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We Take From It What We Need: A Portraiture Approach To Understanding A Social Movement Through The Power Of Story And Storytelling Leadership

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WE TAKE FROM IT WHAT WE NEED:

A PORTRAITURE APPROACH TO UNDERSTANDING A SOCIAL MOVEMENT

THROUGH THE POWER OF STORY AND STORYTELLING LEADERSHIP

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ABSTRACT

WE TAKE FROM IT WHAT WE NEED: A PORTRAITURE APPROACH TO UNDERSTANDING A SOCIAL MOVEMENT THROUGH THE POWER OF STORY AND STORYTELLING LEADERSHIP

This study examined a social movement through the power of story and storytelling and its influence on behavior from a purposeful sampling of individuals who heard the story of Joan Southgate's journey. Ms. Southgate, a 73-year-old African-American, walked the 519 miles of the underground-railroad across Ohio, Pennsylvania, New York and into Canada.

In one sense, this grand narrative of the underground-railroad is a never-ending story but one that is subject to change with each re-telling and/or unveiling of polyphonic microstories. Stories, as no other spoken communication tool, have the ability to capture emotion and reason, hearts and minds. While storytelling is thought to be a most powerful means of communicating, very little scholarly work has been written about its use as a tool for leadership and leaders. The purpose of this study was to look at what meaning could be derived from understanding the connection between storytelling and leadership.

Stories were collected and interpreted for their meaning using a social science portraiture approach, which emphasizes and respects the voice of the people being studied. Their narratives evolved into written portraits that reflected and validated their experience and were placed in a social and cultural context. The foreshadowed question asked: What is the impact of story on the listeners and why do they react the way they do? From a knowledge application perspective, the researcher hoped to uncover how

business/community leaders could better connect with those they'd like to influence in some way and how storytelling could be used for a social movement.

Where leadership is concerned with meaning-making processes, the findings from this study on story suggest that the most important process may be that of developing a sense of self and/or unique purpose and then being able to see one's self as part of the larger whole. It was further revealed that finding one's voice and enabling others to do the same is of primary importance to storytelling leadership, a concept which takes the power of storytelling combined with voice, knowledge, intelligence, and experience of the storytelling leader to unite a group of people who try together to achieve certain shared universal goals.

DEDICATION

This dissertation is dedicated to my husband, John Wesley Gilliam, my children, Carlo L. Gilliam, Bianca M. Gilliam Cunningham and Danielle N. Gilliam, my step-father, Payton Claude Wilson, and my uncle, William E. Williams, Jr.

John “Wes”, you have always taken pride in my accomplishments and your love and unconditional support have allowed me to reach this dream. Carlo, Bianca and Danielle, your love, encouragement, and humor have given me moral support and strength throughout this journey. Claude, thank-you for being a constant source of inspiration and drive along life’s joyous, sometimes painful, journey. Uncle Bill, you are the reason that my soul smiles and can always look back with wonder, knowing that yours is a legacy of love. I thank God for all of you.

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Dr. Carolyn Kenny, the first time that I heard your soft knowing voice I felt a kindred spirit in all that is precious and dear to me. Your support gave me the courage to embrace portraiture methodology. Thank you for helping me to articulate my voice through the stories of others. You will always be an inspiration to me.

Mrs. Joan Southgate, this journey would not have been possible without your story. To you, I dedicate this quote from Albert Schweitzer: “In everyone’s life, at some time, our inner fire goes out. It is then burst into flame by an encounter with another human being. We should all be thankful for those people who rekindle the inner spirit.”

To my conversation partners, Phil and Cindy, Bob and Karen, Howard, and Earl, thank you for trusting me to honor and respect your voices.

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A heartfelt thank you is extended to the following people who provided both professional and personal support. To Cohort 1, thank you for becoming part of my extended family. Through tears and joy, we are connected in a wonderfully enriching and powerful way. To my sister, Michelle “Mikki” Marshall, thank you for allowing me to borrow some of your strength when mine was wavering. Our father would be proud. To Verlene “Kay” Gary and to Wendolyn “Wendy” Grant, your friendship and emotional support were constant reminders of the goodness in the world and inspired me to persevere.

Karah Lauren Henderson, my two-year old granddaughter, everyday you remind me how much love, delight and fun there is in this world. My favorite title will always be Mama and I will love you forever. It is for you and your cousins (all my grandchildren), Koran, Reina, Jason, Carlo Jr. and Eiland, that I will continue to work to inspire others to find and articulate their voices. To all of you, remember the stories so you can pass them on. It’s important for people to know where they came from and what they’ve been through. Now this story belongs to you.

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> We dream in narrative, daydream in narrative, remember, anticipate, hope, despair, believe, doubt, plan, revise, criticize, construct, gossip, learn, hate and love by narrative.
>
> Hardy, *Towards a poetics of fiction: An approach through narrative*

Introduction

I can't imagine a single day without story, whether that story is a poem, the narrative surrounding the birth of my first grand-daughter, the newspaper and anecdotal stories (true and untrue) during my first political run for office, the pleasant and sometimes painful memories that emerge from watching a movie or reading a book, the saga behind a tragic accident or the account of walking the path of the underground-railroad. I need stories to know I'm not alone. That is reason enough. Stories tell who we are, what we do, where we come from, how we live and occasionally they tell me why we live as we do. I know that as individuals we all relate to stories. We are surrounded by stories and our lives are stories. They, as no other spoken communication tool, have the ability to capture emotion and reason, hearts and minds.

This part of the proposal provides a detailed explanation of the research I will undertake. In its simplest terms, it is a story about stories. This section includes the statements of the problem and purpose of the study as well as the significance of the problem. It continues with a description of the context for the selected exemplar story, which revolves around the re-telling of a dominant story (grand narrative) of the underground-railroad as traveled, on foot, by Joan Southgate through Ohio and into Canada. Because "people are always in the middle of living and tracing their storied

lives," the grand narrative, as it interplays with other stories, is not fixed (Boje, 2001, p .5). In *Narrative Methods for Organizational & Communication Research*, Boje offers a post-modern methodology to stretch the traditional approach to narrative method in dealing with fragmented, non-linear and collectively produced stories. My goal in capturing the re-telling and/or unveiling of these microstories is to respect Boje's ambition: "to shatter grand narrative into many small stories and to problematize any linear mono-voiced grand narrative of the past by replacing it with an open polysemous (many-meanings) and multivocal (many-voiced) web of little stories."

Meeting Joan Southgate

Joan Southgate has shattered the grand narrative of slavery and opened the window of possibilities by re-examining the past and interpreting it anew. I believe that everything happens for a reason and though the greater purpose was not clear as I drove to my friend's house to meet Joan Southgate, I recognized a power within her storytelling that was sudden, immediate, and deeply felt. Atkinson (1995) notes: "We want to be able to tell others and hear from others what it is that has made us who we are at our essence" (p. 47). Ms. Southgate's story helped me to connect with my roots, to better understand where I came from, and to appreciate being called an African-American. For those reasons, my experience in first meeting her was extraordinary.

Phil Saunders, a friend and neighbor, called with an invitation to his home to meet this remarkable woman. He and fellow RVers were meeting to plan their journey with Ms. Southgate on the last leg of her trip. What an honor, what a privilege to be able to meet her, not in a public community forum but in the privacy and comfort of someone's home. I couldn't wait to see her. I wanted to know why. Why at this time in her life did she decide to make this journey? Why make the journey at all? What did she hope to achieve?

When I arrived, Phil immediately took me downstairs where everyone was munching on various goodies prepared by Cindy, Phil's wife, who is always a gracious hostess. After introductions were made, I fixed a plate and returned to take a seat close to Ms. Southgate. My first reaction to her was a visual one. I noticed her hair because she wears a style, cut very short and close to the scalp, similar to my own. It's quite startling how we imagine someone might look based on limited prior knowledge and assumptions. Her story of traveling the path of the underground-railroad had become so large that I imagined her to be of the same stature, but when she stood for our informal introduction, I saw that she was short, petite and unassuming in her demeanor. What she lacked in height was more than compensated for in her presence, strength of character and unwavering belief in what she was doing.

As we started off in polite conversation, another connection was made. I learned that her daughter had attended Antioch College in Yellow Springs and that she, Ms. Southgate, had stopped in Yellow Springs as part of her 519-mile walk. I found great comfort in the sound of her voice. "The provider provides what the seeker seeks, and the seeker seeks what the provider provides" (Atkinson, 1995, p. 36). It was as if she had

reached into my inner being, discovered the lingering questions that stemmed from my own disconnection with family and ancestral history and fed my soul. We talked about these brave African-Americans who risked so much for freedom and her mission to heal the wounds of slavery. As I listened, I felt a connection to my past that I'd never experienced before. I had always tended to resist being labeled African-American, preferring instead to be called Black. In 1968 I was sixteen years old when James Brown released the anthem, *Say It Loud (I'm Black and I'm Proud*). Where only the refrain held meaning for me in my teen-age years, I now understand the significance of the lyrics.

> Lyrics Excerpt:
> Some people say we got alot of malice
> Some say it's a lotta nerve
> But I say we won't quit movin' until we get what we deserve
> We've been buked and we've been scourned
> We've been treated bad, talked about
> As sure as you're born
> But just as sure as it take two eyes to make a pair - huh!
> Brother we can't quit until we get our share
>
> Say it loud - I'm Black and I'm proud
> Say it loud - I'm Black and I'm proud
> One more time, say it loud - I'm Black and I'm proud - huh!
>
> I've worked on jobs with my feet and my hands
> But all the work I did was for the other man
> And now we demand a chance to do things for ourself
> We're tired of beatin' our head against the wall
> An workin' for someone else
>
> We're people, we're just like the birds and the bees
> We'd rather die on our feet
> Than be livin' on our knees
> Say it loud, I'm Black and I'm proud (Retrieved December 26, 2006 from http://hotburrito.100megsfree5.com/music/songs/1960/brownproud.html).

As an adolescent, it felt good to sing the refrain. I could smile from the inside out as the words touched my heart and tugged at my emotions reaffirming that I was special, unique and valuable. The impact of the song was hard hitting and far reaching. As an adult, as a Black American, I understand the deeper meaning of his words. Where James Brown made Black people think seriously about their common plights and called upon them to begin to define their own goals, Ms. Southgate's storytelling reminds me that rather than discounting or ignoring my heritage, I need to recognize and reclaim its richness and goodness. I need to know from whence I came, find and reestablish my voice in articulating a self-claimed Black identity, and then support others in finding voice, gaining control of their existences and becoming all they were meant to be. I wasn't born in Africa and on the maternal side of my family, I could only trace back 100 years or so to the Carolina states. I didn't know it then but that meeting with Joan Southgate was a moment of personal truth. I may not have been born in Africa but I am a descendant of a great people from Africa *and* [emphasis mine] I'm Black and I'm proud.

I can't recall when we ended our conversation but I do remember thinking that I needed to be respectful of the intended purpose for this gathering, which was to plan the trip. As I left, I thanked Ms. Southgate for the talk and wished her God's blessings for a safe journey. What was not expressed was my disappointment in knowing that my work schedule would not allow time for me to make the trip with her. Joan Southgate's story prompted the unveiling of an inner truth and inspired me to delve into Carl Gustav Jung's assertion: The meaning of my existence is that life has addressed a question to me.

Situating the Researcher within the Exemplar Story

My personal story is embroidered with the various roles (female, African-American, Black, wife, mother, grand-mother, sister, council woman, and a list of other groups where I claim membership) I play in public life. What's disconcerting about these roles is whether they are congruent with my personal and professional integrity. Am I exercising a strength that comes from a sense of duty and responsibility to one's unique self? Or, as Parker Palmer, author of *A Hidden Wholeness* (2004), describes: Am I living a divided life? From the few examples of the divided life cited by Palmer, I recognized myself in four.

- We make our living at jobs that violate our basic values, even when survival does not absolutely demand it.
- We remain in settings or relationships that steadily kill off our spirits.
- We hide our beliefs from those who disagree with us to avoid conflict, challenge, and change.
- We conceal our true identities for fear of being criticized, shunned, or attacked. (Palmer, 2004,p. 6)

As a human resources and organization development practitioner, my calling has been to use my talents to help others identify and use their talents. Too often than not, I've questioned whether I'm using my talents to make a difference in what a colleague describes as trying to change the world that Dilbert lives in. In a world where people are volunteering less, voting less and, then not until we're met with the devastations of the Sumatra Tsunami and Hurricane Katrina, caring less, I sought an elected political office. Though uncomfortable with self-promotion, an oxymoron in modern-day political life, I took public action to serve my community. I concur with Grace (1999) that "politics rightly understood is a lost art" (p. 31) and that we need "new civic space…gracious space…where strangers feel welcome, where divergent points of view are considered

enriching, and where listening, curiosity, and inquiry are celebrated more than opinions and dogma" (pp. 32-33). But in taking my inner truth to the outer world to reclaim my personal wholeness and help one person, one neighborhood, one community at a time to reclaim some of its own, am I at risk for losing my sense of self in the cause?

After 70 years of living, Joan Southgate has not slowed down. She picked up the pace, literally, in her walking the path of the Underground Railroad. She embodies the notion that we cannot hold a torch to light another's path without brightening our own. There's hope in her message for me. I am inspired by this woman, to think deeper, to be true to myself or otherwise miss what being human is for me and to pursue the question that is mine alone to answer.

We know that through hearing stories we learn from experiences we have not personally lived. The exemplar that served as a catalyst for the development of my foreshadowed question is one such story. It is a story told by Joan Southgate, a 74 year old African-American grandmother and retired social worker, who walked the 519 miles of the underground-railroad across Ohio, Pennsylvania, New York and into Canada.

The original or first-telling of the story is about the journey of those freedom seekers and railroad conductors (those who helped and provided safe houses along the way to freedom). This exemplar is a subsequent re-telling of the story of the underground- railroad, as traveled by Ms. Southgate on foot, starting in Ripley, Ohio and ending May 2003 in St. Catharines, Canada. I, along with other listeners, first heard her story in February 2004 during a community gathering in celebration of Black History Month.

Because the rhetoric of the researcher as storyteller is relevant to any interpretive work, it is critically important to situate myself as researcher within this exemplar story (Bennett, 1998). The more I am able to explicitly identify dilemmas, biases or other dimensions of my life that offer a potential influence on my perspective as a researcher, the more effective my research design will be.

My initial contextual focus for studying story and storytelling leadership was on formal leadership development programs in corporate or university settings. I was interested in how leaders either used or could use stories to advocate change and build a sense of community in their own organizations. While still in this exploratory phase of narrowing the research question, I became interested in antenarrative, a non-traditional multi-voiced methodology aimed at analyzing fragmented stories constituted out of the flow of lived experience. Though Boje's (2001) antenarrative methodology was meant for the study of storytelling in organizations, upon reflection and after hearing Joan Southgate's story, I expanded on the notion of organization to include that of a local community. Of the eight antenarrative analysis options Boje proposes, I chose three (grand narrative, microstoria and story network) with which to examine Joan Southgate's story (as cited Gilliam, 2004a) which she shares in community after community.

Boje (2001) describes these approaches, which are not mutually exclusive, as follows:

> Grand narrative is to analyse, resituate and restory grand (dominant) narratives, then to let a thousand stories bloom rather than dismiss certain stories as unworthy (p. 44). The ambition is to shatter grand narrative into many small voices (p. 10).

> Microstoria analysis, also called microhistory, is an open history approach, skeptical of grand narratives of macrohistory (p. 45). It's a preference for little people's histories and resistance to the macro narrative or great man accounts that are so fashionable in organization studies (p. 10).
>
> Story network analysis traces the storytelling behavior in the organizing situation (p. 10). It is about the living relations and focuses on the embedded process of story networking (p. 62). In this theory of story assemblages and dynamic networking, there never is a whole story or an originary story since even eye witnesses disagree, as do historians (p. 65).

Because of my fascination with Ms. Southgate and her story, I returned to a lingering question: Is it the story, the storyteller or both that prompts a reaction? Ms. Southgate, the storyteller, personifies the best of what voluntary sector leaders are and do. Taken from a report on a joint project of The Coalition of National Voluntary Organizations and The Association of Canadian Community Colleges, a voluntary sector leader is:

- An agent for social change. Someone who is connected and informed. Someone who knows how to make connections and get partners working together. Someone who is creative. Someone with a vision who has a mission and works for change in a careful, ethical way (Retrieved March 17, 2005 from http://www.vsi-isbc.ca/eng/hr/pdf/nli_report.pdf).

The pilot study for this research demonstrated that Ms. Southgate did all these things in planning for and executing her 519-mile walk. At the conclusion of this walk, she

founded a grassroots organization, Restore Cleveland Hope, to preserve the Cozad-Bates House in Cleveland, Ohio. The Cozad and Ford families, original settlers of the Greater Cleveland area, assisted many fugitives who found their way north to "Hope," the secret code name for Cleveland. Ms. Southgate works to improve life in the community and inspires others to act. She is courageous, determined, passionate, respectful of diversity and most of all, hopeful.

During the last residency for the doctoral program, I shared Joan Southgate's story. Until that time, I had not decided on the specific area for my study. I can't recall how I came to talk about her story but something about my entire being comes alive when I tell and re-tell the story. Something also happens (and did happen during the residency) for and with the listeners. Thus, having narrowed my research question to what is the impact of story on the listeners and why do they react the way they do, I confirmed what I knew intuitively – that Joan Southgate's story is the exemplar from which I could conduct my research.

I was impressed with this bold woman who dared to walk this journey. But I found her story compelling for other reasons. Bank's (2000) hermeneutic study, on the narrative of slavery and its influence on the lives of 12 conversation partners, aptly describes my own thinking about slavery and how that thinking relates to Ms. Southgate's story.

> As a result of the loss of our own stories we have only one pervasive, powerful narrative that encompasses us. We, the descendents of the African slaves, have only the narrative of slavery that unites us and binds us and includes us as a cohesive group. Certainly, we have individual and family narratives that we are

> included in, but only the narrative of slavery addresses us as a cultural unity…This narrative, as it is typically understood could easily be interpreted as a story of weakness and inability on the part of the African (Banks, 2000, p. 4).

This typical interpretation is the grand narrative of slavery. It is not the story that Joan Southgate embraces. Her story is one of strength, courage, compassion, hope, pride and power of a people, in particular that of African-Americans. Polkinghorne (1988) points out that:

> At the individual level, people have a narrative of their own lives which enables them to construe what they are and where they are headed. At the cultural level, narratives serve to give cohesion to shared beliefs and to transmit values (p. 14).

I have a particular connection to this story because my personal life story is incomplete. On the paternal side of my family, I can trace back to my great-great grandparents who were slaves. Through story, this heritage has been passed from generation to generation but with no detail. On the maternal side, the history of our family begins with my grandmother who reportedly was an only child. She rarely spoke about her mother and never uttered a word about her father. So I am drawn to Ms. Southgate's story as a missing piece of my own.

As James McGregor Burns stated: Both leaders and followers may be transformed to the point where followers becomes leaders and leaders followers. Ms. Southgate's telling of her story exemplifies that statement. Her journey began as one where she wanted to walk in their path, to follow the journey of and to praise the freedom seekers

and others who helped along the way. She emerged as a leader that others wanted to follow and as others embraced Ms. Southgate's cause they, themselves, took on leadership roles. Her story further demonstrates what Banks suggested from his own study:

> It is of utmost importance that the narrative of slavery be presented to children by elders in the community who share their history and therefore tell the tale with respect and deep appreciation for this interpretation of its meaning. It is not the job of textbook companies, television or radio that originates outside our community to tell the story for us. Indeed, they cannot and we rely on them to do it for us at our own peril. It is our responsibility to teach our children who they are (pp. 93-94).

Ms. Southgate has not hesitated in taking on this responsibility. She seeks to uncover the goodness in humanity. She insists that we not forget who we are and where we come from.

By "insists," I do not infer a doggedness to comply with a directive. On the contrary, Ms. Southgate's quiet resolve invites the audience to listen and to take from the story what is needed. I witnessed the occasion where her February 2004 storytelling session held a healing element for one listener whose parents are of different racial and ethnic background. Some days after hearing the story, a young man of sixteen years described a feeling of being made more whole, of being connected to his mother's family and to his past. I can surmise from his comments that the story connected him to his present self and I suspect that the connection will extend into his future being. Polkinghorne (1988) recognized the therapeutic value of narrative, its importance for the

practice of psychotherapy and for personal change. He asserted "that humans use narrative structure as a way to organize the events of their lives and to provide a scheme for their own self-identity" (p. 178). We need to expand our understanding of this embedded power within story.

Is it the story or the storyteller that prompts a reaction or both? We must look below the tip of the iceberg for the answers. David Novak, recipient of the National Storytelling Network's Circle of Excellence Award, provided another view on making connections and the role of the storyteller.

> If I stand before you and tell you stories of my choosing and my creation based on our meeting here and now, I am doing something essentially different from another speaker performing my actions and my choices in imitation of here and now. It is a matter of degrees of separation, or perhaps more to the point, degrees of connection. The ability of the storyteller to be present, to listen as well as speak, to select and adapt as well as compose and recite, determine the extent to which the aesthetic distance can close. Once this quality is recognized and validated, we will be able to begin a true discipline of critique and analysis leveled at the telling experience (p. 12).

Statement of the Problem

Words are one of the most powerful tools we have to effect change. As noted by Warren Bennis (1996), effective leaders put words to the formless longings and deeply felt needs of others. They create communities out of words. They tell stories that capture minds and win hearts. I began this PhD program questioning why some people are so

resistant to change while others embrace it, and believing that leaders need, among other requisite skills, the ability to perceive and understand the emotional impact of change on themselves and others. Though not clearly known at the time, my deeper yearning rested on the issue of making connections. How, for example, can we, as business or community leaders, better connect with those we'd like to influence in some way? These are questions of the reflective practitioner.

During this journey, I rediscovered the power of story and its ability to connect with both the heart and mind of the listeners. We know that a space for reflection, which some refer to as a "storytelling trance," is created during the process of storytelling. But we do not know why listeners, upon hearing or co-creating a story, react the way they do.

The Grand Tour Question and Subquestion

What is the impact of story on the listeners and why do they react the way they do is my foreshadowed question. But it is not a question that sits alone. As a researcher, I bring a hermeneutic orientation to this study and am committed to interpretation of meaning as it arises from the exemplar story. There is also a subquestion that draws my interest. As a reflective practitioner, I'm interested in knowing how to apply this knowledge of story and storytelling for a social movement. How can we, as business or community leaders, better connect with those we'd like to influence in some way? A closer examination of this experience and the meaning that listeners attribute to the experience might reveal what impact story has on other factors such as identification, belonging or pride (Keogh, 2003). This knowledge would better inform business and/or community leaders on how to influence and connect with those whom they would lead.

> Reflection is what allows us to learn from our experience:
> it is an assessment of where we have been and where we want to go next.
> - Kenneth Wolf

Portraiture is a method of inquiry that allows for this closer examination by "capturing the essence and resonance of the actors' experience and perspective through the details of action and thought revealed in context" (Lawrence-Lightfoot & Davis, 1997, p. 12). It is an approach, based on the richness of the relationship between the portraitist and the actor, which respects and validates individuals' experience, knowledge and wisdom. While engendering contemplation on not only how we know what we know, portraiture fuels an examination on how we have come to know it as truth.

The Purpose of the Study

The purpose of this study then is to discover more about the power of story, a particular story, and storytelling leadership and its impact on listeners. It will look at what meaning can be derived from understanding the connection between storytelling and leadership. Listening to the story of Joan Southgate and her history making walk of the underground-railroad through Ohio across Ohio, Pennsylvania, New York and into Canada and learning about the story's impact provides the catalyst for this study.

At a surface level, Ms. Southgate's story appears to touch on the four themes that Palmer (2004), has mused on for years: "the shape of an integral life, the meaning of community, teaching and learning for transformation, and nonviolent social change" (p. ix). Her story reminds us that we cannot forget who we are and where we come from. In walking the paths of freedom seekers, she is both nurtured by and nurtures the

development of community. As a social worker she is a teacher at heart trying to affect positive change in others and her message is one of peace and hope for a better world. But the surface level is merely the tip of an iceberg. Below the surface and outside of cursory view, there's something deeper and more powerful about story and storytelling that connects with the listeners. This study will address the question – What is the impact of story on the listeners and why do they react the way they do? - by exploring the complexity, dynamics and subtlety of that phenomenon through the experiences of a selected group of story listeners.

Background and Significance of the Problem

Scholars have struggled for years to find a unified definition of leadership, from earlier approaches which looked at the notions of traits and behaviors (Stogdill, 1948; Gardner, 1989; Blake & Mouton, 1964) to contingency (Fiedler, 1987; Hersey & Blanchard, 1977), transactional and transformational models (Burns, 1978). What is agreed upon is that leaders "set out to influence the actions, beliefs and feelings of others and in this sense being a leader is personal" (Retrieved March 28, 2005 from http://www.infed.org/leadership/traditional_leadership.htm).

Joan Southgate and Storytelling Leadership

Leadership is a choice that anyone can make. But not everyone making that choice can be effective in using story and storytelling. Ms. Southgate's inspiration functioned as leadership through the power of story. Perhaps "for reasons of intelligence, knowledge, and experience," she was "able to express formulations of meaning in behalf

of a community" (Drath & Palus, 1994, p. 6). Her style of leadership is that of a natural leader, sometimes referred to as charismatic, powerful, and inspirational.

Warren Bennis describes charismatic leadership as a fuzzy but irresistible term and the leader who is enveloped by it causes us to care deeply about her and is able to create community. Ms. Southgate found a way, through story, to cut through differences and find what's shared. Using story and storytelling to say what people have in their minds and hearts; to allow them to see something they've not seen or imagined before (raising their sights, unlocking potential, focusing on possibilities); to find hope and invite others to do the same; and to cause them to want to struggle for some shared aspiration is storytelling leadership. By highlighting the courage and resourcefulness of the American slaves and conductor families who risked so much for freedom, Ms. Southgate, in walking the 519 miles of the Underground Railroad, created a powerful presence and full use of self in relating, not simply telling, the story.

It is also thought "that stories are the connective tissue of the human race …whether you are dissecting a school levy or the politics of South Korea …" (Banaszynski, 2002, p. 43) and just as there are no teachers without students, no leaders without followers, there are no storytellers without listeners. It is the story that holds the emotional glue between them. There is much we can learn about using stories to create emotional resonance. It would seem wise to heed the warning of Jerome Bruner, one of the best known and influential psychologists of the Twentieth Century, that "we should not write off this power of story to shape everyday experience" (Bruner, 2002, p. 7).

Storytelling has existed for thousands of years as a means of exchanging information and generating understanding. Anne Pellowski (1991), a storyteller consultant and former UNICEF worker, has written an historical rendering of storytelling that cites the following as origins of storytelling, that it:

1) Grew out of the playful, self-entertainment needs of humans;
2) Satisfied the need to explain the surrounding physical world;
3) Came about because of an intrinsic religious need in humans to honor or propitiate the supernatural force(s) believed to be present in the world;
4) Evolved from the human need to communicate experience to other humans;
5) Stemmed from the desire to record the actions or qualities of one's ancestors, in the hope that this would give them a kind of immortality; and
6) Fulfilled an aesthetic need for beauty, regularity, and form through expressive language and music.

It is through hearing stories that we learn from experiences we have not personally lived. "The story is one of the basic tools invented by the mind of man for the purpose of gaining understanding" (Collison & Mackenzie, 1999). As they go on to say: "There have been great societies that did not use the wheel, but there have been no societies that did not tell stories" (p. 38).

Making Meaning

Many varied definitions of story exist (Gilliam, 2004b). Still, one consistent thread throughout all the definitions is best stated by Bruner (2002) when he says that story is meaning. Meaning making refers to the way in which people actively organize their own experience, and as according to Kegan's theory, each individual experiences his or her world in a unique way; the same situation can have wholly different meanings for different individuals, or for the same individual at different times (1982, 1994). Drath (2001) goes so far as to say that all leadership is about shared leadership and is the process of meaning-making across different world views. As our world continues to

become more complex and fragmented, the need for understanding and interconnectedness is even more important.

Making Connections

In the inaugural issue of *Storytelling, Self, Society: An Interdisciplinary Journal Of Storytelling Studies* (Sobol & Gentile, 2004), Gioia Timpanelli offered one of several perspectives on storytelling studies. Timpanellis' love of the folktale comes from "a deep respect for its prodigious complexity":

> It is always done with the listeners and the storyteller in the same place. We are all together. The story parades for all and yet for each. The success of the communal evening depends on the teller's ability to tell the tale so well that the listeners' own desire, attention, and responses become part of the event. When the Imagination is awakened, the listeners become part of the moving experience of the story's creation and recreation. The storyteller is the intermediary between listener and story, between past and present. Storytelling is truly by its nature communal, common and inclusive, uncommon and inclusive (p. 15).

Storytelling creates an intense, focused silence, thus allowing the space for reflection to ask the who, what and why questions. It was so quiet in the room where I first heard Joan Southgate's story that we could hear each other breathe. Ms. Southgate responded to questions that sought an assessment on where we, as a people, have been and where we want to go next. This reflective discourse is what allows us to learn from our experiences or from the experiences of others.

