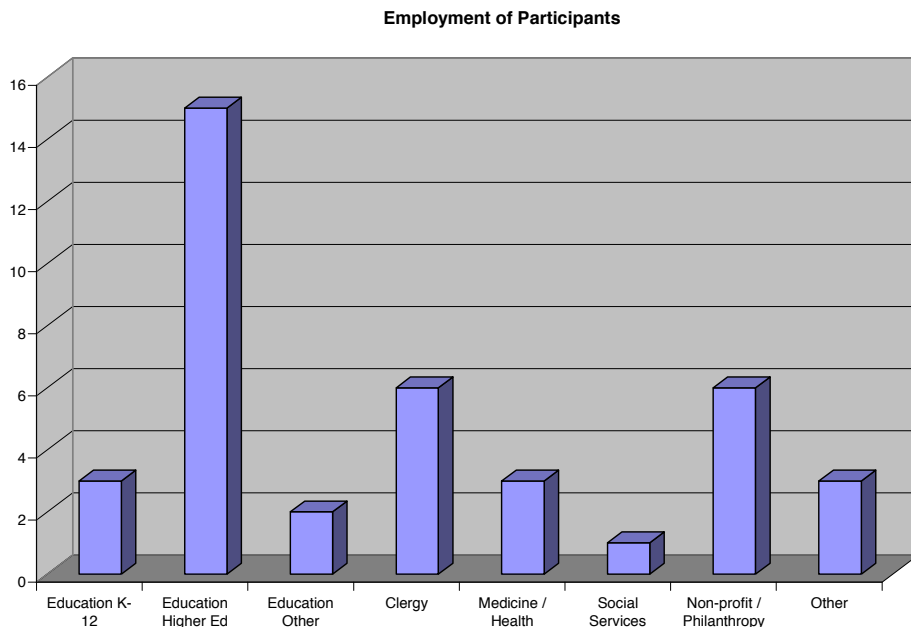
Question 1e: Work or vocation: Please describe your work or vocation and your current job or work role
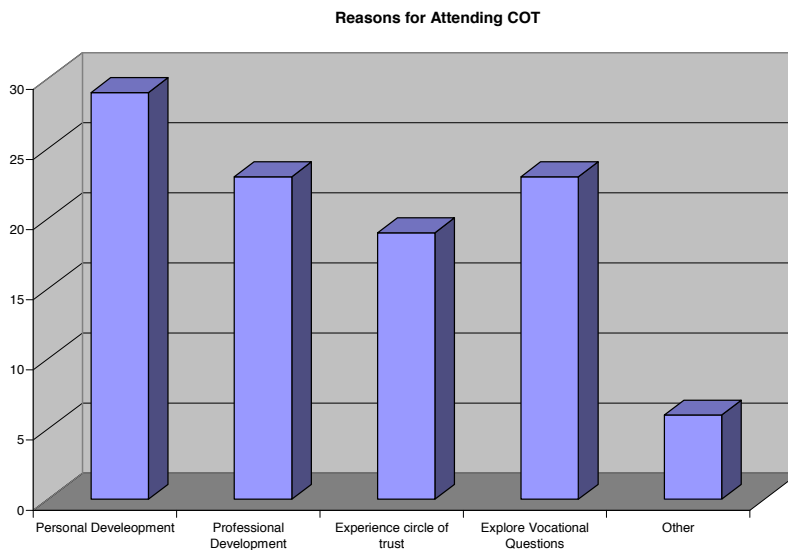All respondents answered this question, providing clarifying information for their answers to the previous question. In addition to the broad categories listed above such as K-12 teaching, higher education and clergy, specific jobs of respondents in other categories include a pediatrician, photo-journalist, director of parent education, coach, bereavement counselor, librarian, full-time graduate student, career counselor, acupuncturist / herbalist, fund development and human resources management.

Question 1f: Number of years of experience in your current job / profession
All respondents answered this question. The length of time respondents had spent in their current job ranged from 2 to 36 years. It wasn't possible to calculate an average time people had spent in jobs, as some people answered broadly for the total years in their profession, whilst others answered specifically about time in their current job within their profession.

Question 2: What were your primary reasons for attending the COT retreat?
All respondents answered this question. Respondents were able to check more than one box for this question. The most popular reason for attending the retreat was for Personal Development. This was closely followed by Professional Development, Exploring Vocational Questions and To Experience a circle of trust, as a result of reading *A Hidden Wholeness*.

Reasons for Attending COT

Question 2a: Please specify your primary reason for attending the COT retreat

15% of respondents (6 of 39) answered this question, providing additional clarifying information and expanding their answers to the previous question. For example, one participant said:

I am introverted, and in my first COT experience I realized the comfort of being myself in a group. At my second retreat, I wanted to work on being more comfortable in the group.

Question 3: Do you have any additional comments about your reasons for attending the COT retreat?