Researching Story/Storytelling

Though storytelling is thought to be a most powerful means of communicating, very little scholarly work has been written about its use as a tool for leadership and leaders. One of the intuitive tenets of storytelling is that it is a medium of connectivity and of community. In *Storytelling, Self, Society: An Interdisciplinary Journal of Storytelling Studies*, (2004) Sobol, Gentile and Sunwolf provide an extensive list on those practitioners and scholars who have written on storytelling as being primary to their work. Yet, a disconnect remains between "many influential practitioners and theorists" p. 2) and what is known as applied storytelling.

This is storytelling that is used "as a tool in education, organizational development, social action, therapy, ministry, medicine and healing arts" (p. 5). The use of storytelling as a tool for leadership and leaders falls into the category of applied storytelling. The story and storytelling that my research will evolve from is, in fact, both a story and applied storytelling used for a social movement.

> The push and pull, the attraction and resistance, between storytellers and the Academy can also be seen in Jungian terms, as the opposition of *Logos* and *Eros*. The Academy has evolved in a patriarchal environment dedicated to the principle of *Logos*, the domain of rationality, knowledge, and abstraction. Storytelling embraces the feminine principle of *Eros*, which carries emotion, relatedness, and spirituality … (Sobol & Gentile, 2004, p. 5).

I liken this argument (between the Academy and storytellers) to those sometimes heard concerning the distinctions between management and leadership. In this instance, the Academy is to managers as storytellers are to leaders. One is not a substitute for the

other. The skills sets are complementary. Both are needed for long-term and sustained viability. Individuals can be effective at one or the other or both.

The art of leadership and the art of storytelling are inextricably intertwined. All leaders are, in effect, managers of meaning (Forster, Cebis, Majteles, Mathur, et. al., 1999). Gardner's (1995) view is that a successful leader senses the wishes of a potential audience and connects with them through the effective communication of story. Influencers, according to Gardner, are unlikely to achieve success unless their story is genuine, one that grows naturally out of their own experiences and touches the lived experiences of their audience. In conducting this storytelling research, I hope to contribute to the academic study of storytelling and to a greater understanding of the connection between storytelling and leadership.

The research will be bound by the drivers and passengers of the modern-day "safe houses" used by Ms. Southgate in the final leg of the walk. A Cleveland-based RVers traveling group, Lake Erie Travelers, heard her story and some members decided to act. They accompanied her and provided use of their recreational vehicles as "safe houses" from Cleveland, Ohio to Saint Catharines, Canada. What meaning did her story hold for them? What connection did her story make? What connection did Ms. Southgate make?

Making meaning and making connections are two reasons why researching story and storytelling is important. The general framework for beginning my qualitative study starts with the following research question (foreshadowed problem): What is the impact of story on the listeners and why do they react the way they do? Further, what can business and community leaders learn from the art of storytelling? What can business and community leaders learn from Joan Southgate's story and/or from Joan Southgate, the

storytelling leader? In conducting the study, I expect more questions to emerge from the interactive data collection. I hope to transcend ideas, relationships, reflections, and interpretations for the purpose of knowledge discovery on applied storytelling used for a social movement.

Summary

This part of the proposal provided a statement of the research problem, the description of the background and significance of the problem, the context and rationale for selecting the exemplar story and its importance to leadership and change, and situated the researcher within the exemplar story. Chapter Two is a review of the literature. It provides a contextual backdrop illuminating the expectations that prior research instills as I approached the study. Chapter Three is a descriptive account of the inquiry process and discusses the research design. Chapter Four describes the pilot study, including the research entrée and research activities, as well as revelations and insights gleaned from the pilot study. Chapter Five presents the data and findings from the main study and integrates the connections into portraits. Finally, Chapter Six discusses the implications of what was revealed and suggests possibilities for further inquiry.

CHAPTER 2

II. THE REVIEW OF THE LITERATURE: A BACKWARD GLANCE

There are three great mysteries in life: Air to a bird;
water to a fish and man to himself.
Author Unknown

Introduction

The goal of this chapter is to clarify the relationship of my study to literature on story and storytelling and then to previous research linking story and/or storytelling to leadership. To begin, I cite narrative studies that focus on meaning-making and practitioners and scholars who have written on storytelling. With specific relevance to my research question, the power of autobiography and the storytelling trance, the powerful phenomena that occur between storyteller and story listeners, are introduced in this section. Under the heading of framework for critiquing story and storytelling, I discuss various thoughts and theories on conceptualizing and explaining storytelling. Of particular relevance are Rosenblatt's (1938) theory of reader's response criticism and Langer's (1989) reader-based theory. The concept of storytelling leadership is examined through the lens of charisma and charismatic leadership. This review of literature presents an historical overview of these topics and introduces an orientation for my own interpretive efforts in combining phenomenological description with hermeneutic interpretation.

Meaning-making and Storytelling

Though there are many varied definitions of story, "they [stories] can transform our lives if we are open to their power, if the time is right, and if the person telling or hearing the story is ready" (Atkinson, 1995, p. 136). I use this same mantra – when the student is ready, the teacher will appear – when facilitating any learning experience.

Atkinson's book, *The Gift of Stories*, is organized around the theme of personal transformation through storytelling. His suggestions that there are three ways we learn things that are important to us also provide the basis for the three questions that give our life its meaning.

> First, there is the seeking of knowledge which answers the question "What do we seek in life? Second, the finding or attaining of that knowledge answers the question "What have we found? And finally, the applying or doing something with that knowledge once we have found it answers the question "How will we use it? (p.34).

Within the leadership literature there is recognition that making meaning is crucial to leadership and the leader's effectiveness (Gilliam, 2004b). And though "stories are not a panacea," nor is there agreement among storytellers on what stories can and cannot do; as a medium of connectivity, storytelling touches a center of life that we all have within us (Atkinson, 1995, p. 136).

As cited in Kouzes & Posner (1999) "Karl E. Weick has studied how we make sense of the often complex and contradictory decisions and events that go on daily in our organizations" (pp. 102-103). According to Weick (1995):

> The answer is, something that preserves plausibility and coherence, something that is reasonable and memorable, something that embodies past experience and expectations, something that resonates with other people, something that can be constructed retrospectively but also can be used prospectively, something that captures both feeling and thought, something that allows for embellishment to fit current oddities, something that is fun to construct. In short, what is necessary in sense making is a good story (pp. 60-61).

Language, and in particular stories, creates and recreates people, organization, and environment (Boje, 1997). Pondy (1978) describes language as a leadership game and contemplates:

> What kind of insights can we get if we say that the effectiveness of a leader lies in his [or her] ability to make activity meaningful for those in his [or her] role set – not to change behavior but to give others a sense of understanding what they are doing, and especially to articulate it so that they can communicate about the meaning of their behavior (p. 94).

Two scholars, Drath and Palus (1994), at the Center for Creative Leadership depict meaning-making as that which happens through such processes as identifying vision and mission framing problems, setting goals, arguing and engaging in dialogue, theory-building and –testing, storytelling, and the making of contracts and agreements (p. 10).

Their perspective on leadership is as a social meaning-making process that takes place as a result of activity or work in a group, instead of referring to leadership as a social-influence process in which individuals get others to engage in activity or work.

Leadership, then, is the process of connecting people to one another. “We speak of leadership as flowing from meaning instead of meaning as flowing from leadership” (p. 13).

> The notion of “the powerful individual taking charge is like the whitecaps on the sea – prominent and captivating…But to think about the sea solely in terms of the tops of waves is to miss the far vaster and more profound phenomenon out of which such waves arise …And so leadership may be much more than the dramatic whitecaps of the individual leader, and may be more productively understood as the deep blue water we all swim in when we work together” (p. 25).

To think of story as the single influential factor in the meaning-making process is to dismiss the power of storytelling, the effect of the storyteller and the involvement of the listeners in co-creating reality is no different from assuming that leadership is only about the leader.

Though the meaning-making process is on one level an individual activity, it is also necessarily social and collective. There is no leader without followers. There is no story without story listeners. My domain of interest is storytelling, the process for sharing, interpreting, and offering the content and meaning of a story to an audience. Where a story in itself may hold special power, it is only one of the three elements (the story, the teller, and the story listening audience) that make up storytelling. “Storytelling is an occasion when people co-author responses to Tolstoy’s great question of what shall we do and how shall we live” (Frank, 2002, p. 8).

We experience storytelling as a powerful means for connecting with one another and building a sense of community. Kouzes and Posner (1999) believe that great leaders

are great storytellers and dedicate an entire chapter in their book, *Encouraging the Heart*, to the art of storytelling. As "the most basic form of communication" (p. 101), storytelling has the ability to "reach inside us and pull us along" (p. 104), capturing heart and mind, to teach, mobilize, and motivate. Though many practitioners and scholars find storytelling primary their work, very little scholarly work has been written about its use as a tool for leadership and leaders.

> Practitioners and scholars across a wide spectrum of social, artistic, religious, therapeutic, and academic fields have been vigorously reclaiming the powers of storytelling as fundamental to their work. In homiletics, narrative theology (Frei); in medicine, narrative medicine (Charon, Frank, Mattingly); in history, narrative historiography (White); in the social sciences (Czarniawska, de Rivera and Sarbin), postmodern or reflexive ethnography and "thick description" – a conscious struggle with and surrender to the imperatives of narrative genres in field work reporting (Clifford, Geertz, Tyler); in communication, in narrative paradigm (Fisher, Langellier, Peterson, Sunwolf); in business, narrative management and the narrative organization (Demming); in psychology, narrative therapy (Kleinman, Polkinghorne, Sarbin); in education, narrative pedagogy (Egan, Paley); in cognitive science, narrative thinking and narrative mind (Bruner, Schank); in humanistic psychology, personal mythology (Bond, Campbell, Cousineau, Larsen, McAdams, Stromer)… - all these emerging fields and more have laid claim to the power of story (Sobol, Gentile & Sunwolf , 2004, p. 2).

Within storytelling, there is the story (content), the teller and the audience. It is from the interaction and cooperative, coordinated efforts of teller and audience that the storytelling trance emerges. This deep silence and intense form of focused attention is what Stallings (1988) refers to as an untouched field for further research. Within this domain of storytelling, the specific area of interest for study begins with the impact of the storytelling trance, the most profound and influential characteristic of storytelling, on the listeners, but more pointedly its influence on the response, behavior and/or actions that occur from hearing the story. For the purposes of this literature review I sought the following: What answers does research give to the impact of story on the listeners and why they react the way they do? Of what import is the art of storytelling to leaders and leadership?

Framework for Critiquing Story and Storytelling

The conceptual framework for critique is influenced by the theoretical principles of multiple disciplines, including psychology, cognitive science, literary philosophy, communication, rhetorical studies, medicine, counseling, and hypnosis. The principal elements come from a social constructionist standpoint and can be traced to the theories of meaning-making, narrative paradigm, reader's response criticism, and reader-based theory. All are helpful in conceptualizing and explaining storytelling.

Social constructivism takes phenomenology as a base to state that reality is multiple and that research should consider the meanings and intentions held by the social actors. Narrative is a form of social construction where, such as in the case of storytelling, emphasis is placed on the collaborative nature of making meaning. Hermeneutics is another influential school of thought regarding meaning. For hermeneutics, whatever is intelligible is accessible to us in and through language. Paul Ricoeur, one of the most distinguished philosophers of our time, posits that the proper study of human reality combines phenomenological description with hermeneutic interpretation (Dauenhauer, 2002). "In the final analysis self-understanding coincides with the interpretation given to these mediating terms [signs, symbols, and texts]" (p. 1).

Relevant Literature on Meaning-Making, Story, and Storytelling

Meaning-Making

Meaning-making is driven by the demands of life, which are patterned in age-related expectations, for example, in the domains of schooling, work, sex-roles and relationships (Kegan 1994). Hans-George Gadamer puts forth a similar view in his discussion on the meaningfulness in a work of art.

> There is no one definitive meaning which belongs to the artwork, because its meaning is a matter of the possibilities of application projected onto it by its various viewers. [on performing arts]…Each found in the play something different, which is a consequence, of course, of either having approached it on different occasions and with different concerns (Bontekoe, 2000, pp. 96-97).

During an interview, Robert Kegan suggested another question that we could bring to leadership and organizational development: "What are the mental demands implicit in the things we are asking people to do here to succeed?" (Scharmer, 2000, p. 10). The importance of this question to meaning-making relates to both leadership and storytelling. Leadership is concerned with meaning-making processes, such as creating a vision, mission or purpose that can be shared by all.

> The deepest nature of self are unchanging. They have to do with seeking to make our inner and outer experience cohere. They have to do with a kind of tendency to not only make experience cohere, but to become identified with the principle of coherence (p. 16).

To explore the communicative and connective power of storytelling holds promise for a greater understanding of that coherence between inner and outer experience. And, since "leadership increasingly is about leadership for processes of change" (p. 16), being able to effectively apply this knowledge in promulgating the value of self-imposed change is invaluable to leadership.

As is true with any form of communication, the intent and impact of a story are not always the same. Beech (2000), in a grounded theory study that uncovered four narrative styles of management, found this to be true where management could have an impact on employee attitudes but not necessarily in the direction implied by managerial intent. Though narrative style offers one way of seeking to understand divergence in sensemaking, story offers a multiplicity of interpretations because we hear a story differently based on who we are and where we are in life.

> Bontekoe (2000) asserts that all human understanding is hermeneutically circular. The possibility of our making genuine progress in comprehending something thus depends upon two factors; which taken together, define the structure of the hermeneutic circle: first, the steady accumulation (with minimal loss) of new information bearing upon the subject of inquiry and, second, the continued successful integration of this information (integration, of course, which will involve us both in sifting, and in weighing the relative importance of the information available) (pp. 6-7).

Though the structure of the hermeneutic circle was first recognized through the inquiry of researchers, such as Ast, Dilthey, Schleiermacher, and Wolf, into the methodology of

textual interpretation, Heidegger's work "demonstrated that human understanding in its entirety is essentially governed by the hermeneutic circle" (p. 8).

Storytelling, as with hermeneutical inquiry, "has no natural resting place, no point at which it can suspend its operations with a sense of the job well and thoroughly done" (p. 10). Storytelling can also be thought of in terms of dynamic systems theory; a system because all the variables (story, teller, audience) are related and dynamic because it describes an iterative process.

Narrative Paradigm

Narrative is a form of meaning making and narrative forms are extensive in qualitative research. Of particular relevance to my focus of interest is Frank's (2002) view on narrative analysis as being continuous with personal storytelling. In using narrative analysis, he cautions, we need all possible humility when asking what the analysis can bring to stories. For it is in the storytelling itself that people find voice and articulate the authenticity of self. Boje, Luhman and Baack (1999) presented a compelling argument as well in their study on the hegemonic moves in the construction of story and the urge to totalize the story into one grand narrative.

Hegemony refers to how "one voice is privileged in either taken-for-granted ways or too subtle to be acknowledged" (Boje, 2001, p. 35). These hegemonic moves, on the part of the qualitative researcher when analyzing data or completing the written narrative of a study, beg the question whose voice is being heard. Where Polkinghorne (1988), as cited by Boje (2001) states that all narrative inquiry is a process of narrative negotiations, Boje asserts: "In the narrative negotiations between qualitative researchers and the folk, the

folk are not doing too well, their phenomenal experience is reduced to readable and proper narrative" (p. 7).

Boje's point on voice is well made and one that is emphasized by Sara Lightfoot-Lawrence (1997) in *The Art and Science of Portraiture*. This research approach, portraiture, is meant to paint a vivid portrait or story that reflects the meaning from the perspective of both participants and researcher. Voice is the research instrument of the portraitist. The researcher's voice is first a witness to the story. Then as the researcher moves from thin to thick description, the interpretive voice is used. The search for meaning is influenced by the researcher's voice, her autobiography. Finally, voice refers to the presence of the researcher's voice discerning the sound and meaning of the participants' voices and sometimes entering into dialogue with them (p. 105).

This respect for voice is implied in Walter Fisher's (1989) narrative foundation of communication. His Narrative Paradigm rests on the following statements.

- People are essentially storytellers
- We make decisions on the basis of good reasons
- History, biography, culture, and character determine what we consider good reasons
- Narrative rationality (interpreted value) is determined by the coherence (does the story hold together and make sense in our world) and fidelity (does the story match our own beliefs and experiences) of our stories
- The world is a set of stories from which we choose, and thus constantly re-create, our lives.

The conceptual framework refutes the notion of the grand narrative. The stories people tell are evaluated based on the basis of whether they relate to the listeners' own personal values and experiences. These stories, in fact, are shaped by history, culture, and

character. Fisher offers a way to understand all communication, for narration refers to every verbal or nonverbal bid for a person to believe or act in a certain way. He is not predicting how we act but explaining how we, as storytelling animals, take information and transform it into narrative stories.

Reader's Response Criticism

A principal element from literature that influenced my focused interest in storytelling comes from the theory of reader's response criticism. Though not deterministic, this informative theory explains how the storyteller influences the meaning-making process. In *Literature as Exploration*, Louise Rosenblatt's (1938) classic work on reader response literary criticism has served as a model for the teaching of literary texts for more than fifty years. The description of what occurs for a group of readers together in a reading environment is comparable to what occurs between storyteller and story listeners. An abbreviated description of this process involves the following:

> A group of readers together in a reading environment… may be thought of as an interpretive community.… If an adult intermediary is reading aloud, the quality (tone, emphasis, enthusiasm, etc.) of the reading may influence young people's meaning-making…The entire procedure then is one of metacognition in which participants are assisted in gaining an awareness of their own thought processes as meanings grow and are shaped both personally and socially (Retrieved January 9, 2005 from http://www.scils.rutgers.edu/~kvander/readerresponse.html).

Though there is a movement toward shared meaning, not all will ascribe to it. In fact, Rosenblatt found that even if it were unanimously shared, that meaning would be an

event in time and would shift and change to some degree, even within the same interpretive community. Atkinson (1995) discussed a similar result with stories where "the same story may touch one person very deeply while for another it might not mean a thing" (p. 136). My own experience on the occasion of one telling of Joan Southgate's story, which held a healing element for one story listener, confirms this learning. Not all will experience the same story in the same way.

With this framework as my orientation toward meaning-making and storytelling, I sought answers to two questions: First, what does the scholarly literature suggest about the impact of story on listeners and why they react the way they do? And second, what does this literature have to say about the art of storytelling as it affects leaders and leadership?

In looking at management narratives, Beech (2000), questioned the assumption that it is possible to make changes in employees' attitudes and inner cognitive states in the direction intended by actors who seek to manage the change. He found that management could have an impact but not necessarily in the direction implied by managerial intent. One way he accounted for trying to understand divergence in sensemaking and action was through different narrative styles.

This parallels my own thinking on the influential role of the storyteller in the storytelling process. This influence goes beyond style to one of substance. I believe that people don't care how much you know until they know that you care. In *Leading Minds: An Anatomy Of Leadership*, Gardner (1995) constructs a similar view when he states that leaders embody their stories. "Leaders…convey their stories by the kinds of lives they themselves lead and, through example, seek to inspire in their followers…People who do

not practice what they preach are hypocrites, and hypocrisy mutes the effectiveness of their stories" (pp. 9-10). Kouzes and Posner (1999) assert "the best leaders care" (p. xvii) and proceed to support this point in *Encouraging the Heart* through research and example. One exemplary occurs in the film *In Search of Excellence: The Video* (as cited in Kouzes & Posner, 1999, pp. 15-22). In this film, Tom Melohn, past president of North American Tool and Die (NATD) puts a twist on managing by walking around (MBWA). Through personal example, he has coined the phrase "CBWA: caring by walking around" (p. 22) by catching people at their best, then used story to personalize recognition and celebrate together. Melohn is seen as a leader who cares.

"Narrative is everywhere and is as natural as the trees in the forest" (Keogh, 2003, p. 1). In his study on organizational narrative and its practical use within the organization, Keogh found that storytelling can be used as an effective tool for creating improved understandings, commitment and ownership regarding tactical and strategic goals. However, he cautioned that: 1) organizational storytellers need to know how far to go in embellishing a story in connecting with the listeners; 2) storytellers need to think their endpoints through very carefully; 3) stories need to be told by competent and credible individuals; and 4) practitioners need to fully understand the role storytelling plays in the health and well being of the organization. Once again, the importance of the role and authenticity of the storyteller, whether a business or community leader, in connecting with the story, is highlighted.

Storytelling Organization (STO)

Hansen & Kahnweiler (1993) noted: "the concept of multiple interpretations of a given event or relationship in corporate settings has received scant empirical attention"

(Bartunek & Moch, 1987; Young, 1989). One early response to this dilemma came from David Boje (1991) who, through his study of an office-supply firm, introduced storytelling organization (STO) research. By focusing on in situ everyday performance behavior, Boje was able to observe a CEO and other executives (stakeholders) "tell stories to predict, empower, and even fashion change" (p. 124).

Though her study demonstrated the collective sense, rather than the process of constructing shared meaning, Boyce (1995) uncovered similar results. Her premise is that all organizational members are meaning-makers, accomplished by examining the collective sense (shared meaning) that exists across the organization, and by engaging all meaning-makers in conscious reflection on shared meaning.

As cited in Boyce's study, her framework followed McWhinney's (1989) work on paradigms and systems theories (p. 110) as it relates to the kinds of participation expected from, and performed by, each party in a patient-centered medical consultation. Those four systems of thought include:

1. A dynamic model which assumes that expressions of shared meaning are descriptive of what is current.

2. A communicative model that assumes that shared meaning is negotiated or accepted; and developing shared meaning, therefore requires group membership, time spent together, and shared experience.

3. An evolutionary model where shared meaning evolves over time.

4. A field model in which shared meaning is consciously co-created by participants.

Boyce's study resulted in the identification of five intentional uses of shared storytelling:

1. Confirming the shared experiences and shared meaning of organizational members;

2. Expressing the organizational experience of members;

3. Amending and altering the organizational reality;
4. Developing, sharpening and renewing the sense of purpose held by organizational members; and
5. Preparing a group for planning, implementing plans, and decision making in line with shared purposes.

Another study, according to Boyce, is needed to demonstrate collective sense-making as a vehicle of shared storytelling. Quong & Walker (2000) built upon the ideas of researchers such as Boyce (1996) and developed a 4-stage story-based model of change. Their approach holds that effective leaders are good listeners who actively encourage storytelling and retelling to bring about change. Their findings suggest that the deliberate encouragement of storytelling to stimulate, clarify and explore the problem provided a meaningful, communicative vehicle for values, feelings and attitudes to emerge.

Boje (1998) believes that stories and storytelling are constitutive of organization, rather than mere measures of an organization's culture, climate, or knowledge. His research is bound by stories-in-context, "the in situ performance context of storytellers influencing one another and the historical context of local embeddedness of micro (little people) stories in wider macro stories of grand (dominant) political, economic, social, and ecological context" (p. 1). The story, in Boje's opinion, does not exist apart from the context in which the story is performed. It matters who (manager, subordinate) is telling the story, whose voice is privileged in the telling. Listeners may draw very different points from a story than the teller imagined. In postmodern storytelling research, the focus is to link local story to embedded social, economic and cultural context.

Other research studies, such as Kainan (1995), Luwisch (2001) and Bailey (2002) concluded with similar findings. Meaning through story is a social construction where we co-exist and co-create. Patricia Bailey's (2002) ethnographic study into storytelling and the interpretation of meaning disclosed a story told twice by the same person with different meanings. Study results recognized that storytellers select the components of the stories they tell (reconstruct) in order to convey the meaning they intend the listeners to take from the story. Stories are always reconstructions of the events they describe. "It is meaning," Bailey asserts, "not truth that is conveyed in the form of stories" (p. 581).

These research findings are not lost on the practitioner. Douglas Ready (2002) references qualitative research, involving interviews and case studies, conducted on innovative and effective leadership development practices. Storytelling initiatives emerged as examples of excellence. He suggests five key components (context-specific, level-appropriate, respected role models as tellers, drama, and high learning value) that meld with the notion that storytelling is comprised of the story, the teller and the audience.

Appreciative Inquiry and Generative Theory

In 1980 David Cooperrider, then a doctoral student at Case Western Reserve University in Cleveland, Ohio, discovered while gathering his data an inquiry process that focused on life-giving factors. The term "Appreciative Inquiry" was first written about in an analytic footnote in the feedback report of emergent themes by David Cooperrider and Suresh Srivastva. Ken Gergen published *Toward Transformation of Social Knowledge* in 1982. He proposed a new method called generative theory "that has the capacity to challenge the guiding assumptions of the culture, to raise fundamental

questions regarding contemporary life, to foster reconsideration of that which is taken for granted, and thereby furnish new alternatives for social action." So as generative theory had a significant impact on Cooperrider's thinking, both appreciative inquiry and generative theory were influential in my own reflections on Joan Southgate's story. (Retrieved January 28, 2005 from http://appreciativeinquiry.cwru.edu/intro/timeline.cfm).

> AI involves, in a central way, the art and practice of asking questions that strengthen a system's capacity to apprehend, anticipate, and heighten positive potential… Taking all of these together as a gestalt, AI deliberately, in everything it does, seeks to work from accounts of this "positive change core"—and it assumes that every living system has many untapped and rich and inspiring accounts of the positive. (Retrieved January 28, 2005 from Appreciative Inquiry Commons http://appreciativeinquiry.cwru.edu/intro/timeline.cfm).

Ludema (1996) and Neal (1999) used both AI and generative theory in their studies. Ludema suggests:

> That since life is relational and all narrative accounts are imbedded in still larger narrative accounts which in turn are embedded in larger narrative accounts, a more interesting and potentially fruitful area for research would be to study the ways that stories gain their intelligibility and generativity within human collectives. How can organizational science contribute to finding within people's stories the deeper yearnings and expressions of hope that exist in order to highlight them and craft them into generative stories of good news? (p. 202).

This is exactly what Joan Southgate has done. Her mission – to help heal the wounds of slavery and celebrate examples of interracial harmony – is fueled by ”an uplifting story that focuses on the kind and generous people - - many of them strangers - - who were drawn to her effort to honor the people of the Underground Railroad” (Southgate & Stewart, 2004, p. 9). Using a generative theory perspective, Ms. Southgate employed a recontextualized referent mechanism to lift various terms from their conventional context, and place them in alternative contexts, subsequently altering their meaning. Where the majority view holds that slaves were ignorant and fearful, Ms. Southgate asks us to consider alternate interpretations. Consider, for example, the requisite intelligence it took to plan an escape and the risks and dangers encountered by freedom seekers undertaking these perilous journeys. Her story about the anti-slavery movement is a generative reinterpretation. Indeed it is an articulation of a minority interpretation, a story of hope and praise.

Generative theory takes into account how metaphors have significant influence over social action. For example, the underground-railroad was not a real railroad, but a network of houses and other buildings used to help slaves escape to freedom. Freedom seekers usually traveled secretly at night and were hidden in safe houses (barns, haylofts, underground basements). Ms. Southgate’s story integrates an alternative metaphor for a safe house. Her “safe houses were homes that friends, friends of friends and sometimes complete strangers had volunteered” (Southgate & Stewart, 2004, p. 34) for her journey. She was also provided safe houses from the drivers of recreational vehicles who accompanied her on one leg of her trip. It was easy to see and accept this visual substitution for a modern day safe house. “The generative metaphor also lends itself to

creative elaboration …" (Gergen, 1982, p. 144). As Ms. Southgate's 519-mile walk ended, a new mission emerged – saving a local Cleveland, Ohio landmark, the Cozad-Bates home, that was integral to the underground railroad activity. The goal is to turn this "home into a true 'safe house.' Safe to explore, listen, collaborate, learn and teach" (Southgate & Stewart, 2004, p. 258).

Polyphonic Microstories

As defined in chapter 1, the notion that there exists within a grand narrative layers of embedded polyphonic microstories and storied relationships is the argument put forth by Boje (2001) and supported through the works of others (Kainan 1995, Luwisch 2001 and Bailey 2002). Joan Southgate's story is an example of an embedded polyphonic microstory situated within a grand narrative of freedom seekers and conductors. As a storytelling leader, she has made connections in the wider community and fostered social change to a greater good.

Leadership and Storytelling

Neal (1999) made the connection between leadership and storytelling, relying on Gardner's (1995) work on the lives and stories of eleven twentieth-century leaders and the differences between the ordinary, innovative and visionary leader. She also noted that "organizational stories require listeners. Leaders and followers have roles as listeners in the creation of stories. Indeed, the stories have meaning only when received by listeners who give the story its meaning as a result of social construction" (p. 22).

Gardner's research shows that stories of identity, narratives that help individuals think about and feel who they are, where they are from, and where they are headed,

"constitute the single most powerful weapon in the leader's literary arsenal" (p. 43). Neuhauser (1993) takes a similar view on the importance of the storyteller leader when she discusses the purpose of an organization's mythology or the key stories that leaders tell. The purpose of an organization's mythology is to answer the same questions that myths have answered in cultures everywhere (p. 48):

Where did we come from?

What is the purpose of my life?

With whom do I belong?

What are my duties and obligations?

What is taboo?

Who are the enemies?

Neal's (1999) objective was to understand the characteristics of the stories and narratives told by organizational leaders and to determine how leaders' stories inspire the expansion of organizational capacity. Using an epistemological base of appreciative inquiry and grounded theory, she posed appreciative questions to 12 organizations. Employing a generative theory perspective, she asked not what's true but what is striking, intriguing, and unusual.

With respect to the power of story, Neal identified 7 propositions and found 12 reasons that stories are powerful. These 12 reasons emerge from within the first proposition, that stories of inspiration are to organizations as breathing and oxygen is to the human body. Stories:

1. Speak to both parts of the human mind, its reasons and emotion.

2. Give meaning to people's lives and their relationships by telling their experiences through stories.

3. Can help us make connections with something that is greater than ourselves.

4. That tell who we are when we are at our best give the greatest cause for pride and fulfillment.

5. Ignite the imagination and provide fuel for creating futures of hope.

6. Transmit cultural values and understanding.

7. Enhance interpersonal relationships and connections with others.

8. Are used for sense-making especially in turbulent times, to help reduce anxiety and tension created by dualities.

9. Support moral development.

10. Transmit our deepest values and commitments.

11. Impart intergenerational wisdom.

12. Become a primary leverage point for organizational change and transformation associated with building a new culture.

This section on leadership and storytelling is best summarized through the seminal work of Howard Gardner who asserts:

> The ultimate impact of the leader depends most significantly on the particular story he or she relates or embodies, and the receptions to that story on the part of audiences (or collaborators or followers) (p. 14).

Gardner deliberately uses the term story rather than message to emphasize the dynamic, collaborative nature of creating a desired future. In his summary, he describes the exemplary leader as one who is a skilled speaker, and displays a keen interest in, and an understanding of, other people. "At a special premium are the capacities to adjust stories

in light of changing circumstances while still adhering to basic principles and remaining –and appearing to remain –an individual of conviction" (p. 288).

Autobiography

Sidonie Smith points out "however understood, the subject [narrative] fascinates us and so the contemporary fascination with personal narrative" (as cited by Byrne, 2002, p. 1). We're fascinated by the power embedded in self-narration. It is an act of creation, of seeking and/or clarifying personal identity and self-understanding. In Byrne's (2002) *Narrating the Self*, she ponders the thought that narrative depends on a notion of wholeness and completion. But where this can be enabling, it can also be repressive or challenging. What of those whose stories are, by their own assessment, incomplete? What of the struggle to respond when asked to give an account of one's self? What if you can't see the picture because you're inside the frame? Though I believe in the principle of Gestalt, that the whole is greater than the sum of the parts, I believe equally in the significance of each part that goes into a self-defined whole. This quest for wholeness is created moment to moment, and as according to Byrne (2002) "there is no self waiting to be discovered … it is a process of creation and re-invention out of available resources" (p. 3).

Eisner (1985) states that "we all bring to events, situations, and objects certain preconceived ideas…" Whether a story has meaning in the creation of our own personal narrative rests upon "whether what we bring to the world is useful for the purposes we consider important" (p. 243). Where Boje argues that there is no ending or complete story, Rosen (1988) asserts that narrative "is both how it was and how it is fused

together." This, he explains, is the concept of the double-voice of autobiography that engenders the feel of authenticity for a story.

> … a recognizable narrative is both constructed by and understood by a frame derived from past experience BUT the experience was originally understood by one frame and is now understood by a new one which includes understanding of the original frame (p. 85).

It does not have to be a complete story to be an authentic story. As a researcher, I must honor and respect the voices of my conversation partners as they share their personal stories on what is important and understood in that moment of time.

Storytelling Trance

Labov (1972:396), as cited in Rosen, 1988, noted that oral accounts of personal experience command a unique attention from listeners.

> Many of the narratives cited here rise to a very high level of competence; … they will command the total attention of an audience in a remarkable way, certainly a deep and attentive silence that is never found in academic and political discussion (p. 81).

Where Neal, Gardner and Labov recognize the power of story, others, like Jenson (2000) and Sturm (1999) have taken a deeper look into the power of the storytelling trance.

Jenson (2000) demonstrated through personal story her own experience with the storytelling trance.

> Although theorists disagree as to whether myth provides answers or simply unearths more questions, most will agree that going deeper into the experience of life through mythic narrative takes us down into understanding … even if one believes the why and how questions are not answered (p. 26).

> Stories, narratives, and myths often provide the opportunity to see, perceive, or reframe events in a new way. The realization of the new perspective hits unexpectedly, like an aha experience, as if truth just snuck in through the back door and startled you. Hillman describes this experience as the process of seeing through (pp. 28-29).

We live in times of unprecedented change where most of what was familiar and a lot of what was valued no longer exists. We turn to what provides some sense of comfort. As Jensen found in her work, we believe that what lies behind or within is truer and more real. “It is the value of narrative as a source of deep self-understanding that stands out as a critical need in this moment of millennial transition” (p. 29).

In Sturm’s (1999) study, he was interested in developing a theoretical model of the storytelling trance and the applicability of the findings to library media specialists. His research found that participants’ comments followed the first three of Langer’s (1989) stances: the process of moving toward the experience, being in it, and moving away from it. As Langer’s research has a great influence on my focus of interest, it will be described in greater detail later in this section. The final stance, involving how the reader uses the information, was not addressed in Sturm’s study.

We know that people who listen to stories can undergo a profound change in their experience of reality. “There are many influences on a listener’s state of consciousness during a storytelling event that may either increase or decrease the likelihood of a trance state occurring” (Sturm, 1999, p. 16). Sturm found positive influences on the storytelling trance to include the following: listeners interviewed mentioned the storytelling style; the

activation of the listeners' memories; the listeners' feeling of safety or comfort (both physical and emotional); the story content, the storyteller's ability, the storyteller's involvement in the story; the listeners' expectations being met; the listeners' personal preferences being matched; the listeners' occupation or training; the sense of a rapport between the listeners and the storyteller; the novelty or familiarity of the story, rhythm, humor, and recency. The distractions or negative influences involved visual, auditory, kinesthetic, technical, durational, and rhythmic factors.

Literary Analysis

Langer's (1989) work in developing an underlying theory for the teaching of literature may be applied to my own area of interest. Her qualitative study into the nature of the meaning-making process that contributes to students' understanding of reading literary and non-literary texts revealed a series of relationships the reader takes toward the text. Each stance adds a different dimension to the reader's growing understanding of the piece. Where teachers are comfortable using process-oriented and text-based approaches to teaching literature, Langer has been working to develop a different approach, a reader-based theory. The focus here is making sense of the literature from the reader's point of view.

In the same fashion that Jo Radner (Sobol & Gentile, 2004) invited the reader to substitute the word "storytelling for music, storytelling studies for musicology, and storyteller for composer" as he explained their similar journeys to being viewed as serious areas for academic study, I invite the reader to substitute the word listeners for readers, story for text, reading for storytelling in the following description of Langer's stances (p. 17).

The four major stances in the meaning-making process, as proposed by Langer and further developed by Carla Zamerelli-Clifford, reading specialist, are:

Being Out and Stepping Into an Envisionment (Initial, Global Understanding) – Readers [Listeners] attempt to make initial contacts with the genre, content, structure, and language of the text [story] by using prior knowledge, experiences, and surface features of the text [story] to identify essential elements in order to begin to construct an envisionment. This corresponds to the construction of meaning during the reading (storytelling) experience.

Envisionment is a personal text-(story-)world embodying all she or he understands, assumes, or imagines up to that point in the reading (storytelling).

Being In and Moving Through An Envisionment (Developing Interpretation) – Readers (Listeners) are immersed in their understandings, using their previously-constructed envisionments, prior knowledge, and the text (story) itself to further their creation of meaning. For the reader (listener), meaning-making moves along with the text (story). In this stance, for example, the reader (listener) may be caught up in a story or may be carried along by the argument of a non-literary work. They take new information and immediately use it to go beyond what they already understand, asking questions about motivation, causality and implications. This corresponds to extending meaning.

Stepping Back and Rethinking What One Knows (Personal Reflection / Response)– In this stance, readers (listeners) use their envisionments to reflect on their own previous knowledge or understandings. While prior knowledge informs their envisionments in the other stances, in this case readers (listeners) use their envisionments to rethink what they already know, to reflect on the lives of others, or the human condition.

Stepping Out and Objectifying The Experience (Critical Analysis) – In this stance, readers (listeners) distance themselves from their envisionments, reflecting on and reacting to the content, to the text (story), or to the reading (storytelling) experience itself. They objectify the text (story), judge it, and relate it to other texts (stories) or experiences. This corresponds to examining meaning.

Langer also found that while readers work through these stances in reading both literary and non-literary works, their orientation toward meaning differed. During the reading of non-literary texts, the sense of the whole provides a steady reference point. As the envisionment unfolds, the new details may clarify the nature of the whole, but they rarely change it. The reader relies on the constancy to monitor initial understandings or misunderstandings of the details. The pattern is to use the content they read to gain facts.

In the reading of literature, the sense of the whole changes and develops as the envisionment unfolds. It exists as a constantly moving horizon of possibilities. The reading is guided by inquisitiveness and wonderment. They clarify ideas by searching feelings, intentions, motivations, implications, assumptions, values, and attitudes. The

similarity between this and storytelling is striking. It is this fourth stance that I will explore with my conversation partners. I will ask them to reflect on Joan Southgate's story, her storytelling and their experience in being a part of this history-making walk. And, together we will examine what meaning they attribute to the experience.

Charismatic and Storytelling Leadership

Sometimes we are awed by a leader and blindly follow the person. The great German scholar, Max Weber (1864-1920), was interested in leaders who had the ability to influence the behavior of others without the use of force. He observed that the capitalist entrepreneur had three choices: be charismatic, bureaucratic, or traditional (Weber, 1947). The bureaucratic leader relies on rational legal hierarchical power. Traditional or feudal leadership rests on traditional authority, possibly handed down from the past, obtained through favoritism, loyalty or politics. According to Weber, charisma is an individual characteristic that sets the leader apart from ordinary people. The charismatic leader is endowed with supernatural, superhuman powers and heroic qualities. Followers are influenced by their personal charm, character and charisma, which is a strange, captivating, and perplexing phenomenon.

> House, Howell, Shamir, Smith, and Spangler (1993) argue that charismatic leadership may be defined in terms of charismatic leader effects on followers, leader behavior that leads to charismatic effects, or attributions of charisma to leaders by followers and observers. In the leader effects definition, charismatic effects can be demonstrated by the degree of similarity between the leader's goals and values and those of the followers, the extent of followers' emotional attachment to their leader, the tendency of the followers to exert extra effort and perform exceptionally in the absence of clear rewards and punishments, and the willingness of followers to make personal sacrifices in the interest of the

> collective mission articulated by the leader (Shamir et al., 1993), as cited in Howell, 1997.

The leader effects definition describes what occurred between Joan Southgate and the RVers who decided to accompany her on the last leg of the journey.

The second definition of charismatic leadership is behavioral, concentrates on exchanging inducements for desired performance and is results-focused. Ms. Southgate did not articulate an end result. On the contrary, she stated: Now that the walk is done, the journey begins. She did not communicate high expectations to the followers but asked them to join her in this journey. The third definition of charisma is formulated in terms of attributions made about the leader by observers. Taken from Greek *kharisma*, divine favor, Joan Southgate exhibits a more subtle charisma or gift of grace. She had the ability to carry the masses with her on this journey and had a great deal of emotional appeal. She was followed by virtue of personal trust in her and her exemplary qualities because they fell within the scope of the follower's belief in her charisma. The quality of her leadership captured the imagination and inspired commitment and devotion.

While charisma is thought to be a certain quality of an individual personality, it is also a co-constructed relationship. Ms. Southgate is a strong presence wherever she goes. But the source of her power has nothing to do with the sort of mystical aloofness or alluring distance associated with the widespread notion in our popular vocabulary of the charismatic leader. She focused on relationships, on getting to know people of all backgrounds and ages, on being a bridge leader, on listening across boundaries of difference, and on teaching as well as learning. Charismatic authority can be deferred to heroes in a war, people of legal wisdom or a shaman.

Ms. Southgate's insight into what matters most stems, in part, from her knowledge of self and recognition of a great need in the world that she felt drawn by her conscience to meet. Covey (2004) calls this an act of finding "your voice, your calling, your soul's code" (p. 5). With a steadfast belief in the goodness of people, Ms. Southgate set out on a journey to honor that goodness. In doing so, she became the *Fundi* of the untold story of the Underground Railroad. "*Fundi* is a Swahili word for the person who possesses practical wisdom and is skilled at passing on to new generations the knowledge that the community's elders regard as most important" (Retrieved November 7, 2005 from http://www.advancingwomen.com/awl/social_justice1/Preskill.html).

Ms. Southgate found her voice and articulated it through storytelling. With storytelling leadership, she told a recurring story that revealed her identity, underscored followers' goals and highlighted the values that followers, her story listeners, both espoused and enacted. Her stories helped the followers to understand "who they are, where they come from, and where they are headed" (Gardner, 1995, p. 43).

The studies examined in this literature review demonstrate the broad range of research orientations in the field of meaning-making, story, storytelling and storytelling leadership. As mentioned in Chapter 1, my interest was in the participants' narrative truth, the telling of their experience with Joan Southgate and the method of inquiry, portraiture, which allowed each portrait to stand alone and be woven together in yet another story. Each person's story is "a personal representation of the individual's experience and understanding of what life is about" (Cramer, 1996, p. 5) and as such, each storyteller would claim to have a handle on the truth.

Boje believes that “people are always in the middle of living and tracing their storied lives” (2001, p. 5). His multi-voiced methodology respects the polyphony of voices found in any telling and asserts that “Tamara is a way to describe how storytelling as antenarrative occurs in complex organizations” (Boje, 2001, p. 4).

> In *Tamara*, Los Angeles’ longest-running play, a dozen characters unfold their stories before a walking, sometimes running, audience…Instead of remaining stationary, viewing a single stage, the audience fragments into small groups, that chase characters from one room to the next…and co-create the stories that interest them the most (Boje, 2001, p. 4).

Within the complexity of our modern world, this same phenomenon occurs with Joan Southgate, as storyteller, and her story listeners, my conversation partners. As stories are shared, “the spin changes depending upon the audience and the aspects of the story the teller elects to accent” (Boje, 2001, pp. 70-71). For every story told by Ms. Southgate and my conversation partners, the potential for the co-creation of yet another story exists. My intent in this study is to allow these polyphonic voices and meanings of life to be heard.

Implications for Research

As suggested, stories often leave us with unanswered questions. In concluding his phenomenological study, Keogh (2003) identified the following implications for future research.

- What impact does narrative have on factors other than performance such as identification, belonging, pride, loyalty and others?
- Do stories lose any context with each successive telling and, if so are there potential issues or problems?
- Would a study of differences in story acceptance be attributable to definable groups of people? This might be along age, racial or gender lines and would speak to that group's acceptance along specific demographic lines. This would allow a management to reach its employees on an even more efficient basis.

In thinking about my proposed study and the nature of qualitative research, I may discover factors, such as those suggested by Keogh that hold impact for the listeners to Joan Southgate's story. Secondly, considering the time lapse between when the RVers first heard Ms. Southgate's story and when the research begins, other issues, problems, or opportunities could surface, have impact on the listeners and subsequently hold some influence on the data collected. And, finally with respect to Keogh's third proposition, my research will be bound by a select group of listeners who hold differences in age, race and gender. Although my focused interest of study does not rest on the acceptance or non-acceptance of a story but on understanding how the listeners interpreted, used, and

acted on that information, it will be important for me to note demographic differences in my research design and interpretation of the data.

Summary

This literature review cited a number of prominent thinkers and theories relative to the importance of story from a social constructionist standpoint and the pivotal influence that story and storytelling plays in meaning-making. These thinkers recognized the inherent power that exists within story. Several noted the importance of further investigation into the storytelling trance. With leadership as a social meaning-making process, it is important to develop a better understanding of the storytelling trance - this deep silence and intense form of focused attention - its effects on the listeners and on how we can use storytelling as a leadership tool to make meaning, build community, and influence desired behavior change in both business and community sectors.

Understanding the impact of story on the listeners and why they react the way they do was at the heart of this study. What can be learned about the listeners' critical analysis of the story - the examination of meaning that occurs in Langer's fourth stance - that offers potential value for storytelling leadership? This was the gap I believed this work would fill. The uniqueness of the study lies in examining the "stepping out and objectifying the experience" that Langer described and Sturm (1999) did not address.

Through this literature review I sought the following: What answers does research give to the impact of story on the listeners and why they react the way they do? Of what import is the art of storytelling to leaders and leadership. I learned that:

- Story is meaning.

- Meaning-making is an individual, as well as a social/collective, process where interpretations are co-created.
- There are multiple interpretations of a given story that cannot be separated from its context.
- This contextual understanding is influenced by history, biography, culture, lived experience, religion, level of consciousness, personalities, attitudes, and individual and shared personal values and beliefs.
- The impact of story can stimulate our minds and touch our hearts.

Therefore, a story is a description of what's current and foremost in thought and evolves over time. How, then, does story and storytelling hold importance for leaders and leadership?

Just as stories are co-created, it is equally true that leadership is a social meaning-making process. Charisma and charismatic leadership hold significance for storytelling leadership based on emotional appeal, trustworthiness, and congruence of values between leaders and followers. Leaders must have an understanding of and caring about people that is demonstrated through the stories they tell. The leadership literature states that developing relationships, making connections and communicating meaning is crucial to effective leadership. Further, in order to effect a desired change, leaders must engage the rational and emotional capacity of listeners in such a way that they will want to struggle together towards some shared aspiration. Where man is a storytelling animal and collective sense-making is an essential function of leaders, story and storytelling make possible the fundamental connection that leaders must tap into in order to establish shared meaning.

The purpose of my study was to use portraiture as a means of uncovering this shared experience, in a way that I had not found to be attempted before in earlier research. Portraiture recognizes the humanity in others and respects the individual voice

of meaning-makers. It is an anti-hegemonic research approach that does not impose the portraitist's story over others.

This study allowed for an examination of meaning by engaging the conversation partners in conscious reflection on shared meaning and sought to make known a richer understanding of our underlying relatedness.

Little scholarly work has been done on the behavioral influence stemming from the storytelling trance or the link between storytelling and leadership. Though practitioners are using story as a leadership tool, research is limited on its use in creating shared meaning and effecting desired change in the community and business sectors. Its power and potential need to be better understood. This hermeneutical study examined the power and meaning of story, in particular the after effects of or the distancing from the storytelling trance and how it influenced behavior in a community. It sought to understand the dynamics and meanings these influences had on a select group of listeners and how this impact could be effectively applied by leaders in a business or community setting.

The next chapter lays out the research process. First, it describes the thought process that led to the selection of a particular qualitative approach, that of portraiture, for this study. It then describes the principles of portraiture and the design of my research.

CHAPTER 3

III. THE RESEARCH SETTING: FRAMING THE TERRAIN

Their story, yours, mine – it's what we all carry with us on this trip we take,
and we owe it to each other to respect our stories and learn from them.
- William Carlos Williams (as cited in *The Gift of Stories* by Robert Atkinson)

Introduction

In considering the study from the stance of a qualitative researcher, I was aware of the subjective nature of my work. Inquiry into the narrative of slavery is an issue about which I felt strongly. I realized that I needed to account for my research approach and interpretation of my findings based, not only on my personal experiences and beliefs, but also in terms of the literature in my field of inquiry and in the area of research theory and practice. The purpose of this study was to examine how a particular story and the power of that story, told by Joan Southgate, a storytelling leader, of walking the 519 miles of the underground-railroad in Ohio across Ohio, Pennsylvania, New York and into Canada impacted a selected group of people. Through conversation, I sought to understand what meaning occurred for my conversation partners. In this chapter I framed the terrain for this project by describing the following: 1) beliefs and rationale for selecting portraiture as a research approach; 2) the principles of portraiture and aspects of essentialist portraiture; 3) the research design and research activities; and 4) criteria for assessing trustworthiness of the research.

Research Method Selection Process

Qualitative research includes many traditions, perspectives, methods, and approaches and is used by a diversity of disciplines/fields. Given the diverse methods available within narrative inquiry, I considered a few methods and then selected an approach that was most fitting for my study (Retrieved July 2, 2004 from http://www.niu.edu/~sorensen/502/powerpoint/topicD/qlnotes.htm). Case study research requires observation on a regular basis, over a period of time to determine what can be learned from a particular case. This was not feasible given that I would have limited access to the potential research participants. Ethnography studies the cultural patterns and perspectives of a group in its natural setting. The research is sustained over time. For my proposed study, there was no one particular place that constituted a natural setting. Not only is an ethnographic study time intensive, it is highly dependent upon the researcher's observations and was not a viable alternative.

Semiotics/discourse analysis is the study of linguistic units. It looks at the relationship between words and their meanings and views language as a social construction. The primary data collection strategy was recorded dialogue. My study focused on interpretation and the meaning derived by and through my conversation partners. Where discourse analysis is concerned with the breaking down into units, this study was interested in the essence or wholeness of the meaning making process. Biography / autobiography /life stories seek to report on and document the history of a person's life. The intent of this study was to capture the stories of a selected group based on how they experienced a particular story, not to document any one person's life. Though Ms. Southgate's story is grounded in a significant historical time, this study was not framed as

an historical one because there would be too much reliance on secondary sources and it would not speak to present-day experience.

In the approach used, I attempted to make sense of the complexity, dynamics and subtlety of a story and the storytelling process through the experiences of a selected group of story listeners. The research included interpretative descriptive practices, interviews, orally told stories, field notes and was framed by the phenomenological lens. I brought a hermeneutic orientation to this work which was influenced by certain scholars and theorists; namely, Bontekoe (2000), Hans–Georg Gadamer, author of *Truth and Method* (1960), the single most important work in the field of hermeneutics, Boje (2001), Polkinghorne (1988) and Paul Ricoeur, who is widely recognized as one of the most distinguished philosophers of our time.

> For Gadamer, hermeneutics describes the way in which human beings come to terms with themselves, each other, and the world in practice…We all find ourselves born into a specific family at a certain place and time that we did not choose. As a people, we are shaped by past events and the cumulative interpretation of their meaning we call our tradition. In order to understand our situation, we need to acquire knowledge of this tradition. (Dostal, 2002, p. 205).

Since we are limited by our present understanding of the world in which we live, it requires more than a backward glance into this tradition. We must view the past on its own terms, knowing that we cannot change the past but we can change the way we interpret its meaning. “For that we need to be brought up short by a perception of the fact that other people at other times saw things fundamentally differently” (p. 205). This is

what Joan Southgate offered through her story. “To expand our horizon, we must not only identify the way in which things from the past are different; we also have to ask how they can be combined with or otherwise affect our current understanding” (p. 206). This is what Gadamer calls fusing horizons. Believing that there is no single or all encompassing viewpoint of slavery, Ms. Southgate refuted the notion of a grand narrative, a story of weakness, shame, and inability of African slaves, challenged the truth of our current conceptions and argued for an affirming interpretation.

In *Dimensions of the Hermeneutic Circle*, Bontekoe (2000) provides a comprehensive overview on hermeneutics, the theory of interpretation. He focuses on the structure of the hermeneutic circle which posits that: 1) “all human understanding, by virtue of its occurring in time, is hermeneutically circular” (p. 2) and 2) hermeneutical inquiry has no natural resting place, no place at which it can suspend its operations with a sense of the job well and thoroughly done” (p. 10). I wanted to learn what an experience meant for the persons who had the experience of hearing Joan Southgate’s story. From their comprehensive description of the experience, I sought to uncover the meaning behind the experience – the hermeneutic orientation. The scope of this study was to increase understanding and learn how we can use applied storytelling for a social movement.

Convinced in the soundness of Paul Ricoeur’s position, as noted in Chapter 2, that the proper study of human reality combines phenomenological description with hermeneutic interpretation, I selected portraiture (Lawrence-Lightfoot &Davis, 1997) for my research approach. In brief, portraiture relies on intensive interviewing, observation and artifact gathering.

Why Portraiture

The beliefs connected to qualitative research include the following, all of which bore weight on my qualitative design and the selection of portraiture as my research approach. The importance of voice in using a personal style of writing to convey the richness and depth of human experience involves:

- The inclusion of multiple perspectives
- The assertion that knowledge is made, not simply discovered
- The primacy of experience, applying to both researcher and researcher participants, which states that observation and making meaning of events is influenced by life experience
- Understanding as holistic where the gestalt or the whole is greater than the sum of the parts (Retrieved July 2, 2004 from http://www.cedu.niu.edu/~sorensen/502/powerpoint/topicD/qlnotes.htm).

Boje (2001) offers a novel way to explore gaps excluded in traditional narrative analysis, where narrative requires plot and coherence. In his view "to translate story into narrative is to impose counterfeit coherence and order on otherwise fragmented and multi-layered experiences of desire" (p. 2). His methodology, called antenarrative, embraces story that is non-linear, multi-voiced, incoherent, and unplotted storytelling.

This description of antenarrative paralleled with the journey of Joan Southgate's story, which was non-linear and multi-voiced, and had relevance for how I, as a researcher, interpreted those stories. Portraiture, as a research approach, respects these voices. Rather than impose coherence and order on their stories, I sought to uncover meaning by allowing the stories and my conversation partners to speak for themselves.

As a phenomenologist, I detailed the individual statements of informants about experiences with the phenomenon (the story and storyteller), then departed from the

phenomenological stance of moving to meanings and clusters of meanings to phenomenology as hermeneutical, letting things become manifest as what they are, without forcing categories on them. Polkinghorne (1989, p. 44) would deem this appropriate where "researchers are expected to develop plans of study especially suited to understanding the particular experiential phenomenon that is the object of their study (as cited in Creswell, 1998, p. 54). Storytelling is a collaborative process. How we come to know what we know is always in relation to others and the world.

Because story, as no other verbal communication tool, has the ability to capture emotion and reason, hearts and minds, it was most appropriate that I selected a research methodology, portraiture, that was equally boundary crossing.

> In defining concepts and describing methods of portraiture, we navigate borders that typically separate disciplines, purposes, and audiences in the social sciences – bridging aesthetics and empiricism, *appealing to intellect and emotion*, seeking to inform and inspire, and joining the endeavors of documentation, interpretation, and intervention (Lawrence-Lightfoot & Davis, 1997, p. xvi).

The goal of portraiture is to paint a vivid portrait or story that reflects meaning from the perspective of both participants and researcher. The primary data collection strategy included in-depth interviewing where a personal relationship between the researcher and the participants was developed. Beyond the boundary crossing characteristic of this approach, there were three additional reasons why I selected portraiture.

First, the methodology seeks to illuminate the complex dimensions of goodness.

> Portraiture resists this tradition-laden effort (dominant canons and preoccupation of social science) to document failure. It is an intentionally generous and eclectic process that begins by searching for what is good and healthy and assumes that the expression of goodness will always be laced with imperfections (p. 9).

This search for goodness is associated with both appreciative inquiry and generative theory. Both influenced my own thinking on the concept of meaning making and were used most often in the storytelling studies I examined. Further, the goal of Joan Southgate's journey, to honor her ancestors and praise the freedom seeking efforts of runaway slaves, conductors and the families of both, was a search for goodness.

Second, in Lightfoot's description on how this methodology was developed, she notes: "I knew these would be documents of inquiry and intervention, hopefully leading toward new understandings and insights, as well as instigating change" (p. 5). Knowledge for the sake of knowledge is good and healthy when it increases our understanding. Yet, as a reflective practitioner, I was keenly interested in learning how we could apply this new found understanding to effect positive change. Lightfoot's approach held promise for those results and was in concert with Joan Southgate's efforts in promoting positive change in our communities.

The third reason rested on an evaluative essay of the approach. Joseph Featherstone (1989) "calls this a people's scholarship – a scholarship in which scientific facts gathered in the field give voice to a people's experience" (as cited in Lightfoot, 1997, p. 10). The grand tour question, my foreshadowed question discussed in Chapter 1 asked: What is the impact of story on the listeners and why do they react the way they do? And, it was closely followed by the sub-question: How can we, as business or

community leaders, better connect with those we'd like to influence in some way? I could think of no better way to study these questions than to use an approach that embraced and connected people in community with one another.

Principles of Portraiture & Essentialist Portraiture

"Portraitists seek to record and interpret the perspectives and experiences of the people they are studying, documenting their voices and their visions – their authority, knowledge and wisdom" (Lawrence-Lightfoot & Davis, 1997, p. xv). There are four primary principles of portraiture. The first is that "portraits are shaped through dialogue between the portraitist and the subject" (p. 3). "The encounter between the two is … crucial to the success and authenticity of the rendered piece" (p. 3). The portraitist must engage in and embrace a relationship with the conversation partner.