82% of respondents (32 of 39) answered this question. Their answers included finding out more about Parker J. Palmer's writings, achieving personal and professional growth, and interest in becoming a Facilitator. Respondents gave answers such as:

I was very moved by Dr Palmer's writings and really wanted to explore them more deeply

I have been exposed to many counseling and self-improvement approaches and techniques. No other approach understands that we already have the answers that we need

I think this is some of the most important work happening in education right now – it is essential work

I had lost touch with my soul

The quality of my work and life has advanced significantly each time I complete a retreat. It is as if I identify a key piece of who I am

I am/was interested in the facilitation process and wanted to have more experience on retreats with expert facilitators

I benefited far beyond any of my original reasons for attending. What I thought I needed was accurate but my expectations were exceeded as I also hoped for spiritual development and that was the greatest gift

Question 4: What did you hope to get out of attending the COT retreat?
95% of respondents (37 of 39) answered this question. Their answers included experiencing circles of trust described in *A Hidden Wholeness*, learning about facilitation, time for reflection and clarity on vocational questions. Some of their answers were:

I read A Hidden Wholeness. I then needed to experience it

*I hoped to sort out my thoughts, process my inner questions*

I hoped to have a quiet reflective weekend where I could start to remember who I am and why I do what I do. I hoped to meet some good folk and contribute to holding a formational space for all of us to work into

A more reflective practitioner who could begin to be more intentional in incorporating the concepts into my work with teachers back home

I hope to learn more about the process of facilitation as well as create time and space for personal reflection and renewal in a community

Question 5: Did the COT retreat meet your expectations?
All respondents answered this question. Respondents were overwhelmingly positive about their COT experience, with 77% (30 of 39) responding that the COT retreat had ***exceeded*** their expectations, 8% (3 of 39) stating that it had fully met their expectations and 15% (6 of 39) saying it had mostly met their expectations. None said that the retreat had only partly or hadn't met their expectations. The graph below indicates the level of satisfaction with COT retreats:

Meeting Expectations
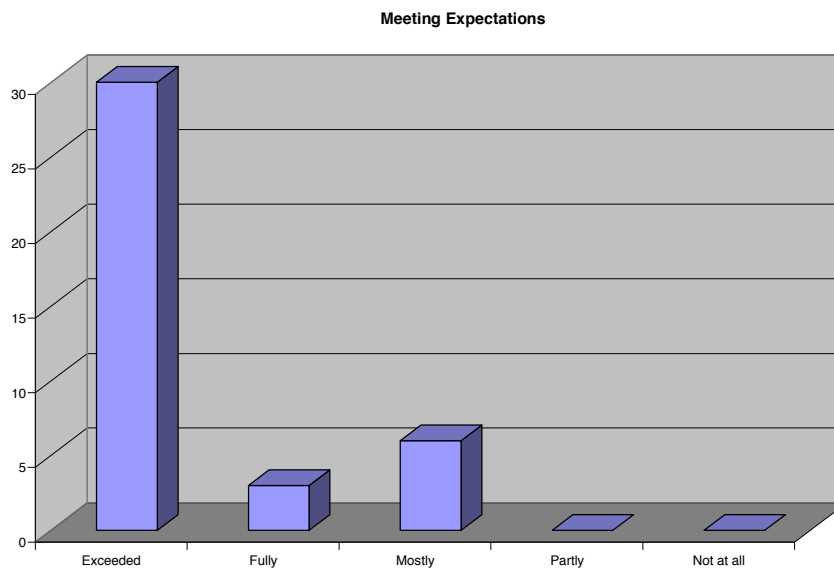
Many of those who answered that the retreat had fully or partly met their expectations took the opportunity in later questions to clarify and qualify the reasons for their responses to this question:

My first experience clearly exceeded or at minimum met fully my expectations. I enjoyed learning more about how to facilitate activities from the intermediate COT and gained a lot that I could immediately use in my work. The reason I replied mostly is because I expected to leave the intermediate retreat having gotten further along on how I plan to use the principles of courage work in my work. I believe I could have gotten further if I had more time to focus on my thoughts as it related to my work and courage work. I wanted more time during the retreat to be in silence, meditation and in dialogue about those ideas. I was looking forward to having the focused quiet time to explore these ideas and the activities we did were not focused on helping me with those thoughts until the end

I would like at least one more day added to the retreat; it ends too quickly for me! That's why I put "mostly" up above. I'd love to have a little more time at the beginning to be quiet, get past all the business and hurriedness that I bring in at the beginning of the retreat, and have a little more time for integration at the end of the retreat. Thanks for asking!

I have attended two retreats. I would say that one MOSTLY met my expectations and one EXCEEDED my expectations. I marked FULLY as a compromise

Question 6: Do you have any additional comments about this?

82% of respondents (32 of 39) answered this question. Respondents used this question as an opportunity to explain the multitude of ways that COT retreats had exceeded expectations. They also praised the qualities and skills of the facilitators and the beautiful settings**.** Some examples include:

Circle of Trust was like water to a dying person. I was given life

I was literally hungry for this type of experience

It was what Parker described in A Hidden Wholeness, which was refreshing in a world which doesn't deliver what is promised

Facilitators were fabulous: human, PRESENT, accessible, able to set a safe space

One of the key elements that made it such a success for me was the competence of the facilitators. I have rarely experienced such excellent role modeling that was so authentic

It was truly a gift, well facilitated - the best I've ever encountered - conducted with integrity, skill, passion, fun/enjoyment, and deep respect and commitment! The hospitality was a true gift, as was the location and the other attendees!

What has been unexpected is the security of a network community of folks I can contact if I need resources, journal article suggestions, professional/personal moments of being 'seen' and acknowledged for the gifts I have and bring to my work. Again that has been critical to the degree of integrity and resiliency I have been able to sustain in my professional life

Question 7: What did you find distinctive about the COT retreat?