One of the distinguishing characteristics of essentialist portraiture, as developed by Klaus Witz (Zhang & Witz, 2005), is understanding participants' feelings, state of mind, and consciousness. In this regard Witz also sees dialogue and relationship as key where "the researcher should consider participants as co-explorers and co-contemplators of the research" (Zhang & Witz, 2005, p. 2). The relationship is, as he suggests, like having a heart to heart conversation with a friend.

A second principle of portraiture is that "the narrative documents human behavior and experience in context" (Lawrence-Lightfoot & Davis, 1997, p. 11). The narrative is "always embedded in a particular context, including physical settings, cultural rituals, norms, and values, and historical periods" (p. 12). Just as the researcher brings her own personal history into the relationship and therefore must bracket that knowledge for its influence on the interpretation of data, the researched bring their personal histories that

are sure to bear weight upon the telling of their stories. Through dialogue and the relationship, "the researcher helps the reader to see deeper, higher aspects of the individual and/or of the phenomena … that may not be obvious, clear, or even seen by the reader" (Zhang & Witz, 2005, p. 7).

Gadamer, on hermeneutics (as cited in Bontekoe 2000), states that our first responsibility as listeners "is to attend to the content of his [the speaker] speech so as to gain the benefit of his insight" (p. 99). He asserts that reading a text is very much like having a conversation. The reader speaks to the text when asking what does the text mean, given the subject matter and specific words used. The text, as in a conversation, is assessed along the lines of reasonableness. It is "both the act of interpretation and the convergence of insight on the part of the reader and the text" (p. 103). As a researcher, I was careful in being attentive to the stories and on how I interpreted the data, acknowledging that it was dependent upon my own prior understanding of the subject matter. Gadamer states that context and relationships have an undeniable role to play in determining meaning.

> "Thus the full meaning of the artwork, poem, or historical event, according to Gadamer, is always still in the process of being determined, as the perpetual unfolding of history establishes new contexts in the light of which it can be interpreted" (p. 103-104).

The third principle of portraiture "assumes that the…qualities – of strength, health, and productivity – will always be imbued with flaws, weaknesses, and inconsistencies…" (Lawrence-Lightfoot & Davis, 1997, p. 142). Rather than focusing on

what's wrong, the portraitist asks: "What is happening here, what is working, and why?" (p. 142). In seeking the goodness, the portraitist does not impose her definition of "good" on the inquiry or assume that there is a singular definition shared by all" (p. 9). Here again, this principle resonates with Witz's point on understanding participants' feelings, state of mind, and consciousness. To sustain a high motivation and commitment to the research, according to Witz, the "researcher should have a strong belief that the study will contribute to society and/or to a better understanding of the nature of human beings (Zhang & Witz, 2005, p. 2). Both approaches, portraiture and essentialist portraiture, call for a research process that is positive and affirming.

The fourth principle of portraiture rests on its dual characteristic of being both inquiry and intervention. "In the process of creating portraits, we enter people's lives, build relationships, engage in discourse, make an imprint … and leave" (Lawrence-Lightfoot & Davis, 1997, p. 11). With intent, we seek to engage individual capacity for in-depth conversation about things that matter. We strive to do no harm and leave our conversation partners with a sense of being heard and valued. With essentialist portraiture, "the participants are given tremendous freedom to bring and develop topics during the interview and feel that they are genuinely accepted and respected" (Zhang & Witz, 2005, p. 4). Where relationship is at the center of portraiture, essentialist portraiture offers "a unique way of conducting interviews" emphasizing the deep connection between the researcher and the participant (p. 6).

The Research Design

My work began with conversations with the chosen participants. We discussed their experiences with Joan Southgate and their reflections on her story and their involvement with her journey. My intention in participating in this process was my belief that through this process some previously hidden understandings would be revealed.

Potential Benefits to the Participants

It was hoped that the participants would benefit from the research because a greater understanding of their experience would enable them to share their stories with greater clarity and to a wider audience. The possible harm would be that persons would be offended if they were identifiably portrayed in a less than flattering way. All measures were taken to protect the participants from identification with such offensive materials. Every effort was made to report findings only with the permission of the participants and in a way that they would not be identified. I received permission from all participants to use their name in concert with our conversations.

I also reminded participants that in the telling of their stories, they would not only enable me to understand their experiences and communicate it to others, but they themselves could come to a greater understanding of their experiences. It could also be possible that the stories may lead to benefit other storyteller leaders who are trying to effect positive change in their communities.

With each participant, I reviewed the issue of confidentiality, asked them to identify any elements where they felt vulnerable and offered to use pseudonyms to protect their identity.

Research Population

I interviewed six members of the Lake Erie Travelers group who traveled with Ms. Southgate on her last leg of the journey from Ohio into Canada. Lake Erie Travelers began as an idea in August, 1996 when several camping families gathered in Dayton, Ohio decided to try and organize their own local club in the Cleveland area. Seven families attended the initial meeting in the fall of 1996. During the winter of 1996 and spring of 1997, more families became involved and Lake Erie Travelers was born. They then became affiliated with the National African-American RVer's Association Inc. (NAARVA). The purpose of both clubs coincide and that is to bring recreational vehicle owners together for camping excursions; to promote good wholesome fellowship, fun, and recreation; to unite as one; and to share camping experiences.

Seven families chose to travel with and offer use of their recreational vehicles to Joan Southgate. Therefore, the maximum number of possible participants who could grant me the honor of talking with them was 14. All, but two, who are White, are African-Americans and all are married couples. Every effort was made to keep the research approach accessible to the participants. I was careful to not ignore the possibility of a negative reaction from some potential participants. Having gone through a similar experience with an organizational change project in an African-American community, I recognized the ill feelings that some African-Americans held for research of any kind. This distrust can be traced back to the United States Public Health Service Study of Syphilis – better known as the Tuskegee Experiment (Retrieved March 27, 2005 from http://archive.blackvoices.com/columns/cobb/ht20040217/ghosts.asp).

Research Questions

The specific questions I developed were to be used to initiate conversation with my partners. They were designed to serve as a guide for our conversations.

When did you first meet Joan?

When did you first hear Joan's story? Tell me about that.

What was that experience like?

How did you come to accompany Joan on the last leg of her trip?

What was that experience like (accompanying Joan on the last leg of her trip)? However, and as I described in the next chapter, I quickly learned from my pilot study that the script developed for setting the stage for the conversational interview was better suited, that is more open-ended, for engaging others in dialogue.

I am interested, as you know, in the impact of story on the listeners and why they react the way they do. I will ask you to tell your story about first meeting Joan Southgate, about your experience in first hearing her story and your decision to accompany her on the last leg of her trip.

Research Entrée

One of the pilot participants is a long-time friend and neighbor. We also serve together as elected councilpersons to the city in which we live. He invited me to his home on the afternoon where Joan Southgate was meeting with a couple of the RVers to plan the trip. It was then that I first met Ms. Southgate. Months later when I told him of my desire to interview those who traveled with Ms. Southgate, he was eager to support my efforts. He recommended that I attend one of the RVers regular club meetings, held on the first Thursday of every month, to introduce myself and explain my doctoral studies.

His advice was based on the importance of building relationships. My plan was to explain the purpose of my research, distribute the cover letter and informed consent form, and ask them for the honor of their participation. As I describe in Chapter 4, this meeting occurred earlier than originally planned.

The Research Activities

A limitation to this research approach was addressed and examined through what Lightfoot describes as an early self-reflective, self-critical exercise that increases consciousness about the lens the portraitist brings to the field. This exercise in tracking possible areas of bias was completed in Chapter 1, situating the researcher within the exemplar story. It allowed the researcher to open her eyes as well as her mind and heart to record the reality she encountered while conducting the study.

Data Collection

I interviewed each participant using the portraiture approach of asking them to tell a story of their experience. I taped the interviews and then transcribed them, and analyzed the stories with emergent themes. Additionally, all interviews were video recorded except one because we met in a public fast-food restaurant. I then met with the participants individually to discuss the findings. I stored audio and videotapes in a locked file cabinet and will destroy them one year after my dissertation is completed. I stored the Informed Consent forms in another locked file in my home work office.

I kept a journal to record new ideas, questions regarding the process, revelations and insights. It was important to record my daily reflections in field notes to capture my thoughts and my feelings concerning the events of the day, to develop more discerning

questions, and stay focused in my inquiry. As noted earlier, portraiture depends, not only on intensive interviewing, but on observation and artifact gathering as well. I considered what was said and not said but inferred through their actions and behaviors during the interview. I paid attention to verbal and nonverbal behavior such as the look of the eye, the intonation of the voice, the way the body was held, the import of a subtle pause as they made a significant contribution to the meaning of a story. My data collection included documents such as newspaper articles, personal memory, photographs, video recordings, and other sources as appropriate.

Data Analysis

Audiotapes were transcribed, read and re-read. I viewed and re-viewed the video recordings and was able to more completely write the transcription. I selected themes that pertained to the research questions as well as any that emerged from the conversations. These transcripts were shared with the participants, allowing them to check for factual accuracy. I extended them the opportunity to comment, revise or correct any portion of the interview. I also honored any request to remove text that did not honor their true feelings and thoughts or, in their opinion, represented them in an unflattering manner. None of the participants requested edits.

Following this review, I re-read the approved transcripts and reflected on them. There are several modes of analysis in portraiture (Lawrence-Lightfoot & Davis, 1997, p. 214). The first identified the visible and audible refrains spoken over and over again in various contexts. Themes were also heard or seen in the rituals and ceremonies that symbolized what the researched values. By triangulating data from a variety of sources, emergent themes were uncovered. I also looked for other patterns that emanated from

discovering order in the chaos, reflecting on the dissonant strains, and through finding the coherence in what seemed unclear and scattered to the participants during the interviews.

To write the portrait is to construct the aesthetic whole (Lawrence-Lightfoot & Davis, 1997, p. 259). First, I identified the overarching gestalt, the big story that framed, focused, and energized the narrative. Next, I identified subheadings that reflected the emergent themes. Third I created the flow of the narrative and finally, developed unity through sequencing – the beginning, middle and end of the story.

The portraitist seeks resonance in the written portrait from three perspectives: the participant, other readers and the portraitist herself. This is explained in the next section. To assist in reviewing the portrait with the participant and in determining whether the portrait reflected what the participant experienced, I used a post interview questionnaire with each participant. (See Appendix A).

Criteria for Assessing Trustworthiness

Lincoln (1995) wrote that the criteria for judging the quality of interpretive research are even more fluid and emergent than the boundaries of interpretive research itself. It is scientific inquiry that embraces commitments to: 1) new and emergent relations with respondents; 2) a set of stances - professional, personal, and political - toward the uses of inquiry and toward its ability to foster action; and 3) a vision of research that enables and promotes social justice, community, diversity, civic discourse, and caring (pp. 277-278). These commitments are descriptive of portraiture. These vivid written portraits are “documents of inquiry and intervention, hopefully leading toward new understandings and insights, as well as instigating change” (Lawrence-Lightfoot & Davis, 1997, p. 5).

The portraitist's standard is one of authenticity and this occurs when there is resonance from three perspectives. First, the participants or conversation partners should be able to see themselves reflected in the story. The portrait may hold images they are not used to seeing; that are not appealing; and sometimes shocking. But after the shock wears off, there is a "click of recognition" (Lawrence-Lightfoot & Davis, 1997, p. 247). The portrait reveals their essence of being and is believable.

Second, the readers or the audience will see no reason to disbelieve the story. Enough information is provided as adequate evidence of the reasonableness of the links between the data and the conclusions. The portraitist provides information on what the interviewers actually said and the context in which they said it to allow others to see that the conclusions make sense and are transferable. In this study, member checking occurred at two levels: the transcribed interviews and the written narrative.

Third, the portraitist, having "a deep knowledge of the setting and a self-critical stance," will see the truth value in her work (Lawrence-Lightfoot & Davis, 1997, p. 247). Truth value means do the findings of the study make sense and are they credible. The portraitist conducts a self-reflective, self-critical analysis; and keeps and periodically reviews her field notes. Eisner (as cited in Lawrence-Lightfoot & Davis, 1997, p. 245) argues that validity hinges on two processes, structural corroboration and referential adequacy. He emphasizes the researcher's goal of finding corroboration among the pieces of the puzzle. My puzzle pieces included newspaper articles, personal memory, photographs, video recordings, and other sources as appropriate. "Evidence is structurally corroborative when pieces of evidence validate each other, the story holds up, the pieces fit, it makes sense, the facts are consistent" (Eisner, 1986, p. 241).

"Referential adequacy depends, in part, on the expertise of the researcher, and on her familiarity with the setting being studied" (Lawrence-Lightfoot & Davis, 1997, p. 246). In this study, referential adequacy, which is the testing of criticism by checking the relationship between what the critic has to say and the subject matter of his or her criticism, occurred through member checking and the readers.

Summary

This part of the document provided a description of the research approach I used. It reviewed the beliefs and rationale for selecting portraiture, the principles of portraiture and aspects of essentialist portraiture, the research design and activities, and criteria for assessing the trustworthiness of the research. It described data collection and data analysis activities. Chapter Four presents the data and findings from the pilot study. Chapter Five presents the data and findings from the main study, inclusive of the two pilot interviews, integrated into portraits. Finally, Chapter Six discusses the implications of what was revealed and suggests possibilities for further inquiry.

CHAPTER 4

IV. THE PILOT STUDY: THE JOURNEY BEGINS

First we see the hills in the painting, then we see the painting in the hills.
Li Li Weng

Introduction

Pilot studies are conducted for a range of different reasons. I conducted this pilot study in order to: 1) collect preliminary data; 2) assess the proposed interviewing questions to uncover potential problems; 3) establish whether the interviewing technique is effective. Teijlingen and Hundley (2001) "argue that researchers have an ethical obligation to make the best use of their research experience by reporting issues arising from all parts of the study, including the pilot phase" (p. 4). The pilot description is purposefully detailed to disclose, not just learnings and insights, but underlying awareness and intentions that might otherwise be hidden elements. I intend to use all of my pilot data as part of the main study.

The journey begins in this chapter by describing the following: 1) the research entrée, 2) the research activities; and 3) the interviews and storytelling process. After each section, I will write about my reflections as noted in my field notes.

The Research Entree

The Monthly Meeting

As mentioned in Chapter 3, my plan was to attend one of the monthly RVers club meetings to: 1) introduce and in a few cases re-introduce myself; 2) explain the purpose of my research; 3) ask them for the honor of their participation; and 4) distribute the

cover letter and possibly the informed consent form. This plan was a component of the main study and, with the exception of steps 3 and 4, not considered for the pilot study. During casual conversation I asked Philip "Phil" Saunders whether he was willing to participate in the pilot. He wholeheartedly agreed. My thoughts were that I would personally deliver the cover letter and informed consent form to him and proceed from that point.

On June 9, 2005 while attending a local community-sponsored event, Phil mentioned that later that evening the RVers would be holding their monthly meeting and it would be an excellent idea for me to attend and introduce myself now, advising them that I would return for their September meeting. There was no reason for me to not agree.

The meeting was being held in the familiar surroundings of Bedford Heights city hall where as councilpersons, both Phil and I spend many countless hours. As I made my way to the downstairs meeting room, I had only to follow the sound of animated voices and the smell of fresh coffee to find the Lake Erie Travelers. Phil introduced me to the president, explaining that I was a doctoral student interested in Joan Southgate's story and asked permission for me to speak to the club for a few moments. The president, whom I remembered from Joan Southgate's storytelling session in Bedford Heights in February 2004, smiled and remarked: "I guess we'll always be a part of Joan Southgate."

As late arrivals made their greetings, the sergeant of arms called the meeting to order. I sensed that they are a fun loving group but serious about club business. Within minutes, the president called Phil to the front of the room to introduce me as the guest speaker. There were familiar and unfamiliar faces in the audience. Because I knew that

Phil was a long-time member and well liked, I started with a little humor at Phil's expense.

Once the laughter died down, I thanked them for allowing me time on their agenda and proceeded to share my thoughts and feelings about Joan Southgate, her journey and my admiration for those RVers who chose to accompany her on this history-making event. I mentioned that I would be conducting a pilot study during the month of June that included interviewing two people. I told them that I would be back in September asking those who had traveled with Ms. Southgate to consider talking with me about their experience. Since I would be interviewing Phil, I encouraged them to talk to him about his interviewing experience with me. I thanked them for allowing me time to speak.

Reflections

I found it beneficial to be asked on the spur of the moment to speak at the RVers monthly club meeting. Though I'm comfortable in speaking before small and large groups, I found myself becoming apprehensive about whether I'd say or do the right things. This was my first public forum for discussing my doctoral studies and it was important that my entrée be respectful of their time, attention, and consideration. Using humor turned out to be a great way to break the ice. The club members were warm and friendly.

The Research Activities

Covering the Basics

The next day, June 10, 2005, I delivered the cover letter and informed consent form to Phil at his home. We read the cover letter together and I left both letter and consent form with him to re-read and read, respectively, sign and return to me. The following Tuesday, June 14th, Phil returned the signed documents and scheduled June 18, 2005 for the interview.

The second individual that I considered for the pilot is a friendly neighbor. I stopped by his home to ask for his participation and to deliver the cover letter and informed consent form. I felt resistance. His body stance was not inviting but guarded. So I immediately clarified that I was not there to interview on that day but would schedule a convenient time later. He responded that he didn't know what he remembered and that he would be going out of town shortly and therefore not available until July. At that point, I informed him that I still wanted to interview him but perhaps it would be better to wait until later in the year since I needed to complete the pilot study in June. As I left, he stated that he would let me know whether he could be available in June. As I settled in my car for the drive home, I decided to ask another individual to participate in the pilot. Two days later I arrived home from work to find that both of the documents had been dropped off, signed but left with no message.

The third individual, the second pilot participant, approached was Ruth "Cindy" Saunders, Phil's wife. I delivered the cover letter and informed consent form to her home.

The documents were signed and returned by Phil during one of our city council meetings. I called Cindy and scheduled the interview for June 24, 2005.

Reflections

With the second individual, perhaps we were both caught off guard. He, because of his uncertainty about the interview and assumption that I was requesting interview time at that moment and I because of his statement that he didn't know what he remembered. My intuitive sense said that now – the month of June - was not the right time to interview him.

Of the 14 possible conversation partners, four are neighbors, people that I've known for over ten years. And though I know that not everyone may want to participate, I was surprised to get this reaction from one of my neighbors. This is an insight that I must not lose sight of as I start the main study.

Data Collection: The Storytelling Process

I separately interviewed Phil and Cindy using the portraiture approach of asking them to tell a story of their experience. The following script was used with both and required no further prompting for us to initially engage in dialogue.

> I am interested, as you know, in the impact of story on the listeners and why they react the way they do. I will ask you to tell your story about first meeting Joan Southgate, about your experience in first hearing her story and your decision to accompany her on the last leg of her trip.

Since I was interested in their feelings and insights, I would follow a question on experience by saying: “What struck you? What do you remember about …? How did you feel?

Before the storytelling process began with Phil, he shared many articles, newspaper clippings, videotapes, etc. that he felt would be important for me to review as part of my studies. All of these artifacts have become part of my data collection.

The interviews were audio and video taped. I had not planned to videotape but did ask and was granted permission to do so. Phil jokingly remarked that he wanted to change his shirt. Cindy removed her hair rollers before we started. I reassured them both that the videotape was for my own learning. I wanted to be able to review their facial and bodily expressions to determine whether I was able to pick up on nonverbal cues. Did I allow for silence when my conversation partner wanted to ponder a thought? Did I pick up on the intonation of the voice when a word or phrase was uttered? Viewing the videotape would answer these and other questions.

Because Phil loves to talk, having a conversation with him was easy. It took little prompting on my part to talk about his experiences. Cindy, on the other hand, is more reserved and quiet by nature. She wondered whether I was looking for certain answers. I tried to put her at ease by saying that there were no right or wrong answers but only her experiences that she was sharing. At the conclusion of both interviews, I reiterated that the next step would give them the opportunity to review and check for accuracy the transcribed interview.

Reflections

Because I've known Phil and Cindy for many years, a tone of safety, respect and trust was set at the beginning of our process together. We discussed and agreed how we would proceed. I found that in using the videotape, I set an intention for myself to tune in completely to the story. I allowed myself to be guided by the process, though, at times, I did not feel completely present. Was the tape recording? Was the tape distracting to Phil or Cindy? I had promised that the interview would last about an hour. How long had we been talking? Am I taking too much time? While interviewing Cindy, she leaned over and took the interview script out of my hand. As she continued to talk and even though I never read from the script, my mind wondered: Am I asking all of my questions?

At other times, I was completely caught up in a story. When emotions took over, I could feel the water in my eyes. Independently we experienced resonance. We were able to confirm our attunement with a particular topic by a nod of the head, a smile and ah ha. When our resonances were not shared, the information was equally telling. At the end of each interview, I felt energized. As I drove home, I felt uplifted.

Data Analysis: Transcribing the Tape

Audiotapes were transcribed, read and re-read. I will select themes that pertain to the research questions as well as any that may emerge from the conversations. These transcripts will be shared, individually, with Phil and Cindy, allowing them to check for factual accuracy. I will extend them the opportunity to comment, revise or correct any portion of the interview. I will also honor any request to remove text that does not honor their true feelings and thoughts or, in their opinion, represents them in an unflattering

manner. Following their review, I will re-read the approved transcripts and reflect on them.

I have not collected enough data to begin constructing the aesthetic whole. It is too soon to know whether the big story, that will frame, focus, and energize the narrative, is embedded within these two interviews. But there were recurrent refrains. Both Phil and Cindy described Joan Southgate's journey as a "reenactment" and both, in sharing personal background information, discussed the influence of growing up in the south.

Revelations and Insights

Levels of Resistance

As I approach each RVer with a request to interview and whenever this request is met with resistance, I need to carefully assess what's going on. Rick Maurer, an Arlington, Virginia-based advisor to individuals and organizations and a graduate of the Gestalt Institute in Cleveland, Ohio offers a model on the three levels of resistance that I have found useful. Using the second individual that I contacted for the pilot, the resulting assessment is as follows:

> Level 1 – I don't get it. I was not as clear as I could have been concerning the facts of the pilot study.
>
> Level 2 – I don't like it. His emotional reaction could have been in response to the idea of interviewing or the subject of the interview.
>
> Level 3 – I don't like you. This is the most difficult level of resistance. As the researcher, I need to step outside myself and see what others see.

Given the three levels and my knowledge of this particular individual, resistance occurred at either level 1 or 2 or both.

Setting the Tone

I was comfortable with my pilot participants and they with me. However, I did not have established relationships with the majority of possible participants. Therefore, I had to work harder at developing intimate relationships and safe containers where participants were willing to engage in dialogue. Ensuring that my conversation partners were comfortable, not only with me, but also with the integrity of the process, required that I address the confidentiality issues as often as necessary and prior to the sharing of their stories. I reminded them that my purpose was to witness their stories, to hear their voices and that our work together would be a true collaboration where we freely exchanged ideas and thoughts.

Summary

This part of the document provided a detailed description of the pilot study. Completing a pilot study successfully was not a guarantee of the success of the full-scale study but the experience proved a useful guide for designing the main study. I collected preliminary data; confirmed interviewing questions; and gained insight into improving the storytelling process. Chapter Five presents the data and findings from the main study as integrated into portraits. Finally, Chapter Six discusses the implications of what was revealed and suggests possibilities for further inquiry.

CHAPTER V

V. FINDINGS AND PORTRAITS: THE SOUL'S SEARCH FOR MEANING

> And the truth of your experience can only come through in your own voice.
> - Anne Lamott, *Bird by Bird*

Introduction

The journey continues in this chapter with the following: 1) a personal experience in and reflections from walking the Underground Railroad in Bath, Ohio, 2) individual portraits that give voice to each story of my conversation partners, and 3) a conversation with Joan Southgate on why she made the journey and what she hoped to achieve. This last section incorporates the reflections and thoughts of my conversation partners' experience with Ms. Southgate.

Just as an infant finds total delight and amazement upon realizing the sound of her voice, as older human beings we revel in finding and using our voice. As Covey (2004) explains:

> Voice lies at the nexus of talent (your natural gifts and strengths), passion (those things that naturally energize, excite, motivate and inspire you), need (including what the world needs enough to pay you for), and conscience (that still, small voice within that assures you of what is right and that prompts you to actually do it) (p. 5).

The underlying principles of goodness inform the voices of each of my conversation partners. "It is the voice of the human spirit – full of hope and intelligence, resilient by nature, boundless in its potential to serve the common good" (Covey, 2004, p. 5). Early in the third chapter of his latest book, *The 8th Habit*, Stephen Covey expresses his belief that "deep within each one of us there is a longing to live a life of greatness and contribution – to really matter, to really make a difference" (p. 28). Once the decision is

made to live a life of difference – "at home, at work and in the community" (p. 29) – the journey involves discovering your voice and expressing your voice. The six members of the Lake Erie Travelers club that I had the privilege of interviewing have all made choices to live a life of real contribution and significance. They engage in work (professional, community, family) that meets one or more of the universal human needs – "to live (survival), to love (relationships), to learn (growth and development), and to leave a legacy (meaning and contribution)" (p. 22).

Philip Saunders, my first conversation partner, has dedicated his life to serving others, for the last several years as an elected councilman in the city of Bedford Heights, Ohio. He strives to make a difference in the lives for every city resident, young and old. My second interview was with Cindy Saunders, Phil's wife, who has retired but not slowed down as she works with multi-handicapped (physical and mental) children, her "special children" as she endearingly calls them, in the local school system. Bob and Karen Pallat were my third and fourth interviews, respectively. Both partners in this marriage are career naval non-commissioned officers who have shown equal commitment to work and play, by volunteering in their neighborhood, with the homeowners' organization and as active participating members of the RVers club. In fact, the first meeting of the Lake Erie Travelers club, which is also affiliated with the National African-American RVer's Association, Inc. (NAARVA), was held at the home of the Pallats in Bedford Heights, Ohio in the fall of 1966. My fifth conversation partner, Howard Gregory, in spiritual partnership with his wife, Juwanna, has opened both home and heart to children needing to be loved and cared for. The sixth interview was held with Earl Carrington, who holds the distinct honor of being the one who introduced the club to

Joan Southgate. In one talk with Cindy Saunders about the RVers, she remarked: “Oh, Earl, he’s a sweetheart.” He’s also the husband, father, friend, and fellow camper that others speak about with high regard and respect.

In one sense, it is not all that unusual that these RVers chose to travel with Joan Southgate. The purpose of their club is: 1) to bring recreational vehicle owners together for camping excursions, 2) to promote good wholesome fellowship, fun, and recreation and 3) to unite as one and to share camping experiences. At the same time and for each, the decision to accompany Ms. Southgate on the last leg of her journey was in response to the small, yet significant, voice that each heard in his or her own unique, personal way.

Portraitist's Perspective

"Voice is unique personal significance – significance that is revealed as we face our greatest challenges and which makes us equal to them" (Covey, 2004, p. 5). Though I could not accompany Ms. Southgate on the last leg of her journey, I was presented an opportunity to experience the Underground Railroad and reflect on its personal meaning. My husband and I participated in a 1.5 mile lantern hike meant to simulate the trek of the Underground Railroad. Sponsored by the National Park Service & the Cuyahoga Valley Scenic Railroad, we arrived at Hale Farm in Bath, Ohio, around 7 p.m. on November 12, 2005. It was a chilly, dark night.

Looking Back, Moving Forward

We arrived early to check in and discovered that the assembled crowd was the 7:00 p.m. group. So we went back to the coziness of our car, anxiously awaiting our start time of 7:30 p.m. I noticed that there were very few people of color in the gathering. I didn't stop to question why I was looking for them. Perhaps two people of color were part of the earlier group, where there were five total in ours. As we set off on our hike, I noticed a few people of color in the midst of the 8:00 p.m. group.

Our only light was from lanterns held by our three or four guides. We were led by one very tall and forceful-speaking man who demanded that we turn all cell phones off or put them on vibrate. "It is so very rude to have cell phones ringing while we're walking. You are runaway slaves and called cargo. On this journey, we're never sure who is truly supportive or just trying to recapture runaways. The code words as we pass from one conductor to the next are: I'm a friend of a friend. The code name for Cleveland is Hope.

The code name for Canada is Caanan. When the slave catchers are in the area we'll say that the wind is blowing from the South. When you hear that, run for cover. Keep close together and stay quiet. Are there any questions?"

There were none and so our journey began. At first, my husband and I simply walked side by side in silence. My eyes were focused on whoever happened to be walking in front or right beside me. The entire group was silent. If there were whispers, I couldn't hear them. I was aware of the stillness in the night air, the clearness of the sky as we gazed upward looking for the North star, the chill of both the season and the unfamiliar, our environs, the sound of our feet upon the ground and the periodic train whistle somewhere off in the distance. Freedom seekers learned how to tell direction from reading the stars in the night sky. Tonight would have been a good night for keeping on track. The stars were as bright as diamonds. Along the way, we stopped, not so much for a rest, but to listen to vignettes re-enacted by volunteer actors. At our first stop and at the conclusion of the walk, we were asked the same question: "Could you do it? Could you leave all that you hate – the bondage and the cruelty - and all that you love – your family, your children, your home – to seek freedom?"

We walked. We ran. We cowered in the brush and shrubbery of wooded areas, hoping to remain hidden from the slave catchers' eyes. I was cold so clung tighter (for warmth and support) to my husband's hand. As the walk progressed, my body warmed, but only to be replaced with the discomfort of hunger pains. I was tired and my legs ached from bending, stooping low to the ground for cover, and the pacing of the walk. How much longer, I wondered. An abolitionist farmer hid us in his barn. But we were caught and put on a train headed back South.

Maya Angelou has been quoted as saying: People will forget what you said. People will forget what you did. But they will never forget how you made them feel. I knew that I wouldn't remember everything an actor said. Nor would I have exact recall on every step of this walk. And though the feelings will be long remembered, I wanted and did capture my immediate reflections and feelings on audiotape once we were back and settled in the warmth of our car.

I remembered the code names and password. But my most poignant memory is when we were captured in the barn and forced to come outside. "I want all you bucks over here and wenches over here," screamed the slave catcher. I was forced to let go of my husband's hand, to move away from him. "Keep your eyes to the ground. Don't look at me." How heartrending to be torn from a loved one. The slave catchers' voices grew louder and angrier. I wanted to look up to search for my husband. But to do so, I'd risk having their fury directed towards me. "Get the shackles and leg irons. Line 'em up. Looks like we got some twofers in the bunch." Silently we fell into a single line and with heads bowed down walked in the direction of the train. We were caught and being returned down South.

Moments later my husband caught up with me. I hesitated – were the slave catchers watching – before grabbing his hand. We boarded the train. It's over, I thought. "Sit down!" screamed the slave catcher. I immediately took a seat, surprised by my own quick reaction to the demand. "Wanna know how close you came to freedom? You was 27 miles." I could only imagine how a twofer might feel, having tried to escape twice and come so near to Cleveland, to Hope, to freedom, only to be re-captured and returned to bondage.

Weeks later while reflecting on the stories of the Underground Railroad, I learned that "these escaping African Americans were called freedom seekers to reflect a freedom of spirit not found in terms such as runaways, fugitives or escapees" (Retrieved December 19, 2005 from http://www.cr.nps.gov/ugrr/learn_c.htm). With the first step taken on this perilous journey, they made a choice, arising from within the depths of their souls, used voice, and articulated it with their feet. Having found themselves in a space where they could not make a difference, they and they alone, took responsibility to use their feet and move to a place where they held hope for making a difference. I return to the same question with trepidation: How many of us would have chosen to seek freedom? More importantly, for what reason or reasons today would we take responsibility for choice and consequence? The stories of each of my conversation partners reveal where and how they acquired the wherewithal to find their voice and once found to articulate it.

The Need to Remember

Though "the origin of the term, Underground Railroad, cannot be determined, by the 1820s both those who aided freedom seekers and those who were outraged by the loss of their human property began to refer to freedom seekers as part of an underground railroad" (Retrieved December 1, 2005 from http://www.cr.nps.gov/ugrr/learn_b1.htm). This human train offered local aid, from one point to another, to persons held in bondage in North America to escape from slavery. Stations might be barns, cabins, basements or any other site that provided a safe haven for rest and food. Conductors would guide the freedom seekers to a safe station on the route North. But as Joan Southgate's story listeners would learn, freedom seekers were not safe, even in Northern abolitionist towns. For with the passage of the 1850 Fugitive Slave Law, the federal government:

> mandated citizen assistance to slavers, and allocated resources and men to insure the return of human property to the South. The accused had no right to a jury trial, and commissioners appointed to adjudicate these cases received higher compensation for finding in favor of the slaveholder (Retrieved December 1, 2005 from http://www.cr.nps.gov/ugrr/learn_b1.htm).

There are two reasons why we need to remember the history of slavery as told by Joan Southgate. First, as abolitionists and sympathizers, would we have been willing to break federal law to assist freedom seekers? In other words, with a similar or equally disparate challenge of today, requiring risk and/or sacrifice, would we have found our voice and be willing to exercise it? This is the question that must be answered individually and an answer that anyone who would want to lead needs to know. Second, slave owners portrayed African Americans as incapable of caring for themselves or organizing for the good of the community. The Underground Railroad refutes this claim as people from all walks of life assisted the freedom seekers and came together on issues of mutual concern. It's a lesson that should not be lost on today's challenges, whether they are of local, global, national or international affairs. For we as a people have the talent, the passion and the conscience to do what is right in creating our desired futures.

Organizing Framework

> The search for meaning is intrinsic to human nature. As thinking creatures, we want to understand why we find ourselves on this road and where this journey is taking us … we are wanderers, searching and striving for end and aim, for purpose and connection.
> - William J. Bennett, *The Moral Compass: Stories For A Life's Journey*.

My interest in exploring story and storytelling leadership is motivated by more than the personal affinity I hold for the sometimes intense passion and influence of stories and storytelling. I wanted to better understand, given that story listeners take only what they need from a story, how this elusive power of story and storytelling leadership could influence desired behavior change. The concept of connection – connecting to some one or some thing greater than self – emerged from the study and became the overarching theme of all six portraits. My conversation partners made connections at deep, personal levels and for different reasons.

I was drawn to the concept of connection because it holds importance for organizational and community change and leadership. At the Berkana Institute (www.Berkana.org), a leader is defined as "anyone who wants to help." My conversation partners are rich in leadership. Their search for meaning rested on interconnectedness, a word that captures the essence of spirit. Whereas you can't give what you don't have, each participant in the study embodied soulful things – connecting and making meaning through respectful relationships, good will, and hope. Palmer (2004) wrote that the soul wants to keep us connected and "persistently calls us back to our birthright form, back to lives that are grounded, connected, and whole" (p. 34).

As I met with each one and observed them in their natural surroundings of home, work, and/or play, it became clear that each was on a personal quest, a unique spiritual

and perpetual journey, for purpose in life. This quest, to meet one or more of the four "universal human needs – living, loving, learning and leaving a legacy" (Covey, 2004, p. 11), is portrayed in each portrait. Though these needs are not mutually exclusive, I sought, through each person's story, to focus on one particular aspect. As individuals, all have found their voice and are able to behaviorally articulate it in response to the question: What do you love doing? Collectively, they illustrate the diversity of the soul's search for meaning through connection. Following the portraits, I shared revelations from my interview with Joan Southgate and examined them against the reflective comments from my conversation partners on their experience with Ms. Southgate.

The first portrait is a story of one man's intense desire to be a part of something greater than himself and a need *to leave a legacy* that honors his fore parents. Shortly after his retirement as a probation officer, Philip "Phil" D. Saunders was first appointed to, and then elected three times as, councilman in Bedford Heights, Ohio. His campaign slogan is and has never changed from being: Committed to Community. In addition to finding what he loves doing in life, Phil was able to clarify what life is asking of him. His life's work is to fight for the right to freedom and choice and to do so in a way that is collaborative, peaceful and brings unity.

Ruth "Cindy" Saunders, Phil's wife, is also a retiree, having worked in social services for many years in Cleveland, Ohio. Cindy and Philip are the proud parents of two adult children and five grand-children. They also share a passion for traveling all over the country in their recreational vehicle. She, too, has found work, after retirement, that she loves doing and meets her need for showing deep respect and love for others. As a volunteer teacher's aide in the local public school system, she nurtures the growth of

mentally and physically handicapped children. Her portrait on what it means *to love* made clear that her depth of caring is as profound as the pain felt from memories awakened, but not forgotten, by her travels with Joan Southgate.

Robert "Bob" Pallat was enabled by his inner teacher to make connections to past experiences and previously unknown stories *to learn* more about himself and his place in the world. With 25 years as a police officer, over 10 years as a Deputy Baliff, and partly concurrent with his 26 years in the Navy, Bob learned to subdue his emotions most of the time, trying to stay focused and objective in order to come to a logical conclusion and/or goal. Though he relies heavily upon his thinking skills, in life "it's not an either-or. We have minds and hearts" (Kouzes & Posner, 1999, p. 12). His desire for making connections and for personal growth gave voice to his heart.

How could anything be more fun than to love what you do and feel that it matters? Karen Pallat, Bob's wife, retired with 25 years of service working for the Cuyahoga County Public Defender in Cleveland, Ohio. She has a secured sense of stability and consistency as manifested by her long term with one employer. Simultaneously and because she is still actively employed by the United States Naval Reserve, life provides variety and excitement through reserve assignments which have rarely taken her to the same place twice and through RV travel with her husband. Karen's portrait bore witness that *to live* fully is to also embrace emotional and educational experiences that raises one's level of awareness and capacity to recognize what is taken for granted in life and to connect with others who have had different experiences.

Grounded in a greater good beyond the self, valuing other people, and creating more depth and sensitivity is spirituality that expresses divine love. Howard Gregory's

portrait expresses that *to love* selflessly and unconditionally is at the core of our existence. Believing that we need each other and, in his view, that we connect through our spirit is paramount to human survival and the future of the world. As husband to Juwanna, father, grand-father, great-grandfather, and foster parent, Howard taps into this inner strength for a sense of purpose and meaning and was able, during the last leg of Ms. Southgate's journey, to make spiritual connections with the ancestors and descendants of Harriet Tubman.

When Stephen Covey stated: "Perhaps the most important vision of all is to develop a sense of self, a sense of your identity, a sense of your unique mission and role in life" (www.stephencovey.com/8thHabit/learnmore.html), he could have been talking about Earl Carrington. With remarkable clarity and observable inner peace, he has defined for himself what it means *to live*. Having retired from active employment, he is free to spend more time with Patricia, his wife, especially in traveling, and with his children, grand-children, church family and neighborhood friends. He has answered what he considers to be the important questions: What is life asking of me? What do you love doing? And, what need does it serve? Earl lives by the mantra of passing it on, which means helping others without expecting any type of payment. It was through his initial offer of support to Ms. Southgate that the RVers became involved with her trip.

Six variations on connections that met a universal need - living, loving, learning and leaving a legacy – were unveiled during talks with my conversation partners. Each one offered a unique perspective based on personal experience, demonstrated how only what is needed is taken from a story and revealed how the sharing of information,

learning from the past, teaching and building community can enable us to create our desired futures.

To Leave a Legacy: Unity Starts Here

Experience is not what happens to a man;
it is what a man does with what happens to him.
- Aldous Huxley, "*Texts and Pretexts*." 1932.

To seek meaning, to make a contribution, to serve human needs in a principled way is to leave a legacy. It is a spiritual quest for purpose and the voice of conscience. Just as Polaris or the North Star was a symbol of freedom to slaves and a guide star as they navigated from the South, Philip "Phil" D. Saunders continues to define his own true north to freedom by pondering over the following questions:

- What is important to you?
- What has been your contribution to making the world a better place?
- What hopes and aspirations do you hold for your children and grandchildren?

He is a living testament to the belief that it is never too late for us to become what we might have been. After retiring from over two decades of working in social services, he was appointed and subsequently elected twice as councilman. His life is defined by making meaning and contribution to the betterment of his own, as well as on behalf of the community in which he serves.

We met on a sunny Saturday afternoon in June 2005 for the interview. I've been a guest at Phil and Cindy's home many times and am always impressed by the neatness and cleanliness of their home. Not even a single piece of paper is left unattended. Their home is tastefully decorated to include family pictures that either grace a coffee table or hang lovingly on a wall. In every room, there's a place for everything and everything seems to have its place. It was easy to settle into the inviting ambiance of this conversation.

Always a courteous host, he made sure that I was comfortably seated in a spot of my own choosing in the living room.

Phil had been waiting anxiously for this day. “I love this stuff [history]. I’m a history buff so I love history, especially Black history.” Before our talk began, he left the room to get several documents from his files on the walk with Ms. Southgate. This would not be the only time we paused while he retrieved some treasured memento from either the walk or his family history. “The main book I have on Black history is my father. You can take these things if you promise to give them back.” It’s interesting to note that the term history comes from the Greek *historia* “an account of one’s inquiries” and shares that etymology with the English word *story*. It is both history and story that brought Phil and I together on this day.

“I had to be a part of it,” Phil explained. He referred to Ms. Southgate’s journey as a re-enactment and his participation as “something I had to do if no one else would.” Kouzes & Posner (1999) state that: “well-told stories reach inside us and pull us along” (p. 104). Phil recalled being with Joan. “I personally felt that Joan had me. I was with Joan but not just with Joan Southgate but with thousands of African Americans that were trying to make it.” This aligns with the assertion that “when people can locate themselves in the story, their sense of commitment and involvement is enhanced” (Kouzes & Posner, 1999, p. 104). Phil shared more detail on the history of his family, some of whom had gone across the river in the same place where Joan, in her travels, crossed. “They owned land in Cincinnati and it was taken from them. Perhaps if they had had a choice – able to make a choice and *live* [emphasis is Phil’s] that choice, things would be different.”

Phil is what people refer to as the consummate politician. As council president and membership chair of the local homeowner's organization, he holds a leadership position that often times finds him busy in a wide variety of roles, such as:

- Facilitating an authentic democratic process
- Advocating public policy or on behalf of those who would otherwise have no voice
- Making decisions in the neighborhood
- Writing an editorial
- Presenting an opinion at a community meeting
- Mediating a dispute

His vision of an uplifting and ennobling future impassions his voice. He is a trusted, loyal friend to many and such a pleasure to be around. On a lighter side, to say that Phil enjoys a good conversation and loves to talk is an understatement. He is quick on his feet, a good listener, has a wonderful sense of humor and a contagious laughter. So I was surprised when he was momentarily at a loss for words when I asked him to describe freedom.

"I don't know if I could ever describe freedom in one word or maybe two sentences." We sat in silence for several minutes as Phil pondered my question. He sat back in his chair, occasionally closed his eyes or looked to the heavens as he re-wound the memory tracks of his mind searching for the answer. "Well," he said, "I talked about unity, togetherness, being a part of. Freedom to me is being a part of." Phil lived in the South's separate but equal reality. As I looked at Phil, I could imagine the unique challenges he faced growing up in the South. This tall, thinly built, distinguished looking African-American could have easily passed for being Caucasian. While going door to door during one election campaign, a white resident commented to Phil: "I'm certainly

glad to see that one of us is running." Acceptance, being a part of, and being respected for who and what you are is at the heart of his soul's code.

He was witness to his father serving in World War I only to return home and not be able to sit at a table in a restaurant to eat. The more we talked about freedom, the more we came to understand that freedom was inclusive of choice, unity, and peace. Phil carries special memories from his journey with Ms. Southgate. In particular, crossing the Peace Bridge in Canada was "history repeating itself." The Peace Bridge, pictured below, was opened in 1927 to commemorate 100 years of peace between the US and Canada.

The RVers let her out in the middle of the bridge in the United States because she wanted to walk into Canada. Phil and others had to go across first to get an okay from the Canadian government to allow Ms. Southgate, her daughter and grandchildren to walk across the bridge. One of the officers said no. So the RVers asked to speak to a supervisor. By then, both the Canadian and United States press were on the scene and

Canada opened their arms to Ms. Southgate, her family and those supporting her, allowing them to walk across the Peace Bridge into Canada. “You had to be there to see all of this happening. The expression of the supervisor on the bridge who said ‘oh sure, let her do this’, while one couldn’t have cared less about her doing it.” This was an example of what can be accomplished when people work together in collaboration for the common good.

What Phil experienced on the Peace Bridge is an age-old lesson practiced today. “We can be peacemakers in our small part of the world only when we are at peace within ourselves” (Kouzes & Posner, 1999, p. 174). Phil has found his voice. “We grow in personal authenticity when we engage in public action that is consistent with our vision and values” (Grace, 1999, p. 37). Under his leadership and initiative hangs a poster in council chambers that reads: Unity Begins Here. “Everyone,” according to Phil, “whether black, white, pink, blue or green, deserves the right to freedom and it takes unity to create that freedom.”

In 2005, Phil was named a trustee, the first African American, of the Bedford Historical Society. For him, loving history and having a particular interest in the history of slavery is a passionate pursuit. He teaches and has always taught history to one of his grandsons. And, with a twinkle in his eye and a smile of satisfaction, Phil informed me that this grandson is going to study history in school. Being a minority, an African-American, and knowing where he and his ancestors came from, and how they have been treated are all very important aspects of Phil’s life. He believes that Black history should be taught as part of the school curriculum and not simply celebrated as one month out of the year. “If we don’t stand up and say we need to teach Black history, who will?” This is

the question, says Phil, brought to the table by Joan Southgate. Teaching Black history is teaching the history of the United States and part of the legacy that Phil would leave.

I don't mind if you've got something nice to say about me
And I enjoy an accolade like the rest
And you can take my picture and hang it in a gallery
Of all the "who's who's" and so-and-so's
That used to be the best at such and such
It wouldn't matter much

I won't lie, it feels alright to see your name in lights
We all need an "atta boy" or "atta girl"
But in the end I'd like to hang my hat on more besides
The temporary trappings of this world

I want to leave a legacy
How will they remember me?
Did I choose to love?
Did I point to you enough?
To make a mark on things
I want to leave an offering
A child of mercy and grace
Who blessed your name unapologetically
And leave that kind of legacy

Source: Legacy lyrics by Nichole Nordeman

To Love: Still Waters Run Deep

I've learned that sometimes all a person needs is a hand to hold,
an ear to listen, and a heart that understands.
- Andy Rooney

To want to be treated kindly, to belong, to connect with others, and to be concerned with relationships is to love. It is social and emotional, a posture of the heart's desire to love and be loved and the voice of passion. Ruth "Cindy" Saunders is rather reserved by nature but personifies the saying: Still waters run deep. The meaning originated as a practical rule for people navigating a boat on a river or stream. When you saw water moving fast or rough, the stream was shallow there. When the water appeared to be still or at least moving very slowly, the water was actually deep at that point.

Cindy and I met on a late Friday afternoon in June 2005. Our conversation started in shallow water but traveled into the depths of her soul, calling up memories from time long ago and trying to reconcile them with the present. In my lap written on a piece of paper were a couple of my interview questions. When Cindy removed this paper from my lap to read the questions for herself, it became apparent that she was intent upon giving me the "right" answers to my questions. Just as we started to talk, Phil, who was in an adjoining room walking around, offered a couple of comments. I gently reminded him, as only friends can do, that Cindy had not interrupted his interview with me. While Phil and I laughed, Cindy remained deep in thought and oblivious to Phil, his comments or my admonishment to him.

Phil announced that he was getting ready to leave the house and with his departure the quiet stillness within Cindy appeared to engulf the room. Our conversation

began and once she allowed herself to relax and settle into our talk, she revealed far more than she realized. “I am so surprised that I talked so much. I can’t believe I said all that. It was wrenching to read and took me a few days to get through it.” These were her comments after reading and validating the accuracy of the transcribed interview.

There is much more to Cindy than what meets the eye. She is a fair complexioned Black woman, tall in stature, with a dignified presence. Anyone who has visited her home knows that she loves to cook and is a considerate hostess. Some time ago when my husband was placed on a restricted diet, Cindy, in her own caring way, baked some zucchini bread, a simple but deeply affectionate gesture, for him. This is just one example of how she loves and cares for others. Now retired, Cindy knows a lot of people and they her, from her former work environs, her volunteer work in the neighborhood and the local school system, her church and her husband’s political activities. But I’d venture to say that few know Cindy well as she is guarded and selective about those to whom she calls friend.

Behind this calm exterior and beneath this placid surface is a tower of strength hidden from a cursory view. When Phil was ill, she, as the fierce protector of her family, immediately took charge, restricting his activities, sheltering him from outside interruptions, and carefully monitoring and preparing his meals. During our interview, when it became understandable that I wanted to listen and hear her story, Cindy who is usually quiet and says very little, shared a lot of deep knowledge on the various ways she connected with Joan Southgate and the untold story of the freedom seekers. It was a journey like no other and one where Cindy proclaims: “I’d do it again. I really would.”

From her past, Cindy related her experiences as a child and young girl growing up in the South to what our fore parents must have endured. “I remember the Ku Klux Klan ‘cause I’m from Virginia. Some nights we couldn’t play outside. You didn’t ask why. You were just in the house that night. Cindy recalled other memories from her early work experiences. “I rode in the back of the bus. I had to wear a uniform *to the beach* [emphasis is Cindy’s] so that everyone would know that you don’t go in the water. You’re not allowed in the water.” This journey with Ms. Southgate, the re-enactment of the Underground Railroad, proved, according to Cindy, that her experiences in Virginia were nothing compared to what our people suffered. In a world where we all want and deserve to be treated fairly, “it makes you madder than hell,” exclaimed Cindy.

The experience with Joan Southgate was bittersweet, sometimes pleasant but painful. “It’s a modern story, if you will, that Joan Southgate tells.” Cindy became “interested in following or keeping up” with Ms. Southgate because of the way she told the story of “discovering the other side of slavery.” Cindy readily acknowledges the good people who helped the freedom seekers but she is still angered by the way they were treated. One of Cindy’s more moving experiences occurred while visiting a museum at a church in Buffalo where they have an underground place used to hide the slaves. “And Karen, it looked like an open grave. It was a hole. And, I

thought to myself ‘my God’. I just couldn’t imagine. I couldn’t imagine my *self* [emphasis is Cindy’s]. I’ve never experienced that particular aspect of actually seeing the dankness, the smell, the whole bit. To me, it just had the frightened smell. You know when you’ve been somewhere when the adrenalin is going and you’re thinking my God am I going to get out of this?”

For Cindy, Joan Southgate had “a way of weaving the story and bringing the present into the past.” So much so that “you can’t really refuse [Ms. Southgate] ‘cause you gotta go” [on this journey]. Ms. Southgate stated that “not only would you learn about your past but you would learn about people as you go along and how they relate to you and how you relate to them, not anything to do with the slavery part of it which was really, really nice.” Cindy was amazed at the way people came to Ms. Southgate’s aid, crossed with her over the Peace Bridge, and genuinely supported her journey. “Very few people are able to make that connection where people want to go with you for whatever reason.” Through Ms. Southgate’s storytelling, Cindy learned that she [Ms. Southgate] had met some fascinating people. From all walks of life, “she was able to get people to rally around her for whatever.”

In Cindy’s present role as a volunteer teacher’s assistant in the local school system, she works with multi-handicapped children. Not having taken any type of specialized training, everything has been learned on-the-job. “I learn with them. I learn about them. I’ve learned to be on their level to get across a point. Sometimes it works and whatever we did together was special to them. They’re able to understand my way of making a connection and that’s the best part of it, I think.” But she also sees a strong disconnect among the children at the junior high school. “There are kids that are in

groups and those wanting to be in, wanting to belong. I want to say: Don't you know you might need each other one day. You'll both be going up to the high school. They'll learn. If they don't, they won't survive."

Survival, for Cindy, is to serve human needs in a principled way. It is the comfort that comes from feeling valued, heard and respected, as well as treating others in the same fashion. Bittersweet can also be bitter, then sweet. Cindy's grandfather met her grandmother in Canada. While there, Cindy inquired about the Littles' in St. Charles, Canada and found that they are all over the place. "This was something for me. It was really touching to – that's not the exact word," as her voice drifted off. In her view, the journey was worthwhile and she wants to go back to Canada one day to explore her family's roots.

Cindy asserts that the "viewpoints, the listening or what we [the RVers] got from the journey will be different" for each one. She believes that because of the way Ms. Southgate tells the story, "it will affect our children" in terms of looking where we were, where we've come and how much further we can go. "I think if they listen to her story, they'll gain by it. I can't tell you what it would be but they will take something away."

Will we, the human race, ever learn from our past is a question that weighs on Cindy's heart. The history of slavery cannot be undone. It was horrific. Our children must first know their past so they can create their future. As Frederick Douglass declared in 1884, "Memory was given to man for some wise purpose. The past is the mirror in which we may discern the dim outlines of the future" (Retrieved December 1, 2005 from http://www.cr.nps.gov/ugrr/learn_b2.htm). As Cindy concludes, "There's still prejudice today" where people are judged solely on the basis of skin color. Her hope is that we will

return to a time when “we were more of a family, where we had to [and did] depend upon one another.” Ms. Southgate’s story presents an opportunity to reconnect with our past and with each other.

To Learn: Fair Winds and Following Seas

The real voyage of discovery consists not in seeking new landscapes,
But in having new eyes.

- Marcel Proust

To grow, to develop, and to be used creatively is to learn. It is an aspiration of the mind, a disciplined focus and the voice of talent. It should not have been a surprise that my interview in October 2005 with retired Torpedoman Chief Petty Officer (SW) Robert "Bob" P. Pallat was short, to the point and focused on facts and learning. While still in high school, Chief Pallat joined the Naval Reserve at Naval & Marine Corps Reserve Center Cleveland, Unit 4-88L on January 13, 1963. Some thirty-two years later, he was completing this tour of duty from the well ordered, disciplined and ritualized life of the military.

It was a distinct honor for me to attend his retirement ceremony on October 15, 2005. The ceremony was held at the Naval & Marine Corps Reserve Center in Akron, Ohio. It's a rather ordinary-looking brick building that proudly displays the flags of the United States, the Navy and Marines. The chain-linked fence that surrounded most of the property held posters and signs made by loved ones welcoming home their soldiers from different parts of the world. Once inside we moved to a rather non-distinct gymnasium with open seating and a small stage with a podium.

What we experienced was neither plain nor inconsequential. The ceremony was filled with ritual such as the singing of the National Anthem, parading the colors, presenting certificates of appreciation, and passing-of-the-flag. It was a momentous and emotional event for me, as I not only paid tribute to Bob, but to all those brave men and women - my father, aunt, uncles, husband and son – who take the oath to protect our

freedom. Equally enlightening was the witnessing to a private side of Bob. As he presented Karen with flowers and thanked her for being his best friend, I could hear the feelings in his voice. Putting his emotions on public display is uncharacteristic behavior for Bob, not something that he is incapable of showing but arises in an uncontrollable moment from the depth of his soul. This disclosure confirmed an earlier assumption and decision I made when Bob and I were talking about Joan Southgate.

Though Bob was in some discomfort, from a back injury suffered in a car accident of long ago, I believe self-censorship, borne of the military culture, restricted our interview to more facts and less feeling. I drew upon my experience in conversing with my father, now deceased, who retired as a Bird Colonel, a full colonel, from the United States Army. Instead of prodding into the deeper waters of emotion, I was respectful in allowing Bob to share what he felt comfortable in sharing with me.

This was especially important because Bob and I experienced a false start in my initial attempt to interview him. His wife, Karen, also a career Naval officer, was on duty out of the country when I first contacted Bob. My sense of his guarded response to participating in an interview could very well have been circumstances of bad timing. For on this fall night, when I arrived at their well-manicured home, both Bob and Karen met me, with the warmth and congeniality afforded to welcome guests.

By prior arrangement, Bob and Karen were going to be interviewed on the same evening. I went downstairs to the lower level to interview Bob first. Being a seaman, I considered that his respect for Mother Nature and his sensitivity to the environment might yield a preference for learning through the senses (smell, taste, vision, hearing, touch), in particular hearing, so I was careful to re-explain the facts (the purpose for the

study, the step-by-step procedures and expected results) of my study. Once the facts were made clear, we started talking.

When Bob first met Ms. Southgate at the home of Phil and Cindy Saunders, he didn't know what to expect. He reminded me, during the interview, that he had not taken notes and that what he was sharing was all from memory. Prior to that first meeting with Ms. Southgate, he received information that there was "some lady actually walking the route of the underground railway … and it sounded really great." "I don't know that I can say that it was the same for myself as the African Americans involved in the program," but as she started telling her story, "it was like an eye opening, like Gee, you know, here's a chance to find out a little bit more, something that we never had the opportunity to learn in schools." As a life-long student, Bob was immediately attracted to Joan Southgate's story as an opportunity to grow, learn, and gain new perspectives. His quest for learning appears to come from a desire to do what is right.

Bob was raised in the Cleveland area in the 1950's and "there was no such thing as Black History." As a child, he thought the Underground Railroad was "some kind of rapid transit or something that went underneath the streets or something." Faced with the prospect of increasing his knowledge about freedom seekers and conductors, enhancing his own self-awareness about the world around us, and "learning a bit more about the human aspect, rather than just reading a book or magazine," Bob decided to be a part of Ms. Southgate's journey.