All respondents answered this question. Their responses were thoughtful and nuanced and they enjoyed synthesizing their experiences and looking for commonalities between their COT retreats. Their answers focused on the development of a community, the work of the soul, use of third things, intentionality of the space, rhythm of the schedule, safety of the process, space and time for inner reflection and skills of the facilitators. Some of the things they found distinctive include:

People were able to move into becoming a caring, sharing & trustworthy community in such a short amount of time

The ability to expose the soul without feeling exposed

It's the most powerful professional development I've ever experienced

The touchstones of "always invitation, never demand" and "no fixing", and the facilitators' subtle but certain protection of these norms, set the retreat apart from others

I enjoyed the way in which the Facilitators were transparent about their work as co-facilitators. It was a special touch that has allowed me to better understand the core principles. It also allowed me to reflect on my first COT experience and see it with new eyes. Because of their transparency, I can now better understand the care with which a circle is designed, so that everyone in the circle feels safe

The most distinctive part is the intentionality of the space - there are so few spaces in our lives that are held with intention. The safety and integrity that the COT principles and practices are held with is remarkable and yet so simple. By the way the Facilitators are genius - they work together in a way that the sum is so much greater than the parts - and that is saying a lot as each of those "parts" is quite remarkable unto themselves

Question 8: Which aspects of the retreat were most beneficial or meaningful to you?

All respondents answered this question, and there was a great deal of overlap between this question and the previous one. They commented on clearness committees, the use of third things such as poetry, solitude, silence, calm and rest, guided journaling, being together in community, the settings and once again, the facilitators. Some quotes were:

The highlight of a COT retreat is the Clearness Committee. Having experienced it now as both a questioner and as a focus person, I am hard pressed to say which experience was more enlightening

Clearness Committee- coming to appreciate this as a microcosm of a Circle of Retreat; Learning how to BE in a Circle- attentive, listening; how to invite contributions and honor them; How to ask open, honest questions. The VARIETY of approaches. (Third things) The value of silence/time for reflection

Silence. Rest. Journaling. All while being in community

The ability to come to a place and be held with grace. To know there is a way of being in space that brings out the best in people - the ability to go and know I will not be fixed or subject to fixing behavior - remarkable, what a gift

The pacing of the day and the alternation of group/alone time. The journaling, art… The rhythm of the COT provides an experience that most of us lack in our lives

Question 9: Which aspects of the retreat were least beneficial or meaningful to you?

92% of respondents (36 of 39) answered this question. The most common issue raised was the desire of some respondents to have a room of their own. Several other matters were raised by small numbers of respondents. It is important to note that more respondents said that they couldn't identify a single thing that wasn't beneficial or meaningful than the total of those that raised any single issue. Some examples of what people found least beneficial were:

I struggled with sharing a room. My room mates have been wonderful. It is just that I would have like the ability to have private space

Probably the most difficult thing for me was sharing a room with someone else. After the fullness of the days, I really craved time alone

I learned that it is better for me to not have a room mate when I am trying to focus internally

A more deliberate connection, perhaps electronically, for follow-up when the retreat was over

The walk and talk with one other person. This feels too much like what I do daily in my work

I find myself sometimes saying to myself, oh another poem

Too much journaling for me. I don't mind some, but I also seem to process while talking with others

Perhaps the aspects of art, drawing or sketching, weren't as beneficial to me

Each experience was beneficial and carefully crafted to contribute to the whole experience

Question 10: What could have been done to improve your retreat experience?

95% of respondents (37 of 39) answered this question, but there was a great deal of overlap and repetition between this question and the previous one. Respondents spoke again about shared rooms, their desire for ongoing linkages, and to hear more how other respondents have used and adapted COT materials in their lives. Once again, many respondents said that nothing could have been done to improve their experience. Some examples of responses include:

At my first COT, I shared a room with a lovely person, but there is something to be said for "a room of one's own"

More follow-up, contact to keep the momentum, accountability of the folks involved

Probably more concrete info about how to facilitate, although I really appreciated the opportunities to experience good facilitation and to listen to my own inner teacher

Actually, having received the Newsletter today was timely to my answer… Learning about ways folks are explicitly linking their retreat experiences to the everyday work

I would have liked more opportunity to hear from folks who are trying to adapt the retreat format or to use the principles/practices outside of a retreat series--what were the challenges, successes; what are the tradeoffs-- where does one draw the line between integrity of the original design and growing the program to respond to needs

Nothing. At least nothing comes to my mind. I always find the travel details a little challenging but that is because we stay in beautiful places away from airports!

Nothing, except maybe that we never have to go home from it

Question 11: What were some of your personal learnings / experiences from the COT retreat (insights, awareness, discoveries etc.)?

97% of respondents (38 of 39) answered this question. Their answers were detailed and included trusting their inner teacher, learning to listen more fully, asking good questions, making sure that groups are safe, re-discovering spirituality, changes to self-concept, and looking at themselves and others with 'soft eyes'. Some of their quotes were:

Learning about the role of my soul in my life, realizing that my "rope" to the barn is my compassion, without which I cannot follow my vocation. Learning the importance of intentionally creating quiet space for myself to recharge and reconnect with my soul

I just re-read my journal, and can't begin to summarize all that I heard and felt and learned

Experiences from the retreats helped me to see what they have to do with courage and renewal. I have come to really believe in the process as an effective method of renewal

I have been discovering what makes me feel safe in a group

To trust my inner teacher, use wonder. Be patient

Best of all, I now have words and ways of "living divided no more"

My perception of myself has changed

The biggest experience for me was becoming more skilled in asking open questions--and realizing more fully their effectiveness. I also can now be more intentional about leaving quiet spaces

Discovered deep and neglected need for quiet space in the midst of community - learned how to ask good questions and listen more carefully to others and to myself - became more able to see complementarity in opposites and work with paradox - learned ways to attend to brokenness while nurturing wholeness within myself, groups and systems - became aware of dissonance between my vocational identity and professional role

Question 12: Have they informed your personal life, and if so, how? In what ways have you applied your learning?

All respondents answered this question. There was quite a deal of overlap between answers that respondents gave to this question and the previous one. Once again their answers and learnings included asking honest open questions, beginning circles of trust and improving their self-concept. Some of their quotes included:

Very much so and I'm appreciating this survey which has served as a reminder as I have re-read the journals and some materials from COT

Now I find myself wanting to learn more about groups and wanting to make everyone safe in the groups I attend I feel more at peace because I am more "me" than I have ever been in my life

I am experiencing a new world in which I am free to live congruently

I believe through inner work learned at Circle of Trust Retreats I have become a better person for myself

Yes, I have applied techniques from the workshops and I have tried to model the genuine care for human beings that is well cultivated in the leadership team of courage and renewal. The quality of these leaders has been the most important impact on me because I have tried to improve my sense of care and respect for my colleagues because of the way I have been treated throughout my experiences with the leadership team

My self-talk has become much more positive

My experience at Austin has changed my perspective and therefore my life. I wear a mobius strip bracelet every day and look for the paradoxes in life. I re-read the poetry and essays we were given and consider them my personal library of how to live in sync in my life

One example: a couple of weeks after I returned from the retreat, I had to have an unexpected biopsy to confirm /disconfirm a diagnosis of cancer. In the days while I waited for the procedure and for the results, it became clear that I was being invited to "make cancer a cup of tea." Changing the metaphor from battle to hospitality was wonderfully helpful. It wasn't cancer, but that was just a gift on top of a gift

Yes, they have, in many different ways personally. I am so much more comfortable with relating to family and friends in a deeply respectful manner that is fine with letting them choose their own ways of reacting

Question 13: What were some of your professional learnings / experiences from the COT retreat (skills or sensibilities, practices, approaches)?

95% of respondents (37 of 39) answered this question. Their answers about the learnings in their professional lives were quite similar to the changes they noted in their personal lives, and included deep listening, asking open questions, holding space for people, using boundary markers, better understandings of group dynamics and the use of third things in groups:

I think my personal learnings are also my professional learnings

Gained insight into the importance of renewal practices for those who work in various settings in the voluntary sector - experienced a style of facilitation that has challenged me to learn to lead from within and with my feet firmly planted in the earth

Rilke's quote about having patience with the questions is sitting on my desk. The questions are growing more numerous and deep as I continue in this work, but so too is the idea that it's ok to live with those questions-- to enjoy them even, and to enjoy the journey toward the answers

To listen better, to be more kind, to seek first inquiry, to listen to my heart

Coming back from the retreat, I noticed I was being even more careful with both framing and receiving questions

My integrity will guide my leadership rather than my leadership guiding my integrity

I learned how powerful metaphorical language can be, and how poetry and stories may be used in group career counseling to promote self awareness

How not to try and fix people all the time, to listen and ask clarifying questions

Question 14: Have they informed your work or professional life, and if so, how? In what ways have you applied your learning?

15% of respondents (35 of 39) answered this question. There was quite a deal of overlap between answers that respondents gave to this question and the previous one. Once again their learnings included better listening, learning from their inner teacher and using third things:

I think I am more comfortable and relaxed in my work

The learnings have informed my leadership. I walk more lightly in the world

I have learned if I add one thing to my life something else must leave to make space

I have returned to my community with a new approach to being in group meetings

As Board President I open meetings with poetry or reflective questions or inviting stories

When working with people who come to me because of grief in their life, I am much more comfortable using the open questions and not feeling I have to fill up the times where no one says anything

At the shelter, we are trying not to slip into fix-it mode when we are assisting our homeless guests. Instead of telling them what they need to do all the time (get a job, save your money, etc) our staff now tries to ask our guests what they think they need and what they think would be helpful. This has really changed the entire atmosphere on the shelter and has really improved our guest's confidence and self-esteem

More focused, more intentional, more caring for co-workers, friends, family and others more careful to take care of myself, physically, mentally, emotionally

Absolutely - have been working intentionally with the COT principles and practices in my consulting practice; trying to move beyond "fixing, saving, and setting straight" to a new kind of relationship with clients and colleagues, one that honors the identity and integrity of individuals, communities and organizations

My parishioners have told me that I seem more real, more at peace, and more personal. I feel that I have added skills for pastoral counseling through the knowledge of open and honest questions

Question 15: What further assistance or support would be helpful for you to continue or deepen the learnings from the retreat?

90% of respondents (35 of 39) answered this question. Most respondents strongly expressed their desire for more connection with CCR and for further COT experiences:

An ongoing structure for the COT series - a way to connect with these lessons on an annual basis. A structure for resources for application

'Field dispatches', stories from the grassroots of this work within different professional groups as well as stories of personal renewal and subsequent acts of courage (love the books and articles, please keep writing) - local communities of practice

More regular updates of coming events, resources, ways to stay in touch. after the retreat I attended, I have heard very little from you all

Is there an e-space for us to gather? Regional, national, or international reunions? A place to share insights, triumphs, poetry, or other forms of inspiration?

I will be asking (again) - 'where do I belong' in the program generally. I continue to wish to be 'a connector', and a resource both financially but also into the educational systems - but I need some sort of 'formalized role???'

The most difficult part of life outside of the Circle is just that. Living so far away and not having any other folks in my state who have experienced a Circle of Trust. The sense of distance and feeling alone is a challenge

Perhaps regional retreats with people who have been through these COT retreats. I'm not sure how many times a year would be helpful...

I would like to get together annually with these people, catch up, ask questions, check progress, discuss plans. I learned a lot from everyone there

more frequent retreats, more contact with participants between retreats

Question 16: Do you have any other comments?