I don't know when the phrase was first used but "Fair Winds and Following Seas" is a nautical benison and one that Bob has adopted for the whole of his life. It represents the ideal underway conditions for which sailors yearn, near-perfect weather. Bob and

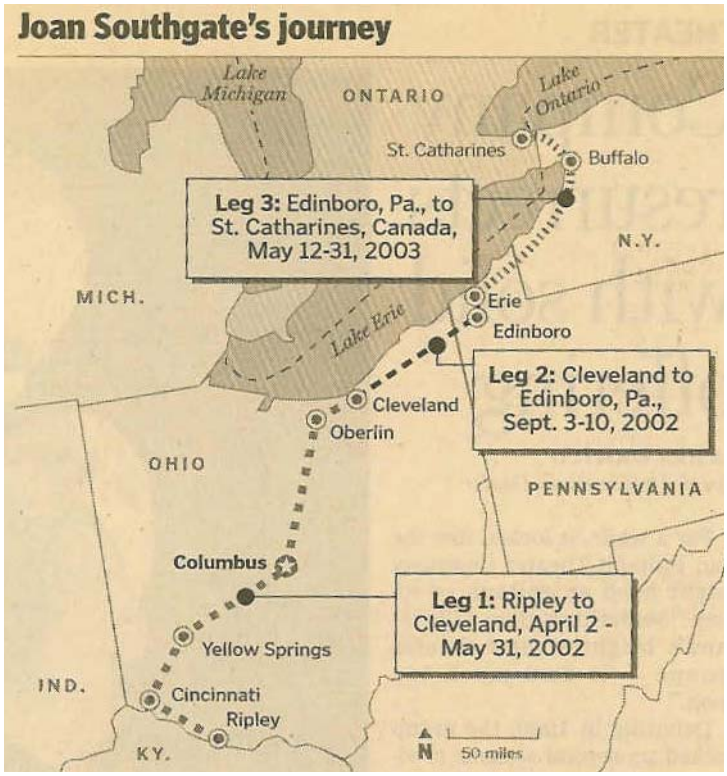
Karen have been residents of Bedford Heights since 1970. They are charter members of a homeowners' organization started in 1974, where Bob has served as secretary and member of the safety committee and nature club. He was also a charter member of the Democratic Club of Bedford Heights. His voice is articulated by using his talents to help create and maintain a premier community. In both his public and private lives he abides by the following: Do your duty in all things. You cannot do more. You should never wish to do less.

Fair wind is hope that the wind will fill your sails favorably for the duration of your voyage. Following sea refers to a sea swell that doesn't overtake the ship. But inherent in this blessing is a warning to not become complacent, for winds are not always fair and the seas often crash against the ship as she plows through ocean waters. Bob has had limited, albeit unforgettable, incidents with racism, confirming that life is not always fair and ignorance and intolerance can hit any one of us when it's least expected.

When he was in active duty Navy and stationed in South Carolina, Karen, his wife, came to meet his ship. It was 1965. "They still had signs that said colored and white and my wife went into the wrong one. An elderly Black lady says: What are you doing in here? You're not supposed to be in here. This is for colored people, you know." This was a big eye opener. "My wife couldn't understand that 'cause we were not exposed to that. We didn't have that understanding." Much later in our conversation, Bob noted that: "If you don't keep telling the story [Joan Southgate's story] and getting exposure to it, you're going to have a lot of ignorant people out there. And, it doesn't matter which race you are either. Ignorance can go both ways."

Bob also remembers the "big push here [in Bedford Heights] to try to ban the Black people from moving into our neighborhood. Right across the street someone knew that a home would possibly be sold to a Black family so they flooded the basements and everything before they moved in. That's in 1970. So I was exposed to a little bit of that."

Bob recognized his limited knowledge on the historical aspect of slavery, prejudice, and intolerance. This limitation is not due to a lack of courage in discovering new oceans or being open to having assumptions challenged. During deployments, Chief Pallat entered the Realm of the Golden Dragon (crossing the international dateline); Order of the Big Ditch (numerous times transiting the Panama Canal); and Shell Back (crossing the equator). His knowledge gap rests on incomplete formal schooling on the history of slavery and non-existent opportunities to experience and dialogue on the untold stories of slavery. This time, by land and not by sea, Ms. Southgate's journey was just one more adventure, an opportunity, for which Bob was prepared to explore.



"Though some will say that was way back when why do we have to keep talking about it? Well, I think you do. Otherwise you forget and people will or have the opportunity to fall back into doing the things that are not right. So you have to remember. You cannot forget. A great deal of people will do what is right and there is some good in people even – no matter where, if it can be nurtured and brought out…When you give people the opportunity to do what is right, a lot of times they will step up to the plate and do that."

Chief Petty Officer Retirement Creed

> You have on this day, experienced that which comes to all of us who serve on active duty in "Our Navy." I say "Our Navy" because your departure from duty in no way terminates your relationship, regard, or obligation to the United States Navy and your fellow Chief Petty Officers. By law and tradition, U.S. Navy retirees are always on the rolls – ever ready to lend their service when the need arises. The respect that you earned as "The Chief" was based on the same attributes that you will now carry into retirement. You should have no regrets and should not view your retirement as an end of an era, but rather as orders to a new and challenging assignment, to a form of independent duty. Remember well that you have been, and will always be an accepted member of the most exclusive
> of all maritime fraternities – that of the U.S. Navy Chief Petty Officers. All Chiefs salute you – retired Chiefs welcome you - - and we wish you the traditional "Fair Winds and Following Seas."
>
> Best regards, Chief Petty Officers

To Live: You Don't Miss Your Water Till Your Well Runs Dry

> "Everywhere the human soul stands between a hemisphere of light and another of darkness; on the confines of the two everlasting empires, necessity and free will."
>
> - Thomas Carlyle

To live is a survival need and the voice of necessity that is both common and unique to each person. At a rudimentary level, according to Abraham Maslow, the American psychologist who developed the well-known, five layers of the Hierarchy of Needs, to meet basic physiological and safety needs (such as food, clothing, shelter, economic well-being, health, and protection from danger) is to live. Once these lower needs are met, people can move forward and onward in reaching their potential. By and large, Karen Pallat has a way of being in the world that is orderly, structured, natural and flowing with life. She has found her voice and articulates it through the freedom to make choices on how she wants to live and what she desires for her life.

As a Navy officer and during deployment, she sometimes finds herself in places where she must place an inordinate focus on safety needs. But in her day to day life, Karen has also found stability and consistency in an otherwise chaotic world. The need for structure and order manifest themselves in the form of an insistence upon having a home in a safe neighborhood, job security, a good retirement plan and so on. The Pallats have lived in the same community for over 30 years. This need for genuine caring and sustainable relationships is also found in her career choices. With 25 years of service, Karen retired as Chief Law Clerk for the Cuyahoga County Public Defender, Felony Division and is still actively employed by the United States Naval Reserve as a Legalman.

The need for love and belonging is met through her husband, her son and daughter, friends, her career, and her community. It is quite noteworthy that she and her husband can share distinguished naval careers as part of their marital bliss and their son, also a Navy man, is following in parental footsteps. Karen is easy enough to be around and has never shied away from volunteering in the community. She's equally comfortable with her own company, particularly in relation to nature. She enjoys working in the yard and her flower garden. As an avid runner, Karen enjoys the solitude that leaves her to her own thoughts and reflections while jogging through the neighboring Metroparks area. It's no wonder that she would relish the adventuresome spirit of camping and traveling. In the far left corner, Karen is pictured at a campground while traveling with Joan Southgate, in the foreground.

Karen is practical, down-to-earth and exudes feelings of confidence, competence, independence, achievement, and mastery. She has an acceptance of self, which allows her to be who she is without irrational distress for trying to 'fit in', and of others that is both

healthy and respectful. In knowing her, you understand that it does not matter and has never been a concern for her that she is one of the few Caucasians that are members of the Lake Erie Travelers group. Where she is autonomous, she is not pretentious or indifferent. So I found it interesting and, at first, an odd word choice when she described her journey with Joan Southgate as “fun”. In response to my inquiry on whether she would be interested and willing to participate in my study by sharing her experiences with Joan Southgate, Karen stated: “Sure. I’d be happy to talk to you. It was fun.”

Karen and Bob had arranged to interview with me on the same evening in October 2005. As soon as the conversation between Bob and I reached its conclusion, he yelled upstairs to let Karen, his wife, know that it was her turn. No time was wasted in moving forward with the next conversation As Bob left the downstairs family room, I inserted new audio and video tapes into their respective recording devices. By then, Karen had entered the room and settled comfortably on the couch. Though I didn’t feel the same sense of priority as I had with Bob, in needing to review the details of my study, I did review them briefly.

I knew that I wanted to know more about how this trip with Joan Southgate was fun for Karen. But rather than pose the question, I wanted the connotation of fun to emerge from our conversation and it did. The interview with Karen was the shortest, in length of time, compared to all the other conversations but that did not impede her ability to share a revelation of a profound and personal experience.

One morning Joan and Karen left the campground and started walking north. They walked and talked for hours. “Here it was in the middle of the day and with paved roads. We were facing traffic so everything was safe. You know people would look at us

and wave or not." Walking, jogging and running are activities that are enjoyable, pleasant, and fun. But then a question between the two – "Can you imagine trying to do this at night?" – took them out of themselves, creating an ability to see things, even the ordinary act of walking, with wonder. They were walking on pavement that was surrounded by swamps on both sides. "Just imagine if it was dark and we were in these murky waters. We don't know if there are snakes" or other unknown dangers lurking at the next turn. For several hours Karen and Joan walked and talked, immersed in a roller coaster of emotions imagining the fear and danger at every turn and the exhilaration and anticipation of arriving at some safe destination.

"I don't know; it was chilling. You know, to put yourself in the situation of people who had *had* [emphasis is Karen's] to do this." You don't miss your water until the well runs dry. Freedom seekers, with the hope of being able to meet basic physiological, safety, belonging and esteem needs, had to flee from bondage. They sought what is taken for granted and, given the freedoms we experience today, Karen found it unimaginable.

The experience in walking with Ms. Southgate left its mark on Karen. "It was – the whole experience was very eye opening. And, I can't say experience because we really didn't experience it. It was still modern day, with tennis shoes on your feet, clothes on your back, food in your belly." We were doing it for fun and she [Joan] was doing it for the experience. To have to do that [walking the Underground Railroad] for your life, it was just amazing." Given her propensity for running as exercise, I would imagine that Karen envisioned the journey with Ms. Southgate to be fun. An unexpected pleasure was being able to see something new while undertaking something old. What she experienced

was a freshness of appreciation for what freedom seekers of all ethnic, racial and individual variety might have endured.

At the same time as Ms. Southgate told her story and the story of the African American slave escaping, “I was thinking of my own relatives who came after World War I. My grandmother’s country became Romania and they were a minority then.” Karen doesn’t know a lot about her family’s escape from eastern Hungary all the way up to Hamburg, Germany. She can only imagine them as frightened teenagers, traveling hundreds of miles and unable to communicate in the three or four different languages they encountered while traveling through countries en route to the United States. There are so many connections in our stories. “People should talk about it. Write it down or something so that people in the future will know what your family went through. It shouldn’t be lost” and it shouldn’t be taken for granted.

To Love: Connecting With Our Spirit

We are not human beings on a spiritual journey.
We are spiritual beings on a human journey.
- Stephen Covey

Spirituality is connecting to one's "higher self" or tapping into the deeper meaning of one's life. It is the highest form of love. Howard Gregory spoke freely about spirituality as an inner strength that he believes to be at the core of life and the answer to the world's misery and affliction. In the years that I've lived in Cleveland, Ohio, I've driven past his home probably over a thousand times but never noticed it. I saw it but didn't see it. But now, along with the honor of getting to know Howard, I know that his home, this aforementioned unseen house, is blessed with a spirit of love that contributes to the fullness of his life and to the lives of those he touches.

As I talked with Howard, I was able to better understand his perspective on spirituality. It is about giving selfless love and being loved unconditionally, seeking unity and harmony in and discovering the meaning of life, showing compassion, being connected. It seems that the spiritual journey is a mysterious and personal one that is profound in nature and speaks to an inner resource that helps make sense of the world and our place in it. In November, 2005 Howard shared with me the story of his experiences with Joan Southgate. When he first met Ms. Southgate, he was president of Lake Erie Travelers Group. Still a member, today he is also an officer in the National RVers Association. Though a stated intention during our interview, he shared stories from his personal path of spiritual growth and awareness that became unraveled along the journey.

It was a typical early November day when Howard and I met for the interview. The weather was slightly chilly, with the threat of rain hovering in the clouds. Because I've driven past Howard's home so many times, it was easy to find. It is situated off a heavily traveled street that serves as a conduit between two communities and additionally leads to a freeway entrance/exit. The area is both residential and business. As I entered the driveway of this large colonial style home, I saw a couple of parked cars and a church bus. I left my car wondering which door of the house I should enter. At the nearest entrance, the walkway was flanked by a ramp commonly used by persons using a wheelchair. It didn't appear to have had much traffic so I continued walking towards the rear of the house. As I approached the side entrance, I could see children's playground equipment set up in the rear yard. This was a busy household, I thought. I rang the bell and moments later Howard answered the door.

Once inside, Howard introduced me to his wife, Juwanna, and a rambunctious two-year old who was eagerly trying to catch a glimpse of a new face walking in the door. Howard led me past the dining area, a sitting room, and one of his adopted children sitting in a wheel chair towards the living room. This young man had obvious physical disabilities and breathing challenges. A children's show was playing on a large screen television in the sitting room. Juwanna turned the volume down and asked whether the noise would bother me. As she explained how the television program would help keep the toddler quiet while Howard and I talked, I reassured her that we'd be fine.

As soon as the audio and video equipment were set up, I started the interview. Ever so often a gurgling sound came from the young man seated in the wheelchair. It was unnerving, for me, because it sounded serious. I continued to focus on Howard's face for

some indication as to whether he needed to stop and provide medical attention to his son. Howard was not apprehensive about or distracted by the sounds so I understood that these were familiar sounds in their household. I followed Howard's lead, settled into our conversation and allowed myself to be fully present during the interview.

The signs were all around that this was a home of love. Driving the church bus is but one way that Howard is very active in his church. He and his wife's caring for others extends well beyond the seven children and twenty-one grandchildren of their own. I'm sure the playground in the back yard is well used. "I'm used to always being full because I always got a full house. Even when we go places, we take kids with us a lot." When he and his wife accompanied Ms. Southgate on her journey, they took a couple of kids with them. "They [the kids] were able to talk with her and walk with her a little bit. And they learned a lot. Some things they really didn't know."

Each room that I walked through could have had an entrance sign saying: Welcome. Take off your shoes and stay awhile. On the day that I returned a copy of the transcribed interview to Howard, he was in the basement creating a master DVD, set to music, of past family reunions, trips, special occasions, snapshots of family members who have since died and other memories that would eventually be copied for each of his children. I also learned on this day that he now has one great grand-child. In addition, spirituality means developing our capacity for compassion for those who are suffering. With a deep sense of concern for pain that comes from separation, Howard was making videotapes of his foster children so that when a child returns to his or her mother, there will be something tangible for the mother to see and experience from precious moments she missed in the child's life.

According to Kali Munro, a psychotherapist, “every one of us has dreams that our soul needs to fulfill” (Retrieved January 26, 2006 from http://www.kalimunro.com/article_dreams.html). We have only to listen and answer its call to make the spiritual connection. Howard described several occasions where he heard the spirit’s universal whisper and felt its communal touch. “We went to several places that had an underground place. It was really something. It blew my mind. It shows that, to me, it had to be a spiritual battle.” There was no other explanation, as far as Howard is concerned, for how Harriet Tubman was able to lead them and keep them quietly hidden. “I don’t know how she did it.” But in the very next breath, Howard stated: “I know how she did it but it’s just amazing. God had to be with her [Ms. Tubman] in order to get those people and make so many different trips back and forth.” The same spirit was with the freedom seekers and the people that helped them. “We can’t down everybody. You know there are people all over the world that would, that did help, that have good hearts. It is really something to know that.”

Howard continued: “As she [Joan Southgate] walked this same journey, it seemed like that same spirit was with her to encourage her to keep going and also to encourage people to help her, that this might be accomplished and that people might be able to see it. On the last day of Ms. Southgate’s walk rain had been predicted for the entire day. Though the day was gloomy and the clouds were threatening, it only sprinkled off and on and actually “lightened up a little bit.” It was only “after her walk was finished” and as she climbed the steps to the church in St. Catharines “that it started to rain.” “God was there working with her as she completed her journey that she, Ms. Southgate, wanted to complete.”

Just being in St. Catharines, Canada was another spiritual connection. Howard always wondered what happened to those freedom seekers that made it to St. Catherines. “Once they came across the water into Canada where did they go? Did they go back to the United States or what?” He was totally amazed by the number of Black people he saw St. Catharines who actually lived there. “The majority of them are within fifty miles or so of St. Catharines.” The culminating event was held at the British Methodist Episcopal Church (BME), Salem Chapel (pictured below) in St. Catharines. Designated a National Historic Site of Canada, it is recognized for its close association with Harriet Tubman, the famed Underground Railroad conductor, who lived in St. Catharines from 1851 to 1858 and was a member of the congregation. Howard was thrilled to have met some Black people who are relatives of Ms. Tubman. “And they worship like we worship. I mean it’s just like ours. It will take you back to the time of our fore parents and when we were young with our parents and how they used to do things.” Another aspect of spirituality is communing and experiencing the fullness of life together. “It seemed like they had that closeness about them.”

People don’t understand, he argues, that this is knowledge that is valuable for us to have.” “Even my foster daughter who was with us said: Why do I need to know all this?” Howard explained: “You need to know from whence we came and you need to know about your history.” The experience at the church influenced his foster daughter’s thinking. She got interested and started bringing things to their attention. “So now it’s coming real to you,” Howard said to his foster daughter, “about what happened and how

hard it was, how difficult it was to do what needed to be done." Howard believes that this is yet another example of how the spirit moves with and for people. "It was just amazing. I almost cried. I went into the church and as a matter of fact, I did cry. It was really something. It was a great celebration just to be there with Ms. Southgate and to help her accomplish her last leg of the journey."

Howard believes that problems are erroneously put as Black and White issues when they are not. "That's just what keeps us apart and fighting each other." When I asked him what was the issue, without hesitation, he responded: "We have a spiritual battle in our country. If we could overcome that, we'd be all right." Howard gained a lot of respect for the people during that time who wanted to leave to be free. He reasons that we need to preserve our history and share it with our young people. "I don't care where you go, you still need to remember your past. It should inspire us to know that if you want freedom, then you have to pursue it. You have to be courageous and keep moving. As the song says, you can't let nobody turn me around."

Well don't you let nobody turn you 'round
Turn you 'round, turn you 'round
Well don't you let nobody turn you 'round
You got to keep on walkin', keep on talkin'
Marchin' to the freedom land

Well don't you let the policeman turn you 'round
Turn you 'round, turn you 'round
Well don't let the policeman turn you 'round
You got to keep on walkin', keep on talkin'
Marchin' to the freedom land

Well don't let the politician turn you 'round
Slow you down, slow you down
Well don't let the politician slow you down
You got to keep on walkin', keep on talkin'
Marchin' to the freedom land

Well don't you let the army general burn the world
Burn the world, burn the world
Well don't let the army general burn this world

You got to keep on walkin', keep on talkin'
Marchin' to the freedom land

Well don't you let nobody turn you 'round
Turn you 'round, turn you 'round
Well don't you let nobody turn you 'round
You got to keep on walkin', keep on talkin'
Marchin' to the freedom land

Steve Miller Band

To Live: Pass It On

I shall pass through this world but once, any good thing, therefore, that I can do,
or any kindness that I can show to any human being, or dumb animal,
let me do it now. Let me not deter it or neglect it, for I shall not pass this way again.
John Galsworthy

Earl Carrington, my sixth conversation partner, offered a precious perspective on what it means to live. His notion of basic survival is not bound by the sole importance and criticality of meeting physiological and safety needs. It extends into how a man chooses to live, for the end does not, in Earl's view, justify any means of getting there. His life is a testimony to what Mahatma Gandhi once observed: "One man cannot do right in one department of life whilst he is occupied in doing wrong in any other department. Life is one indivisible whole" (Easwaran, 1978, p. 145).

Scheduling the meeting with Earl proved to be the most challenging of my interviews. Though there were other RVers whom I could have contacted for interviews, I wanted to sit down with the individual who, by happenstance, met Joan Southgate and first introduced her to the RVers' club. Meeting him and hearing his story was important. After my telephone messages to Earl were not returned, I decided to pause, a practice recommended by Tara Brach, a clinical psychologist who teaches mindfulness meditation. Where "a pause can last for an instant, for hours, or for seasons of life," I stopped long enough to recognize that constant worry over unreturned phone calls would not move me forward (Retrieved December 30, 2005 from http://www.spiritualityhealth.com/NMagazine/articles.php?id=388).

With freshly found increased presence, I chose to write an email to Joan Southgate, requesting an interview. To my delight, she responded and two days later that

meeting was scheduled. During my telephone conversation with Ms. Southgate, she exclaimed: “You’ll never guess who I ran into this morning at Burger King, Earl Carrington and he was talking on and on about you!” I told her that was surprising because he had not returned my phone calls. “Well, you call him right now, as soon as we hang up.” I did and after a wonderful chat with Patricia, Earl’s wife, I spoke to and scheduled an interview with Earl.

Joan Southgate and Earl Carrington both live on the east side of Cleveland, Ohio. Because I was meeting with Joan Southgate on the morning of December 3, 2005, Earl suggested that I call him after that meeting to confirm the meeting location for where he and I would meet. That location was unusual or at least different from all my other interviews. The choice, dependent upon the time of day, was between a church and a fast-food restaurant. Later I learned that part of his normal routine on Saturday included time with his church family and time with his other retired buddies at a favorite eating spot.

We met at a MacDonald’s restaurant. Since we’d never met face-to-face, I didn’t know what he looked like. “Are you Earl Carrington?,” I asked one of the older men sitting in the restaurant. He slowly looked me up and down before responding: “No, but I sure wish I was Earl Carrington.” Totally focused on locating Mr. Carrington, I was caught off-guard by the flirtatious comment. For a split second, I nearly lost the lightness of the moment when out of the corner of my eye I saw a man, smiling, as he walked towards me. Earl introduced himself and led me to a corner table.

Being aware of my surroundings, I wondered whether we’d be able to have a good conversation. The counter area was busy taking and filling orders. A small group was assembled behind us immersed in jovial banter. I pulled out the audiotape but Earl

would not allow me to record our conversation until I first listened to his story. “I want to be sure that this is what you’re looking for,” he said. It was clear that I needed to respect his wishes and similarly evident that too many of us carry the belief that we don’t have anything worthy to contribute which often silences our voice. I knew that Earl and I would eventually meet in an interview. With the same exactness, I knew that he had something important to share. After listening, I told him that and was given permission to record the interview. We were so intently focused on our conversation that I lost awareness of the sights and sounds around us.

Earl was sitting in his parked camper while his wife was inside shopping at a local thrift store when he heard a knock on the door. He did more than merely open the door to an inquisitive Joan Southgate who wanted to learn more about recreational vehicles. He opened the door to a passageway for the last leg of Ms. Southgate’s journey into Canada through modern day safe-houses guised as recreational vehicles. Earl cannot remember how they got into the “walk” discussion but he saw a connection between her walk and the RVers love for traveling and offered to contact the president of the club on her behalf.

To an outside observer, this might seem strange because Earl Carrington and Joan Southgate were strangers to each other. But to Earl, offering help is in keeping with how he views himself in this world. “I look at life like this. I was put here for some reason. It looks like I was put here to help somebody and I’m always helping somebody.”

Generosity is extended to anyone in need, stranger or friend. On the day of our interview, Earl’s next task was to take a friend, who recently lost his belongings in a house fire, to buy a pair of shoes. A week earlier, upon hearing of his friend’s tragic loss of property, Earl took his camper, which was parked in the back yard, to his friend for

temporary living accommodations. I don't believe Earl could have responded in any other way.

He recalled an early memory from his days in military service. A Black sergeant pulled him aside one day to caution him about his association with two troublemakers. "Why don't you get your act together?," the sergeant asked. Earl did and "every time I start to do something wrong, I remember." What he remembers is who he is, what's important, and why, he believes, he was put on this earth. Earl calls this kind of knowledge "common sense." I call it a deep sense of self-identity and purpose.

"I tell everyone that I have a guardian angel that looks after me and keeps me going straight." Years ago while on a road trip, Earl's "car just cut off" and stopped running. It was late at night when a man stopped to help. This good Samaritan drove Earl to a service station and returned him, and the much-needed car part, safely to his car. "He wouldn't take any money but told me to pass it on. Do to someone else what I'm doing to you." Earl has never forgotten the deed nor the advice. "As long as I keep passing it on, the Lord is going to keep me here to do things like that."

Pictured above is Ms. Southgate at the end of her journey, climbing the steps to Salem Chapel in St. Catharines, Ontario passing it on.

Earl takes notice when people do and do not “pass it on”. One of the RVers’ main goals while traveling with Ms. Southgate was to be available to her when she needed to use bathroom facilities or stop to eat. “She’d walk all day and if she couldn’t find a bathroom, she’d call one of us and we’d pick her up.” On one occasion, she asked a lady sitting outside her home if she could use the bathroom. “The lady said no” even as Ms. Southgate tried to explain why she was walking. “Other than that it was a very good experience for me and everybody else.”

Another time, while they were at a campsite in New York, Earl witnessed the goodness of people. “Our grandkids were playing on a swing with some white kids. Earl started talking to a man who was with the kids telling him about Ms. Southgate and her walk. That night after picking Ms. Southgate up and bringing her back to the campsite, we introduced her to this man who was “a doctor or lawyer, one of the two.” Earl doesn’t know exactly what happened but Ms. Southgate was invited to and did spend a night at the home of this new acquaintance. This is the way things should be and have been. “I have to give credit” where it’s due. “There were a lot of nice white people who hid the freedom seekers, in the hay, in cellars, in the fields.” The kindness of strangers can be overwhelming.

Earl is not sure how people feel about him but he feels good in helping others. “I don’t put myself above anybody or below anybody.” He has a growing concern about the basic survival of our young Black children. Earl remembers camping trips with his children when they were young, where he’d “take them to the woods, show them how to

identify different leaves, how to start a fire, how to survive. Young people need to know how people used to live, how they traveled from the south to the north, how they looked at the trees and stars to see where they were going." Perhaps with this knowledge, they'd recognize their own potential for creating a life of substance and character.

I was impressed with Earl's respect for and knowledge about nature. "The average person doesn't know that the moss always grows on the north side of the tree." So when the freedom seekers were traveling at night in the dark, "all they had to do was feel the tree to know when they were headed right." Young people today "don't even fathom life."

To live a good life requires sacrifice. Sometimes that means foregoing immediate gratification for a sustainable future. "Working at MacDonald's is just a stepping stone. This is just to get you started, not for a living." At other times, sacrifice entails giving up a good for a higher good. Earl readily acknowledges that he has been blessed. He prospered while in the Army, leaving service as a corporal. He's had a "good work life" enabling him to provide for his wife and seven children, all of whom graduated from high school and have gone on to college. Now he enjoys his retirement years that include traveling and caring for his grandchildren.

Earl was quite clear in stating that he would not change his life "for nothing in the world." But I also understood the high regard and value he places on education. What he achieved in all other aspects of life and living, he did not pursue by way of a formal education. Life is about choices and consequences. What he did not achieve for himself, a formal education, he passed on to his children, a greater good in knowing that he was able to help them in a significant, life-altering way. Too many of our young people are

not willing to make a sacrifice today. “They don’t know one star from another one” and they have no sense of the right direction.

> Our deepest fear is not that we are inadequate. Our deepest fear is that we are powerful beyond measure. It is our light, not our darkness that most frightens us. We ask ourselves, Who am I to be brilliant, gorgeous, talented, fabulous? Actually, who are you *not* to be? You are a child of God. Your playing small does not serve the world. There is nothing enlightened about shrinking so that other people won't feel insecure around you. We are all meant to shine, as children do. We were born to make manifest the glory of God that is within us. It is not just in some of us; it is in everyone. And as we let our own light shine, we unconsciously give other people permission to do the same. As we are liberated from our own fear, our presence automatically liberates others.
>
> By Marianne Williamson from
> *A Return To Love: Reflections on the Principles of*
> *A Course in Miracles,* Harper Collins, 1992

The Storytelling Leader: Something Told Me

Whatever you can do or dream, you can begin it.
Boldness has genius, magic and power in it. Begin it now.
- Goethe

These portraits demonstrate that there are multi-voiced ways of telling and interpreting a story that links the past with the present and anticipated future. This last section describes the cumulative and symbiotic impact of individual stories that are dynamic, interwoven, complex, and, as a whole, provide more meaning beyond a single individual's search for meaning. Ms. Southgate used story, those told and previously untold stories, in such a way as to influence the behavior of story listeners. She was able to cut through differences and, as revealed through this study, make connections with the story listeners at deep, personal levels of consciousness "and you know that's the strangest thing," recalls Cindy, because "nobody knew Joan Southgate." It was not, however, only the story that story listeners responded to and acted upon. It was storytelling leadership. Together, the storyteller, Ms. Southgate, and the story listeners, my conversation partners, became both listeners and weavers of tales. Being able to say what people had in their minds and hearts (Bob, Earl); to allow them to see something they've not seen (Cindy) or imagined before (Karen); to find hope (Howard) and invite others to do the same (Phil); and to cause them to want to struggle for some shared aspiration (the many strangers met along the journey), is storytelling leadership.

This study also looked at what meaning could be derived from understanding the connection between storytelling and leadership. In this section, I share revelations from my interview with Joan Southgate and examine them along with the reflective comments

from my conversation partners on their experience with Ms. Southgate. It was and is a great privilege to sit down in conversation with her. I count myself among the many people who have enjoyed listening to the story of her journey but equally gratifying is to be on the receiving end of her respectful and attentive listening stance.