79% of respondents (31 of 39) answered this question, and most used this question as an opportunity to again express their profound gratitude to CCR for their COT retreat experience:

I am forever grateful to Courage and Renewal

I am grateful beyond words for what you have created that I have found

Very powerful and important work is occurring through the retreats. Thanks for the opportunity to express the profound impact the work is having on my life. Keep them coming and let us expand the network of who can experience the work as we listen for those hungry for this feast

Thanks for this – it is the most important work in the world and you are doing it

I believe the COT retreats were beautifully facilitated, held in wonderful settings and the right balance of alone-time, time with one other person and group time were held really well

The Circle of Trust is a life-changing opportunity to reflect and revive the spirit. Thank you!

Please keep the Circles of Trust and the wonderful warm, sensitive facilitators who are grounded in Palmer's insightful work

Thank you - for your integrity, commitment, creativity, hard work, and unfailing support in our own personal Courage journey! All of you are indeed, the force behind the gift of this work to our struggling world...

I've already said that this work has been a life changer for me. It has. I almost don't remember how I thought "before". I know that I am not alone in this. All thanks to my teachers, Parker Palmer and the Facilitators. To all the people like the Manager of COT retreats who make it happen behind the scenes and all the others I have had the opportunity to interact with. And most appreciation to that Spirit which always does arrive, just sometimes on a slant

Question 17. In order to further our learnings from this evaluation, we would like to conduct a small number of telephone interviews with participants. Are you willing to participate in a follow-up interview?

All respondents answered this question, and 97% (38 of 39) offered to participate in a follow-up interview.

Question 18. It is often helpful for the work, promotion and reporting on the Center for Courage & Renewal to use quotes from previous COT participants. These quotes do not contain names, but might include an attribution such as "Teacher with 16 years experience". If you do not wish any of your quotes about COT to be used in such a way, please indicate below.

5% of respondents (2 of 39) said they did not wish their quotes about COT to be used.

Question 19. Name (optional).

79% of respondents (31 of 39) provided their name, and the remaining 21% (8 of 39) elected to remain anonymous.

6.2 THE INTERVIEWS

6.2.1 INTERVIEWS WITH COT PARTICIPANTS

Semi-structured phone interviews were conducted with seven respondents who volunteered in the questionnaire to be interviewed. The interviewees were selected to represent a diversity of age, gender, ethnicity and profession, and because each of them cited significant applications of COT learnings in the questionnaire. The purpose of conducting follow-up interviews was to glean more detail about specific areas of interest that emerged from the data received in the questionnaire. The interviews were rich and inspiring, as interviewees were eager to describe the myriad ways they have applied COT learnings in their professional and personal lives. Not surprisingly, similar themes emerged in the interviews to those noted in the questionnaire. Interviewees were extremely grateful for their COT experience, and expressed their desire to remain closely connected to the work of CCR, and to experience further COT retreats. The data from interviewees is organized below under the three questions used for the interviews.

Can you please give me specific examples of how you have applied your COT learnings / experience to your personal and / or your professional life?
Interviewees were quite clearly already experienced in inner work, but deeply appreciated the opportunity to attend COT retreats to extend and deepen this work. Each interviewee cited rich and varied personal and professional applications of COT learnings. The ways that interviewees are applying COT learnings in their **personal** lives include:

- Asking open, honest questions. One interviewee commented that this was more easily done in professional life than in personal life, as personal relationships were more difficult to change due to ingrained habits and established ways of acting
- Building in time during each day for intentional silence and reflection
- Placing an emphasis on invitation in their relationships
- Establishing circles of trust in their churches
- Intentionally changing the metaphors that guide their life. For example, one interviewee described how she 'made a cup of tea' with her possible cancer diagnosis
- Ensuring that the groups they are involved in within their personal life are safe
- Choosing to live life in a more human way

The ways that interviewees are applying COT learnings in their **professional** lives include:

- Becoming better teachers. For example, one interviewee commented that he connects more with his students on a personal level and that his students are noticing a difference
- Changing both the practices and content of their teaching. For example, one interviewee described how she is using silence differently with her students
- Having a greater awareness of formation principles
- Ensuring that the groups they are involved in within their professional life are safe
- Establishing circles of trust in their workplaces
- Changing the way they preach and what they preach about. For example, one clergy commented that he had recently preached a sermon entitled 'Life on the Mobius Strip'
- Using third things such as poetry and art in their workplaces
- Introducing the concept of birthright gifts into their workplaces
- Running a Conversation Café in their workplace as an intentional dialogue process
- Set up a reading group at work based on *A Hidden Wholeness*

In your professional field, how do COT retreats compare to other Professional Development that you have participated in?

All interviewees compared COT retreats extremely favorably with all other forms of Professional Development (PD) they had experienced. One interviewee said that the difference between COT retreats and other PD was the "difference of night and day". Several interviewees spoke about their belief that COT principles need to be experienced first and talked and more fully understood later. Most people spoke about the ways in which COT retreats enabled them to more fully integrate their personal and professional lives. Most interviewees felt that the major defining difference between COT retreats and other forms of PD was found in COT understandings about the soul, and the life-long learnings and applications that these understandings gave them. One interviewee commented that whilst "Parker Palmer didn't invent honesty or reflection, his understandings about the soul *are* new – such as the soul being a wild animal that is shy and not wanting to be fixed or saved". One interviewee commented that other PD and conferences she had attended were largely "didactic and deductive", with another saying that it was refreshing to not have "someone opening up the top of my head and filling it with knowledge". She quoted Patrick Kavanagh as saying "we only learn what we already know", and likened this to the experience of learning that takes place on COT retreats. Many interviewees appreciated the opportunity to meet with likeminded people, with one commenting that "it's like putting your hand in the air to find other people who are like you". One interviewee said that he'd never had the opportunity in any other PD to reflect on his learnings in the way that the COT evaluation had provided, and that in particular, he'd "never had a person phone before to ask about learnings and this has been most helpful".

We know it's sometimes challenging to describe what takes place in COT retreats and the impact it has on participants' lives and work. How have you described this work to others, and what language seems to 'communicate' the experience most effectively?

This question resonated strongly with interviewees, as all had recently tried to communicate 'the work' that takes place on COT retreats to colleagues or friends, and all had found this extremely challenging. Whilst they all believed COT retreats had personally provided them with a new and powerful common language about the work of the soul, this wasn't readily translatable to others who hadn't had exposure to COT retreats or to Parker J. Palmer's writings. Interviewees reported that whilst it didn't worry them that the work was difficult to describe if they were participating in COT retreats for Personal Development, it did became an issue when they needed to gain funding or approval to participate in them for Professional Development. One interviewee suggested how helpful it would be for them to have a brochure with testimonials citing examples of how COT retreats had changed people's professional practice. Several interviewees also spoke about the use of the word 'retreat', suggesting that whilst they liked this term and it was an accurate and appropriate word to describe the process, it caused challenges when seeking funding. All interviewees struggled with the mystery of describing what actually takes place on COT retreats. They named key features of COT retreats as speaking into a circle, holding safe spaces, asking good questions, reflection and using third things. Several suggested the locus of the work was based on intentionality; in holding the space for intentionality and awareness. Other definitions included "a way of learning and growing", "connecting soul and role" and "renewal retreats for people in the helping professions". Another interviewee described the work as being "a safe and sacred

space where we wait for our own souls to emerge and we witness that same emerging in others".

6.2.2 INTERVIEWS WITH PERSONNEL INVOLVED IN COT RETREATS

Semi-structured phone or in-person interviews were also conducted with five personnel involved in the development and delivery of COT retreats. The interviewees included the Co-directors of the CCR; the Manager and Registrar for COT retreats; and the facilitators of all COT2 and COT3 retreats to date. The evaluator also had a conversation about circles of trust with Parker J. Palmer. The purpose of the interviews was to gather further detail and clarity on the history of COT retreats, the translation of the concept of circles of trust into retreats, and to determine how retreats are functioning. Similar to the interviews with participants, these were also rewarding and rich. Interviewees' conversations largely consisted of endorsing what is working well, with a small amount of time spent flagging emergent issues that may need attention in the future.

All interviewees were extremely positive about all aspects of the development and current functioning of COT retreats. They spoke enthusiastically about the conceptualization and translation of Parker J. Palmer's notion of circles of trust into the current 3-tiered series of cross-professional COT retreats. They were all cognizant of the profound impact that COT retreats have had on participants' personal and professional lives and provided evidence of feedback received from COT participants expressing their gratitude and the impact of the retreats. Some interviewees spoke of the organic nature of 'courage work', and the wonderful ways in which COT retreats have grown and developed, both pro-actively and re-actively according to participants' needs. Interviewees confirmed the success of the cross-professional nature of COT retreats, with comments such as "the commonality that people share is that they are drawn to the work of courage retreats, not that they belong to a particular profession". Whilst facilitators indicated that they make certain adjustments depending on whether retreats are across professions or within professions, such as which third things to use, they felt it is more important for facilitators to factor in whether a retreat is a one-off or part of a seasonal series. Whilst it was acknowledged that in some ways COT retreats are 'preaching to the choir' because the people who attend are typically already experienced and active in soul and reflective work, it was nevertheless endorsed as a valid and important mission to provide such people with retreats and circles of trust where they can connect soul and role.

The following is a list of questions expressing issues raised by interviewees that may need further discussion in the future within the courage community. Most of the issues are an amalgam of thoughts posed by various people rather than representing a particular individual.

- How do we serve the needs of COT participants who have already done COT 1, 2 and 3? Should we be supporting these people and if so, how? Should we offer more retreats after COT3? What further could be done for alumni such as a national CCR network?
- How do we ensure that the three existing COTs are consistently recorded and transmitted – what are the core principles and givens?
- What is the same / constant in courage work and what is new / different over time?
- What is similar and what is different between different types of retreats, such as COTs and seasonal retreats? What are the ways in which facilitators need to adapt their facilitation?

- Are some people asking to become facilitators out of a need for belonging with the CCR community? Are there other categories of belonging that could be developed to enable people to belong to the CCR community without needing to become facilitators?
- Will the COT retreats eventually exhaust the market? How will we continue to recruit?
- Could COT retreats include more people in the business / corporate world?
- Is it important to more fully name and articulate what 'this work' is?
- Is the amount of holding of past-participants (particularly COT 2 and 3 participants) that current COT facilitators are doing sustainable?
- Is there something happening within COT retreats re participants' desire for ongoing connection that isn't reflected in the current Movement Model?
- Do we need more COT retreats that are needs-specific, e.g. "Courage to Die", "Courage to Parent"?
- Do we need more ongoing Personal Development for facilitators?
- What is the intersection of inner work and context? e.g. our use of seasonal metaphors aren't helpful running retreats in parts of world that don't experience distinct seasons
- How do we become more of an intentional learning community and make new maps of the new territory?

7. FINDINGS

Overall Finding

After analyzing all of the data sources, it is clear that COT retreat programs are extremely well designed and delivered, highly regarded by participants and very relevant to participants' needs. Because participants are so overwhelmingly positive about both the design and the delivery of the program and their experience, the overall tenet of this evaluation report is one of **commendation to the CCR and all personnel involved in the design and delivery of COT retreats**. There are therefore only a limited range of opportunities for suggesting improvements, and recommendations for improvement are relatively minor.