I arrived at Ms. Southgate's home on a very cold and snowy December morning. She lives in an area of Cleveland, Ohio that has very old but well kept homes. After pulling into her driveway, I called her from my cell phone to let her know that I was sitting in her driveway. She found it amusing that people could do that now. I asked her whether she wanted me to come in the front or side door. Front door it was. I entered her home, gave her a warm hug, expressed my gratitude for the interview and started to settle in. She told me we could sit anywhere I'd like so as we walked together, I looked around at the living room, the sitting area, the kitchen, trying to determine the right spot. Then something caught my eye. On the wall of the sitting room, a butcher paper banner was positioned on two adjoining walls with writing. I asked: "Is this something the kids made for you?" "No," she replied. "I wrote this before I started on my journey." I later learned that Ms. Southgate had taken it from a 2,500-year old meditation found in Jack Kornfield's *A Path With Heart*. It read:

> May I be filled with loving kindness; May I be well; May I be peaceful and at ease; May I be happy.

Wow, I thought to myself, this is all she asked for in starting the walk.

She asked me if I'd like a cup of tea. I said yes. I sat down in the sitting area, pulling out my tape recorder; setting up the video recorder; and getting the informed consent form together. As she read the consent form, she commented: "I just can't

believe it. Just thinking about the last leg of the trip brings chills." While she continued reading, I looked around the rooms. I liked the feel of her home. All the floors are beautiful hardwood, no carpet anywhere. It was tidy with everything neatly situated in their proper place. When the hot water was ready, she suggested that I come in to fix my cup of tea the way I liked it. Upon entering the kitchen, I shared my thought. "Let's sit in here at the kitchen table to talk. It's cozy in here." The wooden kitchen table and old "White Star" stove reminded me of visits to the homes of elderly relatives. The kitchen was always the gathering place or wherever the wood-burning stove was sitting. To the right of the old stove in Ms. Southgate's kitchen sat the microwave oven, an artifact of modernity.

Ms. Southgate asked that I excuse her for a moment so she could go upstairs and put on a top that was a little cooler on her body. While she was gone, I just looked around the kitchen, trying to settle my thoughts. This was such a privilege being welcomed in her home. She's very busy these days and a much sought after speaker. It was not lost on me how precious her time was and that she was willing to share some of it with me.

Ms. Southgate, her story and her journey are like her home, a mixture of old and new. During our talk, she asked me if I knew, which I did not, the word "Sankofa" which means looking back to determine the future. It is an Akan, people of Ghana, West Africa, word describing "the ability to review history to find strengths, to identify weaknesses and mistakes, and to define and plan the future" (Retrieved January 22, 2006 from http://www.kwabenaashanti.com/Syndicated_Columns/NYANSA.htm).

Ms. Southgate understands the importance of acknowledging the sense of one's past, present and future as a true sign of self-awareness. Her story, comprised of the untold

stories of the Underground Railroad, honored the freedom seekers and conductors in a way that has not been talked about before her journey. The RVers and their recreational vehicles as the modern day safe houses and the good people who helped her make this journey, the present day conductors, all speak to the old and new coming together. “Go back and fetch it” is how Ms. Southgate defines Sankofa. She wanted to show what she knew in her heart to be true, how people of different backgrounds, race, socio-economic status, faith, age and so on, could come together in a good way to make our world a better place. Ms. Southgate returned to the past in order to move both herself and us forward.

Before any questions were posed to Ms. Southgate, we engaged in some related small talk, reminiscing about our first meeting at Phil’s home and bringing her up-to-date on my research. My mention of storytelling and magic in the same sentence prompted Ms. Southgate to recite one of Goethe’s quotes: Boldness has genius, power, and magic. “An interesting combination,” she said, “and so true.” This is not to say that the person bold enough or brave enough to step out is a genius. It is from the act of doing that “this sense of wisdom and brilliance comes forth.” Ms. Southgate stepped out on faith when she started her walk, which stopped in 2003, but “the journey continues with people, like you [Karen] appearing in my life.”

She is still amazed at the connection made with the RVers. “How we connected was just another incredible – wrong word ‘cause that means not credible. It was magical.” Way before she started walking, she finally came to the comfort of accepting that not everything is a shock or unbelievable. “This is the way the world works if we let it.” The first interview question came from Ms. Southgate.

"Do you know how we [Ms. Southgate and the Lake Erie Travelers] met?" I started telling the story, as best I knew it, of how she was in a parking lot, going into a thrift store when she turned and saw an RV. She laughed: "Not even that good. It was not even a thing of seeing it." She went on to tell me about this magical moment. "I'm headed to the thrift store and *this is serious* [emphasis is Ms. Southgate's] 'cause it's Monday and everything is half-price." She was focused on task when, as her mother used to say, something told her to turn around, to go see if someone was sitting in that RV that she had parked beside. "I truly know that I was not aware that I had parked beside an RV.

"*And there sat Mr. Carrington* [emphasis is Ms. Southgate's] in the driver's seat!" Further wonderment of this story is that it was happenstance that Earl was sitting in his parked RV and at this precise location on this particular Monday morning. Because Ms. Southgate asked questions about the RV, Earl invited her in to take a tour. "He didn't say who are you, little old lady. He was the sweetest in every way."

Their conversation led to an invitation from the then president, Howard Gregory, for Ms. Southgate to make a presentation and ask for support at the RVers' business meeting. They didn't say that they'd have to think about it or get back to her later. Without hesitation, "they just said sure. They just said yes." I wanted to know what about Ms. Southgate had influenced these six individuals in deciding to accompany her on the last leg of the journey.

What Ms. Southgate calls magical, Howard describes as spiritual but all my conversation partners acknowledged the sense of connecting, whether with a memorable walk with Ms. Southgate (Karen), a personal history involving freedom and choice (Phil), the ability to reach others in a caring way (Cindy), the life-affirming and communal

contact with nature (Earl), or getting in touch with the inner teacher (Bob). They found personal meaning in the story of freedom seekers and their connection with Ms. Southgate was influenced by, with varying levels of emphasis, her presence, her knowledge, her intelligence and her voice, both literally and figuratively.

We never get a second chance to make a first impression and once made it lasts…and lasts and lasts. When Ms. Southgate first presented at the RVers' business meeting, said Phil, "she struck me right then. Seeing this tiny little woman come in and tell me that she runs or walks 5 miles a day" and at her age was impressive. Bob found Ms. Southgate interesting. "Let's face it. You can read a book or a magazine but that's impersonal. She [Ms. Southgate] was able to draw out the human element." Cindy liked her and felt "she was a nice lady" with a temperament Cindy admired. Ms. Southgate presented herself as someone who "saw something; wanted it; and eventually found a way to get it." A first impression is not always a visual one. Karen had a similar reaction of admiration for Ms. Southgate upon hearing about the journey. "I mean just to think about doing it." Making the walk to honor their footsteps was unimaginable.

Ms. Southgate was equally captivating due to the unexpectedness, given her age, of her physical stamina. "And again watching this lady, so enthusiastic and so positive and being as old as she was and I forgot how many miles her maximum was for her walk. I know I couldn't do it." Ms. Southgate carries an air of confidence about her. She may not have known all the details of the trip before starting out but you sensed no doubt that she would do it. Howard recalled from that first meeting that "she knew she could get it done." Upon hearing her personal, background stories, like that of her work history, family memoirs, and determination to physically prepare for the walk, she was seen as a

person of practical wisdom, commitment and, especially for her age, remarkable fortitude. “She’s a sprightly, elderly lady, that’s for sure.”

Without exception, all the RVers were impressed with and intrigued by her knowledge. “She was very impressive in her vast knowledge of slaves and the history of slaves.” During the journey, she pointed out the different safe houses and knew the background stories of each one. “This woman was something. I mean she knew the story.” “She’s like a knowledgeable grandmother.” As I would later learn from my interview with Ms. Southgate, she spent two years preparing for the walk. She searched the libraries and read the history books so that she would know the story of the Underground Railroad and be, therefore, credible and comfortable as she talked with others.

Ms. Southgate is blessed with an incredible sense of self or self-knowledge which contributes to and is demonstrated by her intellectual diversity. She is cognizant of her beliefs, desires and sensations and allows times for reflecting. Cindy observed that she [Ms. Southgate] would often write on her laptop during the wee hours of the morning because and as according to Ms. Southgate: “I do better this time of morning [when] my mind is clear.” It’s a time where she can become more aware of inner feelings and better understand her role in relation to others. This ritual is characteristic of intrapersonal intelligence.

“She could paint a picture with words” is descriptive of her verbal/linguistic intelligence. Phil vividly recalled arriving at the church and “seeing her [Ms. Southgate] and you see through her and you see those runaway slaves.” Words appeared inadequate and it was difficult to explain. Her ability to connect with people at an interpersonal level

was magnetic. Howard recalled: “When she tells a story, she just holds your attention.” Some wondered whether her small stature or the way she gave information provided the key to a powerfully felt connection. “I don’t know,” stated Phil, “maybe we’ll never know why she was able to do that. She was there, not forcing you to do this with her but you had to do this with her.”

Ms. Southgate found her voice, her calling and was able to articulate it a way that helped others find meaning in their lives and to contemplate on some universal truth – on living, learning, loving and leaving a legacy. “Even though,” said Cindy, “she has that little voice of hers, she could tell you a story and you’d feel that she left nothing out.” All of my conversation partners mentioned “something about her voice.” “She’s so soft spoken. “When she talked it seemed like it just goes right into you and through you.” Engaging, dynamic and charisma were all words used to describe her voice. “It had to be a kind of charisma to get us to help her without anybody questioning anything.” Ms. Southgate was trusted and where no one had reservations about her sincerity or the integrity of her decision to make the journey, everyone was interested in knowing and understanding why she made the journey.

I, too, was intrigued by the age at which she decided to make this journey. My first question to her was: “Why at this time in your life did you decide to make this journey? Why make this journey? Without a second thought, Ms. Southgate replied: “Because I had to. Each time I’m asked this question it takes me back to that moment and it’s stunning. I’m back there because it was a calling. It was truly a calling.” She was on an ordinary one-mile walk from her home and fussing in her head about why it was such a struggle and not easier. “It was that moment of realization that there were these people

who'd walked hundreds and hundreds of miles *on purpose* [emphasis is Ms. Southgate's] into no where but *to* [emphasis is Ms. Southgate's] freedom. She was struck by the impossibility of their mission and wondered "what it would be like to move my old body over hundreds of miles *and* [emphasis is Ms. Southgate's] to sing praises of all those involved in the Underground Railroad, freedom seekers and people that helped them."

We continued our talk, as though we were old friends, sharing our thoughts, feelings and perspectives on the experience of being both an African-American and Black woman. I was curious about the calling and so inquired: How did you recognize it as a calling and what in your body told you that it was a calling? "It was visceral. I use the word stunning in describing it because it really was. I'm stiff. I'm sore. I'm old. I'm breathing heavily coming off this little bit of a slope and was stopped in my tracks." She was not physically stopped but stopped from the ranting in her head to say: "wait a minute. There were people who walked hundreds of miles."

Some of the RVers experienced their own form of a calling. Cindy reacted at a gut level. "She has a way of weaving the story and bringing the present into the past to make it like you gotta go. You can't really refuse 'cause you gotta go." Phil stated: "I had to be a part of that. I was going to help her if no one else did and that's the way I felt about it."

I understood how the idea was formed and wanted to learn about what she hoped to achieve with this walk. "I've always thought of myself as a teacher." From the time she was a little girl, Ms. Southgate has always wanted to be a teacher. "Choosing the work I did was always about teaching, whether social work, community organizer or teaching in a classroom or being a parent. She can point to earlier learnings while at Syracuse University that directly relate to teaching. "So I had the book learning, formal

training and experience, and field work." Before starting the walk, Ms. Southgate spent two years going around the local schools talking about the Underground Railroad, finding out what the children were learning, having the kids help her design "this thing, this walk," giving it [the walk] a title, essentially turning it into a teaching project called *In Their Path*. (http://www.intheirpath.org/).

Teaching what had not been taught before was one of her goals. Once the project started to take form, she yearned "to know what it might have felt like and what I could do to honor them." She also wanted "to change the construct of the American slave" from the beaten down, abused and uneducated view perpetuated throughout our educational systems to one that paid tribute to the people who built this country. "I want all kids – white and Black – to swell with pride when we tell the stories about the American slave." As she listens to and hears from some of the children she's met along this journey, she knows that some of them got it.

What surprised you about your own experience or took you to an unexpected place? I could tell that Ms. Southgate had given this a lot of thought, both during and after the walk. "There is no way even in my wildest dreams, I could have imagined it would grow to be this huge." Though at her core, she "is always optimistic, that [the enormity of the support] was the biggest surprise." The media was remarkable and every town she traveled through, her story was front-page news. Strangers called to offer specific help, encouragement, and prayers. "I know, for a fact, that there are more good people than the ones that get us into trouble or cause problems in the world." Ms. Southgate's surprise turned out to be at the heart of each RVer's experience – that there are more good people in the world than we sometimes acknowledge or think about.

Our conversation moved to another area of importance, that of the connection between storytelling and leadership. I told Ms. Southgate that she is seen as a leader and wondered what her sense of self is when we talk about a leader and leadership. I was interested in how she felt about that. After a long silence, she remarked: “In the beginning, I was shocked.” She remembered being in line for movie theatre tickets when someone near recognized her by voice. She experienced people who would stop their cars, alongside her walking, because they had heard her on the radio. “Because what I’ve done came from a calling and felt so right, I take that [being seen as a leader] very seriously.” Ms. Southgate did not envision this going beyond the walk but it has.

Within months at the end of her walk, Ms. Southgate founded a grass-roots organization to save the last pre-Civil War house in the University Circle area. She never would have known about this house had the Historical Restoration Society not contacted her. One of the invited founding members, Ginger Mook, of this organization was a former schoolmate, some 50 years ago. She and Ms. Southgate were friends in graduate school at Case Western Reserve University but what Ms. Southgate did not know, at that time 50 years ago, was that Ms. Mook was a Ford descendant. The Ford family was anti-slavery activists from the Cleveland area. Where Ms. Southgate may wonder how these things happen, she knows that all of these events have meaning and “it feels like this is the way it is supposed to be.”

Summary

This part of the document provided: a personal experiences in and reflections from walking the Underground Railroad in Bath, Ohio; the data and findings from interviews with my conversation partners, presented as integrated, yet individual

portraits; and revelations from an interview with Joan Southgate, along with reflective comments from the RVers on their experience with Ms. Southgate. Finally, Chapter Six, discusses the implications of what was revealed and suggests possibilities for further inquiry.

VI. FINDINGS AND IMPLICATIONS: RECOVERING THE SACRED

"The challenge of history is to recover the past and introduce it to the present."
- David Thelen

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In this section, I review the purpose of the study, discuss the implications of what was revealed and suggest possibilities for further inquiry. In addition, the concept of storytelling leadership is examined through four lenses: 1) voice, 2) knowledge, 3) intelligence, and 4) experience.

Summary of Purpose

The purpose of this study was to discover more about the power of story, a particular story, and storytelling leadership and its impact on listeners. It looked at what meaning could be derived from understanding the connection between storytelling and leadership. Listening to the story of Joan Southgate and her history making walk of the underground-railroad through Ohio and into Canada and learning about the story's impact provided the catalyst for this study.

In Chapter Two, I introduced the four stances in the meaning-making process as proposed by Langer (1989) and further developed by Carla Zamerelli-Clifford, a reading specialist, and noted an interest in exploring the fourth stance of stepping out and objectifying the experience. Given the time lapse between my conversation partners' experiences in first hearing Joan Southgate talk and traveling with her in 2003 on the last leg of her journey and the interviews which were conducted in 2005, they were able to distance themselves from earlier personal experiences, reflect on and react to the story

and the storytelling experience. This study examined the fourth stance, critical analysis of story, to discern what could be learned about the story listeners' experience.

The qualitative method of portraiture was used to capture the complexity, dynamics, and subtlety of experiencing the untold stories of the underground-railroad, of Joan Southgate, the storytelling leader, and to illuminate the multifaceted dimensions of goodness and imperfection. The individual portraits were shaped and defined through the dialogue of and interaction between the researcher and the conversation partners. This was done through interviews, observations and a collection of artifacts.

Through two pilot interviews, I obtained the following information: 1) preliminary data; 2) confirmation on the appropriateness of the interviewing questions; and 3) validation on the effectiveness of the interviewing technique. Prior to initiating this study, Ms. Southgate's story appeared to outline Palmer's (2004) musings on the yearning to live an undivided life, one that is congruent with an inner truth. During the data collection, I used the contours of Palmer's framework to increase my consciousness about the lens I brought to the study and to open my mind and heart to record the reality encountered.

The next four interviews were recorded, transcribed, and then checked by my conversation partners for factual accuracy. The transcripts from these interviews were read and re-read for theme development. "The development of emergent themes reflects the portraitist's first efforts to bring interpretive insight, analytic scrutiny, and aesthetic order to the collection of data" (Lawrence-Lightfoot & Davis, 1997, p. 185). After writing individual portraits, I used a post-interview questionnaire with each participant to learn whether they sensed "the resonance in seeing their images and experiences mirrored

in the narrative" (p. 260). Joan Southgate's story and storytelling leadership provided the catalyst for this study and was "the overall gestalt of the subject" that determined the "composition of the aesthetic whole" (p. 266). Where each portrait stands alone, they were woven together into yet another story, resulting from the seventh and final interview conducted with Ms. Southgate and having evolved from each unfolding narrative.

The Research Question

What is the impact of story on the listeners and why do they react the way they do was my foreshadowed question. I was also interested in knowing how to apply this knowledge of story and storytelling for a social movement. The sub-question examined in this study was: How can we, as business or community leaders, better connect with those we'd like to influence in some way?

According to Lawrence-Lightfoot (Lawrence-Lightfoot & Davis, 1997), "through documentation, interpretation, analysis, and narrative," the portraitist raises "the mirror, hoping – with accuracy and discipline – to capture the mystery and artistry that turns image into essence" (p. xvii). I analyzed how a particular story had an impact on story listeners and then why and how they were influenced to behave in a desired way. These findings indicated that they were influenced by certain embedded dimensions of life and the qualities of storytelling leadership.

Findings and Implications on Story

First we see the hills in the painting, then we see the painting in the hills.
- Li Li Weng

When I started talking with my conversation partners I used Palmer's (2004) four themes: "the shape of an integral life, the meaning of community, teaching and learning for transformation, and nonviolent social change" as my mental model (p .ix). Phil's interview seemed to speak to a desire to live an integral life while adhering to the dictum of non-violent social change. Through her work with multi-handicapped children and the longing for his daughter to know and better understand her historical legacy, Cindy and Howard, respectively, appeared to align with teaching and learning for transformation. Through career choice and volunteer efforts, Bob's story enhanced the meaning of community. Though there were correlations between their stories and Palmer's (2004) four themes, I did not experience strong connections.

Upon reflection, I realized that I was looking for themes instead of allowing them to emerge. Instead of continuing to force what felt like an unnatural fit between their stories and my mental model, I returned to the essence of portraiture. I was there to witness the story and collaborate in its emergence, not to change it. I pondered over the need to balance, by monitoring and controlling my voice, the framework brought to the inquiry so as not to overshadow the voices of my conversation partners and decided to more carefully listen for voice.

By reviewing the written transcripts, listening to the audio recordings and watching the video recordings again, their voices revealed four universal and timeless dimensions of life – to live, to love, to learn, and to leave a legacy. These dimensions

"represent the four basic needs and motivations of all people" (Covey, 2004, p. 22), are important to the shape of an integral life and foundational to the journey toward an undivided life. "The emergent themes grew out of data gathering and synthesis, accompanied by generative reflection and interpretive insights" (Lawrence-Lightfoot & Davis, 1997, p. 188). More than balancing my desire for control, by developing discrete codes, with the search for meaning, I needed to give up control to deep concentration and careful listening. "The scientist and the artist are both claiming that in the particular resides the general" (Lawrence-Lightfoot & Davis, 1997, p. 14).) The authors explain this process, in part, as moving "closer to the unique characteristics of a person," (p. 14) in order to discover the universal, which in this study was the four universal dimensions of life as described by Covey (2004). Once the theme was identified, my conversation partners recognized its presence and confirmed its importance.

Where these four dimensions are permeable and overlapping, each of my conversation partners could name, through words, expressions and story, a particular dimension. Their stories were a testament to the fact that: "The deepest nature of self are unchanging" (Scharmer, 2000, p. 16). They had an inner ground on which to stand that enabled them to claim, give voice to and nurture true self, speaking their truth from out of the depths of their souls.

> Philosophers haggle about what to call this core of our humanity, but I am no stickler for precision. Thomas Merton called it true self. Buddhists call it original nature or big self. Quakers call it the inner teacher or the inner light. Hasidic Jews call it a spark of the divine. Humanists call it identity and integrity. In popular parlance, people call it soul (Palmer, 2004, p. 33).

I call it the voice of the human spirit responding to the four universal human needs – living, loving, learning, and leaving a legacy – that each of my conversation partners were called to answer.

Being able to say what people have in their minds and hearts encapsulates what occurred between the storyteller leader, Joan Southgate, and story listeners, Bob and Earl. By getting out of his comfort zone, Bob continually exercises his mental muscle fiber for self-mastery and professional competency. His voice is that of a personal vision to grow and develop. Earl, through a disciplined focus, chooses to expand his influence, increase his contribution to and inspire others to find their voice. His voice values differences in people while recognizing their uniqueness and wholeness. Joan Southgate was able to tap into their calling to learn and to live by using their voice wisely in serving others.

Tell me, show me, and involve me is the manner in which Ms. Southgate nurtured her fellow travelers. Allowing people to see something they've not seen before or imagined before is descriptive of Cindy's and Karen's narrative account of their experience with Ms. Southgate. Cindy's heart was broken open by seeing the actual hole where freedom seekers had lain hidden from the slave catchers. That they hid in such small quarters was not new information. That they survived and prevailed under such conditions was an unimaginable pain. The walk with Ms. Southgate provided the focused, silent, and inviting space that led to Karen's expanded view on the freedom of choice. Karen was jolted into thinking about the fear and danger that accompanied the choice to be free and enveloped the walk towards freedom. The will to live, as free human beings, and the need for love, in communal support of each other, speaks to the powerful possibilities of life.

Drawn by love and the need to make a difference, the true self of Howard and Phil address a life of doing well by doing good. Both have been able to find themselves through losing themselves in the service of others. Phil is proactive in accepting responsibility for creating shared meaning and making constructive contributions to people and causes. Howard is able to align his strong spiritual sense in all aspects of his life with his highest values and convictions. Ms. Southgate, through presence and generosity of heart, was an inspiring vision of goodness and regenerative powers. She found hope and invited others to do the same.

These RVers, as well as the many other friends and strangers met along her journey, were touched by her in a way that caused them to want to struggle together for a shared aspiration. From the findings from this study, the shared aspiration was the hope for meeting one of the four universal needs of life, that of living, loving, learning, and leaving a legacy. With both will – to complete the 519-mile journey – and way – through a good story that enabled people to see themselves -, Ms. Southgate inspired hope for meeting these needs.

Story and Leadership

Where Palmer's (2004) book, *A Hidden Wholeness*, "is about tying a rope from the back door out to the barn so we can find our way home again" [in a blizzard], Joan Southgate used story along with the theme of Sankofa, which focuses on the importance of going back to fetch it, to provide story listeners with the sacred space, freedom and sense of security to examine their past, present, and anticipated or desired future.

Their experience with her story was a self-affirming process that allowed them to:

- See themselves as co-creators of life and feel the accompanying responsibility
- Realize or re-confirm their capability to make a difference
- Connect and be in community with kindred spirits (belonging)
- Gain a better sense of self (identification) and personal mission whether it was to live, learn, love or leave a legacy
- Feel pride in the past and hope for the future

Connecting and being in community with others is of principal importance to effective leadership. But it is only after the leader recognizes and responds to her own soul's code that she can help others find theirs and nurture a sense of belonging to a greater purpose. Through Joan Southgate, the storyteller leader, my conversation partners recognized and/or reclaimed their strengths, talents, and gifts and are recommitted to using them to make a positive difference in the part of the world that they touch. They were further liberated in self-knowledge and self-worth. Full of hope and inspired by the hope projected by Ms. Southgate, they felt pride in knowing from where and how far they had come. Where Sankofa teaches that remembering the past is wise so as not to repeat the same mistakes, my conversation partners, in light of present-day challenges and armed with the knowledge of the past, assume responsibility and exude confidence for a better future. Because it is no taboo to return and fetch it when you forget or don't know, Sankofa is a source of power for wise leadership in the effective use of story.

People want to be involved with work that makes a difference and to live meaningful lives that answer fundamental questions of: Who am I? Why am I here? Where am I going? What difference do I make? Story provides a means of responding to those questions. Where people everywhere are in need of connecting with leaders who

are believable, trustworthy, committed, and capable of actualizing positive change, stories offer a compelling means to make sense of a rapidly changing and complex world while making that connection with human beings in deeply personal and meaningful ways. And, where leadership is concerned with meaning-making processes, such as creating shared vision, the findings, from this study, on story suggest that the most important vision may be that of developing a sense of self, a sense of unique mission, purpose and/or meaning and then being able to see one's self as part of the larger picture.

Business and community leaders are routinely met by the uninformed, dubious or resistant audience. At the same time, they rarely have luxury of time to get to know well all of those they'd like to influence in some way. The challenge for these leaders is to be able to bring people to a point of understanding, believing, and acting upon the leaders' message. Their story must clearly speak to what's in it for them – the listeners – at the level of a basic universal need. Connecting at that level is a powerful influence because it informs a freedom of choice based on what the listener feels called and able to do, whether it's meeting a need to live, love, learn or leave a legacy.

Findings and Implications on Storytelling Leadership

A leader's ability to craft a story is not storytelling leadership. For if we don't believe in the messenger, we won't believe the message. There are examples of those who assumed their power through bureaucratic means or traditional authority and through the use of story and storytelling abused their position of leadership. In a search for goodness, this study did not include mention of those type leaders.

Storytelling leadership is the calling of a different kind of leader. It is servant-leadership where one can only serve others out of a healthy self-respect. The operative guideline for storytelling leadership is: Leadership for others is [the only] leadership that matters. It is charismatic leadership where the storyteller leader's gift of grace is in helping others write and maybe complete their own stories. Phil remarked that we may never know why Joan Southgate was able to move people to action, to the point where no other decision but to go with her could be made. The findings from this study suggest that the dynamics of storytelling leadership provide insight into the answer.

Storytelling leadership is a discipline embodied by Joan Southgate. She used story to engender meaning with and for others. As a storyteller leader, she understood and was sensitive to the need for meaning and served others by helping them find personal meaning.

> Everybody can be great because everyone can serve. You don't need a college degree to serve. You don't have to make your subject and verb agree to serve. You don't have to know Plato and Aristotle to serve. You don't have to know Einstein's theory of relativity to serve. You don't have to know the second theory of thermodynamics in Physics to serve. You only need a heart full of grace. A soul generated by love.
> Source: King, C. (Ed.) (1987). The words of Martin Luther King, Jr. New York, NY: Newmarket Press, p. 17.

Leadership uncovered as a form of an individual giving voice to her vocation, her soul's code, is storytelling leadership where that leader has answered the questions: What's my framework for living? What is it that I value? What are my enduring values? The storytelling leader uses voice to integrate the sources of power (knowledge, intelligence, experience) in a matter appropriate for a particular situation. She is able to read the psychology of the context as well as the psychology of self and other individuals who operate in the context. The findings from this study revealed that voice is of primary

importance to storytelling leadership. To a lesser extent, the secondary qualities of knowledge, intelligence, and experience, were touched upon. This in no way diminishes their significance but is reflective of the delimitations of this study. Because the research design primarily focused on themes related to voice, much of the material on knowledge, intelligence, and experience was incidental.

Voice

Finding and articulating one's voice is at the heart of storytelling leadership. Joan Southgate talked about how something told her and how she experienced a visceral moment of truth. There is no one correct way to take this journey towards inner truth. But once voice is found and articulated, those listening recognize the veracity, feel the congruency in emotion, body and voice, and are enabled to find their own truth. Rosa Louise Parks and Harriet Ross Tubman are two examples of the criticality of voice in storytelling leadership.

On December 1, 1955, Rosa Louise McCauley Parks (February 4, 1913-October 24, 2005) was arrested, convicted of violating the segregation laws and fined $10, plus $4 in court fees. Her action, refusing to give up her seat on a Montgomery, Alabama city bus to a white man when ordered to do so by the bus driver, occurred at a time when African-Americans who refused to give up their seat on a bus to a white man could not only be arrested, but even killed. Mrs. Parks, freedom fighter and civil rights worker, stated in an interview: "I have learned over the years that when one's mind is made up, this diminishes fear; knowing what must be done does away with fear" (Retrieved November 7, 2005 from http://womenshistory.about.com/od/quotes/a/rosa_parks.htm).