Response Rate

This evaluation had an extremely high participant response rate, with **93%** (40 of 43) of those who were invited to participate in the evaluation responding, resulting in 91% (39 of 43) completing the on-line questionnaire. This extremely high response rate seems to reflect the high regard, deep trust and gratitude of participants for their COT retreat experience, and their desire to give back to and remained connected with the COT / CCR community.

The Expectations and Experience of COT Participants

Participants were overwhelmingly positive about their COT experience, and report that the retreats are not only deeply meeting their needs, but are *exceeding* their expectations. 77% of respondents said that COT retreats had exceeded their expectations, with the remaining 23% answering it fully or mostly met their expectations. None of the respondents answered 'partly' or 'not at all'. It is particularly significant that 77% stated COT exceeded their expectations as all of these participants had attended a COT previously, and therefore knew what to expect.

Participants find COT retreats highly distinctive and appreciate the ways that COT retreats differ from, and more fully meet their needs than, other professional development opportunities. In particular, interviewees suggested that COT retreats provided lifelong learnings such as listening, questioning and group skills, reflectivity and intentionality.

Participants have extensively applied their learnings from COT retreats in diverse and myriad ways in both their personal and professional lives. All respondents cited rich examples of professional and / or personal applications of their COT learnings. Because of the cross-professional nature of COTs, it is important to note that the professional applications were extensive regardless of the participants' professions.

Development and Delivery of COT Retreats

Whilst conducting the evaluation, I had the opportunity to observe the workings of the CCR office, conduct interviews with CCR personnel involved in the design and delivery of retreats, and to personally attend COT retreats. While the evaluation did not explicitly seek feedback on the functioning of personnel involved in the design and delivery of COT retreats, the combination of unsolicited feedback in the questionnaire and interviews, and my own observations has produced the following finding.

All personnel involved in the development and delivery of COT retreats are working cohesively and effectively to develop and deliver high quality and well-respected programs. The quality and effectiveness of COT retreats is a result of the work of the following people:

- Parker J. Palmer, for his initial conceptualization and articulation of conditions that create circles of trust
- The CCR Co-Directors, for their visionary translation of the concept into COT retreats
- The COT Manager / Registrar, for her wise management of retreats
- The COT 2 / 3 facilitators, for their skilful facilitation of retreats

Respondents are extremely positive about the facilitation of COT retreats, and praised the qualities and skills of all their COT 1, 2 and 3 facilitators. In any program of this nature the quality of facilitation is critical to the success of the program. Respondents praised their facilitators for their wisdom, competence, presence and capacity to hold a safe, open and inviting space. Quite significantly, the feedback given about facilitators perfectly mirrors and affirms the qualities that CCR states that it is looking for in its facilitators.

Whilst the evaluation did not explicitly seek feedback on COT venues and facilities, some respondents in the questionnaire made comments about these. Most respondents made positive and complimentary comments about the venues. A significant number of respondents in the questionnaire requested the option of single rooms for future COT retreats.

A number of participants stated that they had specifically attended a COT to experience a circle of trust after reading *A Hidden Wholeness*. These participants appreciated the opportunity to experience a COT, with some reporting that they have established or are establishing circles of trust in their communities. They reported varying degrees of success in this venture. From comments made by participants, it is possible that there may some uncertainty as to what COT participants are able to do in terms of establishing, naming and facilitating circles compared to people who have completed CCR facilitator preparation.

COT demographics are quite distinctive: 92% of participants are aged 40 and over, 87% are female, 94% are white / Caucasian and 51% employed in education. Whilst the gender and employment demographics of participants in this evaluation are fairly consistent with overall COT retreat demographics, it isn't possible to compare the age or ethnicity of participants with overall COT demographics, because these have not previously been recorded.

Interviewees reported challenges in finding appropriate language to describe and name the 'work' that takes place in COT retreats. Several interviewees also commented on difficulties associated with the use of the word 'retreat' to describe a type of professional development, as the word 'retreat' has particular connotations and may not be regarded by some as legitimate professional development. Whilst interviewees were personally comfortable with the use of the word 'retreat' and were not troubled by their own struggle to name the work, some cited challenges when seeking funding to attend retreats or trying to describe the work to others, particularly professional colleagues.

While the teaching / learning style of COT retreats seems to be aligned with the expectations of most respondents, a number of people noted that some elements did not match their learning styles and preferences. Perhaps there needs to be more sensitivity about the fact that not all

participants are comfortable with a format based on a great deal of sitting, listening, journaling and poetry. Whilst COT retreats appear to cater particularly well to certain learning styles and personality types that are comfortable with auditory learning and stillness, others may find it more challenging to learn in this way. There may be merit in being trying to expand the work to more fully cater to a diversity of learning styles. Strategies to address this could include greater sensitivity to the diversity of participant learning styles / preferences, more explicit signposting and transparency about processes, and the provision of more varied and alternative activities for participants to use.

COT Community / Alumni

Participants expressed a strong desire to remain connected with the COT / CCR community and to attend future COT / CCR retreats. Whilst the COT literature refers to COTs as aiming to provide 'a temporary community', most respondents want to maintain ongoing linkages with either their particular COT cohort, participants of COTs in their geographical location and / or with the broader COT / CCR community. Whilst some respondents state that they are already supported by COT / CCR community members, others are seeking more tangible ongoing connection. Many participants seem to be holding questions about whether to apply to become a COT facilitator, and are seeking information, support and discernment about this process.

Ongoing COT Evaluation

This evaluation has already resulted in, and has the potential to produce many more, positive and generative outcomes for both respondents and the CCR. Respondents commented in both the questionnaire and interviews how the evaluation had provided a helpful catalyst for them to review, reflect on and continue their COT2 and / or COT3 learnings. They also expressed their appreciation for the opportunity to be more closely connected with the work of the CCR. Because CCR so clearly models reflective practice, it is anticipated that the CCR will benefit greatly from the opportunity for reflection that this evaluation has provided, and that this will lead to increased understandings and learnings and identify further opportunities to improve the program. It is also envisaged that the CCR will be strengthened by receiving such overwhelmingly strong affirmation about the quality and relevance of their COT retreat programs. It is anticipated that the findings of the evaluation will assist the CCR to more fully promote its work by demonstrating the tangible benefits that COT participants have identified by the application of COT learnings in their personal and professional lives.

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9. QUESTIONNAIRE

Center for
Courage & Renewal

WELCOME TO THE CIRCLE OF TRUST EVALUATION

CONFIDENTIALITY

This is a confidential questionnaire. You will have a choice at the end of the questionnaire whether you give your name or remain anonymous. If you do not wish your comments to be reported or published, there is an opportunity at the end of the questionnaire to indicate this.

NAVIGATION

Each page of the questionnaire has a 'Next' and 'Back' button. Please note that using the 'Back' button will delete the answers on that page and you will need to re-enter your responses. If you use the 'Back' button for a number of questions, the responses for all of those questions will be deleted and will need to be re-entered.

Some questions require an answer before you can proceed to the next question. If you miss an answer, or answer more than once (where only one answer is requested), you will be alerted to this error before proceeding to the next question.

If you are unable to finish the questionnaire in one sitting, close the window (your previous responses will not be able to be recovered). You will then need to recommence a new questionnaire later by using the link provided.

When you finish the questionnaire, press the 'Close Window' button in the final window. This will save the data. Once you have finished the questionnaire you cannot re-enter the questionnaire.

PART A: BACKGROUND INFORMATION

1. Background Information

1a. Age *(check one box)*

☐ 20-29
☐ 30-39
☐ 40-49
☐ 50-59
☐ 60+

1b: Gender *(check one box)*

☐ Male

☐ Female

1c: Ethnicity *(check one box)*

☐ American Indian or Alaska Native

☐ Asian or Asian American

☐ Black or African American

☐ Hispanic or Latino

☐ White or Caucasian

☐ Other (please specify on the next page)

1c1: Please specify your ethnicity

[   ]

1d: Employment Sector *(check one box)*

☐ Education - K-12

☐ Education - Higher Education

☐ Education - Other (please specify)

☐ Clergy

☐ Medicine / Healthcare

☐ Social Services

☐ Non-profit or philanthropy

☐ Other (please specify)

1d1: Please specify the area of education that you work in

[   ]

1d2: Please specify the employment sector that you work in

[   ]

1e: Work or vocation

Please describe your work or vocation and your current job or work role

1f: Number of years of experience in your current job / profession

PART B: YOUR EXPECTATIONS OF THE RETREAT

2. What were your primary reasons for attending the COT retreat? *(Check one or more boxes)*

☐   Personal Development

☐   Professional Development

☐   To experience a Circle of Trust retreat, after reading 'A Hidden Wholeness'

☐   To explore my vocational questions

☐   Other (please specify on the next page)

2a: Please specify your primary reason for attending the COT retreat

3. Do you have any additional comments about your reasons for attending the COT retreat?

4. What did you hope to get out of attending the COT retreat?

5. Did the COT retreat meet your expectations? *(Check one box)*

☐   Exceeded

☐   Fully

☐   Mostly

☐   Partly

☐   Not at all

6. Do you have any additional comments about this?

PART C: YOUR EXPERIENCE OF THE RETREAT

7. What did you find distinctive about the COT retreat?

8. Which aspects of the retreat were **most** beneficial or meaningful to you?

9. Which aspects of the retreat were **least** beneficial or meaningful to you?

10. What could have been done to improve your retreat experience?

PART D: LEARNINGS FROM THE RETREAT

11. What were some of your **personal** learnings / experiences from the COT retreat (insights, awareness, discoveries etc.)?

12. Have they informed your personal life, and if so, how? In what ways have you applied your learning?

13. What were some of your **professional** learnings / experiences from the COT retreat (skills or sensibilities, practices, approaches)?

14. Have they informed your work or professional life, and if so, how? In what ways have you applied your learning?

PART E: FOLLOW-UP

15. What further assistance or support would be helpful for you to continue or deepen the learnings from the retreat?

16. Do you have any other comments?

17. In order to further our learnings from this evaluation, we would like to conduct a small number of telephone interviews with participants. Are you willing to participate in a follow-up interview?

☐ No

☐ Yes

If your answer is yes, please either send a separate email making this offer, thereby ensuring the anonymity of the information in this questionnaire, or you can provide your contact details below.

E-mail your offer to Robin Gaphni at the Center (robin@couragerenewal.org) or provide your e-mail address below.

| |
| |

18. It is often helpful for the work, promotion and reporting on the Center for Courage & Renewal to use quotes from previous COT participants. These quotes do not contain names, but might include an attribution such as "Teacher with 16 years of experience". If you do not wish any of your quotes about COT to be used in such a way, please indicate below:

☐ No, I do not wish any of my quotes about COT to be used

19. Name (*optional*):

| |
| |

CENTER FOR
Courage
& Renewal

THANK YOU FOR YOUR INTEREST AND PARTICIPATION

Your responses will assist the Center to strengthen the retreat program.
Press the 'Close Window' button below to save your data and close the questionnaire.