Mrs. Parks studied and learned about non-violent change. She found her voice and was able to articulate it by living a life of integrity. We were able to glimpse "the beauty that arises when people refuse to live divided lives" (Palmer, 2002, p. 9). Through her life and living, she left a legacy that instructs us to continue the struggle for liberty and justice.

When Mrs. Parks was but one month old, another brave woman went home to rest. Harrriet Ross Tubman (1820/21?-March 10, 1913), sometimes called the Black Moses, led over 300 slaves to freedom on the Underground Railroad. Born a slave, she made 19 trips back and forth, never taking the same path twice. Upon her first crossing from Maryland, where she was a slave, into free Pennsylvania, Harriet Tubman is quoted as saying: "I looked at my hands to see if I was the same person now I was free. There was such a glory through the trees and over the fields, and I felt like I was in heaven" (Retrieved December 26, 2005 from http://historyalive.weac.org/teachers/quotes.htm). Realizing her own freedom, why did she risk it and go back for others? Two quotes attributed to her, I believe, answer this question.

- I had reasoned this out in my mind, there was one of two things I had a *right* to, liberty or death; if I could not have one, I would have the other (Retrieved December 26, 2006 from http://womenshistory.about.com/cs/quotes/a/qu_h_tubman.htm).
- I had crossed the line. I was free; but there was no one to welcome me to the land of freedom. I was a stranger in a strange land; and my home, after all, was down in Maryland; because my father, my mother, my brothers, and sisters, and friends were there. But I was free, and they should be free. I would make a home in the North and bring them there, God helping me (Retrieved November 7,

2005 from http://docsouth.unc.edu/neh/bradford/bradford.html).

Ms. Tubman's "early life as a slave had been filled with abuse; at the age of 13, when she attempted to save another slave from punishment, she was struck in the head with a two-pound iron weight. She would suffer periodic blackouts from the injury for the rest of her life" (Retrieved December 27, 2005 from http://www.civilwarhome.com/tubmanbio.htm). In the face of unimaginable challenges, Ms. Tubman found her voice at an early age. Johann Goethe, as cited in Covey (2004), asserts: "Self-knowledge is best learned, not by contemplation, but by action. Strive to do your duty and you will soon discover of what stuff you are made" (p. 33).

Armed with the knowledge of her true self and belief in her rights, Ms. Tubman chose to engage in work that aligned with her soul's code. The freedom she experienced at the first crossing was not whole or complete because, being communal creatures, she never lost the awareness that we are connected to each other. "The soul wants to keep us connected to the community in which we find life, for it understands that relationships are necessary if we are to thrive" (Palmer, 2004, p. 33). "Her first expedition took place in 1851 (after the passing of the Fugitive Slave Act in 1850)…returning to the North with her sister and her sister's children" (Retrieved December 27, 2005 from http://www.civilwarhome.com/tubmanbio.htm). In 1857, she led her parents to freedom and would spend the rest of her life helping other slaves escape to freedom.

> Once people claim their voices neither they nor the world will ever be the same (Grace, 1999, p. 37). Not all choices involve risk to life. But they are still courageous because of the risk involved in declaring who we are and for what we stand (p. 37). When we engage in authentic behavior over time we develop courage. Then, regardless of the circumstances, we can declare like, like Martin Luther: Here I stand. I can do no other (Bainton, 1950), as cited in Grace, p. 38.

Knowledge

While leaders can tell a good story, effective leaders embody their stories. In similar fashion, though finding and articulating voice is crucial to storytelling leadership, alone it is not sufficient to being an effective storytelling leader. Storytelling leadership relies on full use of self, encompassing the leader's knowledge, intelligence, and experience. Joan Southgate was believable and seen as credible and competent. She knew, as evidenced by my conversation partners, her subject and the context of the situation well.

Various strategies, including "strategic planning, management and leadership development, team building, supervisory development, organizational and group and employee performance management, and principles of organizational change" comprise the tool-kit that leaders must use in order to achieve desired results (Retrieved February 10, 2006 from http://www.managementhelp.org/systems/systems.htm#anchor296937). There is no argument that conceptual knowledge and technical competencies, along with effective, ongoing communications are instrumental to the leader's ability to create shared meaning and make connections.

Because leadership is an inside out job, equally important is self-knowledge, the willingness and desire to take the inward journey and to learn from that experience. It is essential to know how we know what we know. This process of reflection and action leads to the development of metacognitive learning skills which is knowledge, awareness and control of one's own learning. Leaders must think clearly about their experiences, question assumptions, and challenge what they think they know.

Ms. Southgate is a reflective woman and routinely stops and makes time to listen to her inner voice. Further, she thinks about her own thinking. For example, she questioned why she struggled so hard in taking her "usual stay-healthy walk" and stilled herself long enough to receive the answer (Southgate & Stewart, 2004, p. 15). Her practice and behaviors bear striking resemblance to the sources of satisfaction and demands for competence that Schön (1983) describes for the reflective practitioner. They are also vital to the effectiveness of the leader's meaning-making process:

- I am presumed to know, but I am not the only one in the situation to have relevant and important knowledge. My uncertainties may be a source of learning for me and for them.
- Seek out connections to the client's [story listeners] thoughts and feelings. Allow his [their] respect for my knowledge to emerge from his [their] discovery of it in the situation.
- Look for the sense of freedom and of real connection to the client [story listener], as a consequence of no longer needing to maintain a professional façade (Schön, 1983, p. 300).

Intelligence

Whether Palmer's (2004) undivided life or Covey's (2004) concept of the whole person is referenced, the leader must be aware and knowledgeable about her commitments, for we are committed to only what we care about. The intelligence required for effective storytelling leadership extends beyond that of mental capacity or IQ. Joan Southgate exhibited four intelligences, as described by Covey (2004). Mental intelligence refers to vision. Ms. Southgate was a people believer and hopeful. Physical intelligence speaks to the reverence one places on her body. Ms. Southgate was self-disciplined, focused, committed, and willing to sacrifice as she spent 14 months getting her body ready to walk the 519 miles. Her hope, sensitivity, passion, humor and influential nature are attributable to her emotional intelligence and capacity for

connecting and resonating with others. Humble, respectful, inspiring are characteristics of her spiritual intelligence.

Covey (2004) asserts: "Developing and using these intelligences will instill within you quiet confidence, internal strength and security, the ability to be simultaneously courageous and considerate, and personal moral authority" (p. 57). My conversation partners would agree that this statement brilliantly describes Joan Southgate. In Covey's view, developing these intelligences profoundly impacts the leader's ability to influence others and inspire them to find their own voice.

Experience

Experience is described in two complementary ways: 1) the story listeners' experience of Joan Southgate and 2) Ms. Southgate's life-long accumulation and wise use of knowledge and skill. The shape of her experience determined her ability to influence others. It was not based on positional power or authority arising from elevated station, wealth and/or prestige that once acquired can be used improperly.

> Improper influence is that dominion acquired by any person over a mind of sanity for general purposes, and of sufficient soundness and discretion to regulate his affairs in general, which prevents the exercise of his discretion, and destroys free will (Bouvier's Law Dictionary, Revised 6th Edition (1856), Retrieved February 11, 2006 from http://www.thedict.com/definition).

Nor was her influence regulated to customary methods (work directing, coaching, counseling, delegating and selling) of influencing people.

While being in Ms. Southgate's presence and hearing her story, the story listeners could feel the whole of a person, apprehend a thought or emotion through the senses or mind, and know that they were in a space surrounding a great personage. Her personal stories and experiences authenticated the impression fostered by her storytelling. Through

her tone, self-assurance, poise, posture, affectation, calm, closeness and confidence, feelings of extraordinary properties were formed. This was the power of Joan Southgate's voice in all its dimensions. Her influence was spiritual (heavenly and divine) and magical, seemingly requiring more than human power as she gave voice to what her story listeners already knew in their souls.

Where experience is the best teacher, there are some lessons that cannot be taught; they must be lived. Joan Southgate prepared herself to be the change she wanted to see in the world. She used her personal knowledge and experiences, as an educator, social worker, community activist, wife, mother, grandmother and in being a descendant of slaves, with common sense, insight and practical wisdom to answer her soul's calling. It comes as no surprise that the social worker's primary goal, as noted in the National Association of Social Workers Code of Ethics, is to help people in need and to address social problems.

Having found her voice, the more she exercised it, the stronger the resolve to remain a person of conviction. The lessons learned from experiences prepared her for life's journey and the 519-mile walk. She was grounded in her belief, knowledge and experiences that the universe is working together for good.

Leaders convey their stories by the kinds of lives they lead (Gardner, 1995). Because individuals are unique, their life experiences will be different. But with each experience, the opportunity for learning presents itself. The effect upon the judgment or feeling produced by an event, whether witnessed or participated in should be reflected upon for its meaning and personal implications. This is part of the inside-out work for the leader and an absolute for the aspiring storytelling leader.

Findings and Implications on Storytelling for Social Movement

While your heart knows, your head can only suppose.
Use your head to chart the course inspired by your heart.
- Unknown

In walking the path of freedom seekers, Joan Southgate followed her soul's code, listened to the whispers from her ancestors and responded to her heart's plea. She extended the mission of the social work profession in working to promote social justice and social change with and on behalf of clients to be inclusive of everyone but in particular with families. For Ms. Southgate: "Always, in all ways, for me, the story of the underground railroad is about families" (Southgate & Stewart, 2004, p. 28). She continues to deliver her message to schoolchildren, senior citizens, church groups, anywhere she can find listening ears.

From an ancestor's whisper, she was told to "walk" in order to praise the amazing people "who walked hundreds and hundreds of miles running to freedom" (p. 15). She was moved by the shame felt as a young school girl whenever the topic of slavery was discussed and was determined to tell the untold stories because she has "nine grandchildren who need the truth" about "the American slaves who worked so hard building this powerful country" (p. 15). She yearned to tackle the color problem, so she decided to walk, to tell the stories about how slaves, free Blacks, free whites, and Native Americans all worked together for a common good.

Self-admittedly, Ms. Southgate did not have the requisite organizational skills for planning this journey. Always in her heart she knew safe housing would happen but the support for ensuring that necessities were in place came from "a group of 4 women" who

took “care of the basic details, the schedule for the journey, important housing contacts, and the actual route” followed (p. 22-23).

For any leader who wants to effect social change, it’s important to know that a process has been orchestrated that can make the values she cares about the truth for her organization, community, or supporters who, in this case, were fellow travelers. Joan Southgate knew that people had to work together in order to achieve the greater good. Leadership is the process of meaning-making across world views (Drath, 2001) and about creating conditions where people can learn. Ms. Southgate, as the storytelling leader, was the intermediary between story and story listeners and her storytelling the moderator between past and present. Old and new, past and present, and Sankofa, going back to fetch it, were recurrent dynamics in her journey, her story and in the stories of her story listeners. As noted in her book, *In Their Path*: “There is wisdom in learning from the past to build the future through realization of self and spirit” (Southgate & Stewart, 2004, p. 257).

Throughout her journey, she relied on old friends as well as the new. “To cross the threshold as stranger and be graciously swept in as friend” is the way she described her welcome into the homes of new acquaintances who offered safe housing along the way. (p. 23). The RVers were her modern-day station hosts and hostesses and the recreational vehicles her modern-day safe houses. The findings from this study demonstrated how storytelling, which is a communal act, and storytelling leadership, which takes the power of storytelling combined with the voice, knowledge, intelligence, and experience of the storytelling leader, united a group of people with a common

ideology who tried together to achieve certain general goals. The process and the result are characteristic of a social movement.

In the words of Margaret Mead: “Never forget that a small group of thoughtful and committed people can change the world. Indeed, it is the only thing that ever has.” On one of Ms. Southgate’s many visits to an elite, private school in Lyndhurst, a Cleveland suburb, she witnessed a fourth- and fifth-grade musical presentation on their Underground Railroad studies. “These children of privilege got it! They truly understood. In a way that made me want to weep and laugh with joy. So, of course, I did” (p. 259).

At the end of a long monologue, given by “this little white boy,” he pronounced: “For African-American history *is* [emphasis is Ms. Southgate’s] American history” (p. 259). Ms. Southgate was overcome with remembrance of her own self “as a bright fourth-grader” who felt shame whenever the history of slavery was taught. “This,” she thought, “is how we help all of our children to learn” by “sharing the stories of slave families and conductor families and their heroic collaboration” (p. 260). Story holds rich dimensions of life and though it connects in different ways for different reasons, Joan Southgate’s story has become our story.

Her journey began as an idea, a thought that occupied her during a morning walk. Her story grew because it addressed a universal need, whether living, loving, learning or leaving a legacy. Possessing the qualities of voice, knowledge, intelligence, and experience, she was able to say what people had in their minds and hearts, to allow them to see something they’ve not seen or imagined before, to find hope and invite others to do the same. The findings from this study suggest that these are the ingredients for significant change in social conditions and patterns of individual and collective behavior

in a society. As individuals taking the inner journey we learn that co-creation leaves us free to do only what we are called and able to do. We listen to the story, try it on, and ask what does it reveal? Collective behavior deals with events of historical significance, for factual knowledge of these events is required if we are to know how to interpret, order and compare them. Through storytelling leadership, Joan Southgate showed how we can all go back to witness, wonder, and to do “what is right, right now, today” (p. 256).

Conclusions

We know that story is meaning (Bruner, 2002) and that stories capture emotion and reason, hearts and minds; touch the very essence of who we are, what we seek in life, what we have found, how we will use it, and where we want to be (Atkinson, 1995); and parade for all and yet for each (Sobol & Gentile, 2004), honoring the polysemous (many-meanings) and multivocal (many-voiced) microstories (Boje, 2001).

We also know that leaders are managers of meaning (Forster, Cebis, Majteles, Mathur, et. al., 1999). By design and intent, they attempt to influence the actions, beliefs and feelings of others that they might engage in some struggle for a shared aspiration and in this sense leadership is personal. Effective leaders, per Bennis (1996), put words to the formless longings and deeply felt needs of others. Where Burns (1978) understood the following,

> The essence of leadership in any polity is the recognition of real need, the uncovering and exploiting of contradictions among values and between values and practice, the realigning of values, the reorganization of institutions where necessary, and the governance of change. Essentially the leader's task is consciousness-raising on a wide plane. … The leader's fundamental act is to induce people to be aware or conscious of what they feel – to feel their true needs so strongly, to define their values so meaningfully, that they can be moved to purposeful action (pp. 43-44).

the findings from this study revealed that these deeply felt needs are re-enacted in the choices we make to live, learn, love and/or leave a legacy and that we take from story what we need. The findings further suggest that the most important meaning-making process that a leader undertakes is that of developing a sense of self, unique purpose and/or meaning in herself, as well as in others.

Storytelling leadership is personal and offers a powerful means of making meaning and making connections. We know that through storytelling we learn from experiences we have not personally lived; realize that at a cultural level, they serve to give cohesion to shared beliefs and to transmit values (Polkinghorne, 1988); and that we may be transformed to the point where followers becomes leaders and leaders followers (Burns, 1978).

Now we know, having taken from story what is needed, why story listeners, upon hearing or co-creating a story, react the way they do, for storytelling leadership honors sacred callings and raises both the storyteller and the story listeners to higher levels of morality and motivation (Burns, 1978). As Gardner's (1995) research showed that stories of identity were the single most powerful weapon in the leader's literary arsenal, the findings from this study exemplify that storytelling leadership is equally powerful when the story is about a quest for meeting a universal need while in search for personal meaning and identity that aligns with a shared purpose or vision.

It was further revealed that finding one's voice and enabling others to do the same is of primary importance to storytelling leadership. The storytelling leader embodies the story and creates emotional resonance with the story listeners. Gardner (1995) emphasized that the story of a successful leader must be genuine, growing out of their own experience and touching the lived experiences of the story listeners. The findings from this study disclose how the storytelling leader through voice, knowledge, intelligence, and experience is able to say what people have in their minds and hearts causing them to imagine possibilities, to find hope and to share in the struggle for a shared aspiration. An aspiring storytelling leader can no more skip the fundamentals than

can an aspiring musician, painter or pianist. Not only does the time need to be right for the particular story and the story listener open to receiving its power, the storytelling leader must be ready to articulate voice with the requisite knowledge, intelligence, and experience.

Recommendations for Further Research

As already noted, this study was bound by six of the RVers who, after meeting Joan Southgate and hearing her story, decided to accompany her on the last leg of the journey. It would be beneficial to see if the theoretical framework used in this study applied to other story listeners who did not make the journey. By modifying the research questions used with the RVers, a different perspective of the qualities of goodness and imperfection would come forth through their voices.

With the commonality of having reached the age of retirement from work, diversity in age was also absent from this study and it would be interesting to determine if children and/or younger adults connected with the basic universal needs differently than the six RVers or with something else entirely.

Voice, knowledge, intelligence and experience lead to important implications for the concept of storytelling leadership. Of these four, this study was especially telling as it related to voice. This does not diminish the importance of the other three secondary qualities but is reason to recommend further research that would focus on discovering deeper knowledge about their influence on storytelling leadership. I would also recommend using portraiture as a research method with other leaders who exemplify

these storytelling leadership qualities to determine if those same characteristics or comparable characteristics are present.

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APPENDICES

APPENDIX A: Participant Post Interview: Portrait Response

APPENDIX A: PARTICIPANT POST INTERVIEW: PORTRAIT RESPONSE

1. Respond to the narrative portrait. Does the portrait convey an accurate picture? Why or why not? What was most revealing? What was not surprising to find in the portrait?

2. Is there any part of the portrait you would like to change?

3. Summary remarks by the participant

APPENDIX B: Antioch University Ph.D. in Leadership & Change Institutional Review Board (Pilot Study)

APPENDIX B: ANTIOCH UNIVERSITY PH.D. IN LEADERSHIP & CHANGE INSTITUTIONAL REVIEW BOARD (PILOT STUDY)

Antioch University
PhD in Leadership & Change
INSTITUTIONAL REVIEW BOARD
Human Participants Research Review Form
Application

1. **Name and mailing address of Principal Investigator(s):**
   Karen L. Gilliam
   XXXXXXXXXXXXXXXXXX
   XXXXXXXXXXXXXXXXXXXXXXX

2. **Departmental status**

   a. **Student** _X_ **Faculty** ___

3. **Phone Number: (a) Campus**_____ **(b) Home** _xxx-xxx-xxxx_____

4. **Names of Core Faculty Advisor** ___Laurien Alexandre_____

5. **Name & Contact Information of other Program Faculty Involved in this Project**

   a. **Antioch Faculty** ___Jon Wergin, dissertation chair_____
   b. **Others (specify name, institution, email address, phone number)**
   _____
   _____

6. **Title of Project:**_We Take From It What We Need: A Hermeneutic Study on the Power of Story and Storytelling

7. **Source of Funding for the project (if applicable):**
   _____n/a_____

8. **a: Expected starting date for project:** ___June, 2005_____

9. **b : Anticipated completion date for data collection:** ___June 30,2005_____

10. Describe the proposed participants- age, number, sex, race, or other special characteristics. (Up to 250 words)

Pilot participants - Two (2) retired African-American adults, over the age of 60 years who heard Joan Southgate's story of walking the 519 miles of the underground-railroad through Ohio and into Canada and decided to accompany her on the last leg of this journey.

11. Describe how the participants are to be selected and recruited. (Up to 400 words)

The study is bound by those listeners to Joan Southgate's story who decided to accompany her on the last leg of her journey and provide a modern day "safe house" using their recreational vehicles. These participants will be selected from an RVers group known as the Lake Erie Travelers.

Four of the participants are friends and neighbors and two have already agreed to participate in the pilot. This familiarity will aid in making contact with the entire group, which meets regularly on the first Thursday of every month. Post pilot, I plan to request time during one of their meetings to explain the purpose of my research, distribute the informed consent form, and ask them for the honor of their participation. Equally important in building relationships is my willingness to share background information and respond to any questions they may have about my background.

NOTE: If the participants are to be drawn from an institution or organization (e.g., hospital, social service agency, school, etc.) which has the responsibility for the participants, then documentation of permission from that institution must be submitted to the Board before final approval of the project. This document should be emailed or faxed to Chair, IRB Committee, Elizabeth Holloway.

12. Describe the proposed procedures in the project. Any proposed experimental activities that are included in evaluation, research, development, demonstration, instruction, study, treatments, debriefing, questionnaires, and similar projects must be described. Continue your description on following page if necessary. USE SIMPLE LANGUAGE AND AVOID JARGON. Please do not insert a copy of your methodology section from your proposal. State briefly and concisely the procedures for the project. (500 words)

Interviews will be conducted in a private area of the participant's choosing. I will interview each person using the portraiture approach of asking them to tell a story of their experience. I will maintain field notes throughout the entire process (pre – during and post-interviewing), capturing notes on my

thoughts, feelings and inquiries. Each interview will be taped and subsequently transcribed. The transcribed interviews will be shared with the participants so they may check for factual accuracy. Next, I will analyze the stories by identifying emergent themes. After the portraits are written, I will share them with the individual participant. Each participant will be invited to share thoughts, feelings and concerns regarding the portrait and their experiences. Every effort will be made to report findings in a way that respects the participant's voice.

13. Project Purpose(s) and Benefits: (400 words)

The purpose of this project is to conduct an interviewing pilot, using the portraiture approach, for a proposed hermeneutic study on the power of story and storytelling leadership. The benefits are two-fold: 1) to provide an opportunity for the researcher to practice interviewing using the portraiture approach and apply those learnings to the proposed study and 2) to obtain information that will be useful in the meaning-making process and possibly in the identification of emerging themes.

14. If participants in this proposed research may thereby be exposed to an elevated possibility of harm—physiological, psychological, or social—please provide the following information: (UP to 500 words)

a. Identify and describe the possible risks.
NOTE: for international research, please provide information about local culture that will assist the review committee in evaluating potential risks to participants, particularly when the project raises issues related to power differentials.

The possible harm would be that the research method of interviewing might have lingering effects on the participants. The interviews, if done badly, may lead to feelings of anger, discomfort, anxiety and/or self-doubt.

b. Explain why you believe the risks are so outweighed by the benefits described in (13) as to warrant asking participants to accept these risks. Include a discussion of why the research method you propose is superior to alternative methods that may entail less risk.

I will inform participants that in the telling of their stories, they would not only enable me to understand their experiences and communicate it to others, but they themselves could come to a greater understanding of their experiences, enabling them to share their stories with greater clarity and to a wider audience. It could also be possible that the stories may lead to benefit other storyteller leaders who are trying to effect positive change in their communities. The interviews, if conducted effectively, may lead to

new levels of self-awareness, possible changes in life-style, a shifting of priorities of living and/or a recommitment to something of importance in the participants' lives.

I bring a hermeneutic phenomenological orientation to this project. I'm interested in the description of a lived experience, that of the participants listening to an exemplar story, as well as their interpretation of that experience, in particular their reaction or response to the story. The research method selected, portraiture, has been called a people's scholarship in which scientific facts gathered in the field give voice to a people's experience. Portraiture seeks to record and interpret the perspectives and experience of the people being studied, documenting their voices and their visions. Key elements of this method require interacting with the participants with dignity and care and guarding the relationships that are established. The portraitist's voice should never overwhelm the voices or actions of the participants. In honoring the relationship, information that betrays the participants' trust does not find its way into the final portrait. It is a most appropriate method to engage in intimate conversation about lived experience.

c. Explain fully how the rights and welfare of participants at risk will be protected (e.g., screening out particularly vulnerable participants, follow-up contact with participants, etc.).

First, the purpose and benefits of the study will be clearly communicated to potential participants. Second, the questions will not be intrusive. Third, member checking will occur at the conclusion of the interview. The participants will be able to verify the factual accuracy of the transcribed interview. Fourth, member checking will occur with the written portrait. The participants will be able to discern authenticity of voice and resonance with the portrait. At any time, throughout the study, participants will be able to contact me with any questions, concerns or comments.

15. Explain how participants' privacy is addressed by your proposed research. Specify any steps taken to guard the anonymity of participants and/or confidentiality of their responses. Indicate what personal identifying information will be kept, and procedures for storage and ultimate disposal of personal information. (400 words)

I will review with each participant the issue of confidentiality and ask him or her to identify any elements where they feel vulnerable. All participants may come back to me at any other time.

If anonymity is requested, I will remind them that they will have pseudonyms to protect their identity. No real names will be in the report. I will solicit demographic information on each participant to include gender, age and race.

No participant is required to share this information. I will store tapes in a locked file cabinet and destroy them one year after my dissertation is completed. I will store the Informed Consent forms in another locked file in my home work office.

16. **If questionnaires, tests, or related research instruments are to be used, then you must submit a copy of the instrument, or a detailed description (with examples of items) of the research instruments, questionnaires, or tests that are to be used in the project These copies will be retained in the permanent IRB files. Submit documents via email or fax.**

    a. **Please list research instruments, questionnaires or tests here**

        - Interview questions

17. **Submit via email or fax the informed consent statement if one is used. If information other than that provided on the informed consent form is provided (e.g. a cover letter), attach a copy of such information. If a consent form is not used, or if consent is to be presented orally, state your reason for this modification below.**

        - Informed consent form and cover letter attached

18. **Will electrical or mechanical devices be applied to participants?**
    YES _____ NO ___X_

    a. **If YES, describe.**

I agree to conduct this project in accordance with Antioch University's policies and requirements involving research.

Principal Investigator __Karen L. Gilliam _____ **Date** __5/26/05_

Please submit from your FC personal email account

Core Faculty Advisor _____ Date _____

Faculty are requested to send an email indicating their approval of the IRB application submission as representative of the *approved* student's research proposal.

Members of the Institutional Review Board will deliberate and make a decision on your IRB application within two weeks of your submission.

Applications should be directed to: Elizabeth Holloway, PhD, Chair, Institutional Review Board, eholloway@phd.antioch.edu

APPENDIX C: Cover Letter for Pilot Study and Main Study

APPENDIX C: COVER LETTER FOR PILOT STUDY AND MAIN STUDY

Letter to Participants:

June x, 2005

Dear :

As you know, I am interested in the impact of story and storytelling on the listeners and how they react the way they do. I will ask you to talk about first meeting Joan Southgate, about your experience in first hearing her story and your decision to accompany her on the last leg of her trip. I will be talking to you for about 1 hour.

The conversation will take place at a location of your choice, preferably and if desired in the comfort of your own home. Please contact me at xxx-xxx-xxxx by June x, 2005 if you are interested. If you have any questions about the project, please feel free to give me a call.

I will share with you the results of my study. Your name and materials will be kept confidential unless and only if you give permission for me to use your name in my report.

Warmest regards,

Karen L. Gilliam

☐ I am interested in participating in the study.

☐ You may use my name in your report.

☐ You may not use my name in your report.

☐ I am not interested at this time.

_____

Signature

APPENDIX D: Participant Consent Form for Pilot Study and Main Study

APPENDIX D: PARTICIPANT CONSENT FORM FOR PILOT STUDY AND MAIN STUDY

You have been asked to participate in a research study conducted by Karen L. Gilliam, a doctoral candidate in the Leadership and Organizational Change program at Antioch University, Yellow Springs, Ohio.

This research involves the study of lived experience, in particular, the experience upon hearing Joan Southgate's story and the decision to accompany her on the last leg of her trip. I wish to conduct this study with 6 to 8 participants. All participants are over the age of 18.

The study involves, at a minimum, one conversational interview which will be arranged at your convenience and which is expected to last about 1 hour. The interview will be taped. Once the interview has been transcribed, I will share a copy of the transcription for your review. Once the portrait is written, I will also share a copy of the written story for your review. The total time involved in conversational interviews and follow-up should be no more than 2 hours to 3 hours. If there are any follow-up questions, a second and final interview, with your approval, will be scheduled following the same process.

Your name will be kept confidential, unless and only if you give express permission for me to use your name in my report. You will also have the opportunity to remove any quotations from the transcribed interview. In addition, the tapes and all related research materials including the Informed Consent Forms will be kept in a secure file cabinet and destroyed after the completion of my study. The results from these interviews will be incorporated into my doctoral dissertation.

I hope that through this interview you may develop a greater personal awareness of your own experience as a result of your participation in this research. The risks to you are considered minimal; there is only a small chance that you may experience some discomfort in the telling of your experiences. If you do, please contact me at any time at my home (xxx-xxx-xxxx) to discuss your reactions. In addition, you may withdraw from this study at any time (either during or after the interview) without negative consequences. Should you withdraw, your data will be eliminated from the study.

There is no financial remuneration for participating in this study.

If you have any questions about any aspect of this study or your involvement, please contact

Elizabeth Holloway, Ph.D.
Professor of Psychology
Ph.D. in Leadership & Change
150 E. South College
Yellow Springs, OH 45387

XXXXXXXXXXXX
eholloway@phd.antioch.edu

Two copies of this informed consent form have been provided. Please sign both, indicating that you have read, understood and agreed to participate in this research. Return one to me and keep the other for yourself.

_____

Name of participant (please print)

_____

Signature of participant

_____

Date

APPENDIX E: Pilot Study Instructions and Questions

APPENDIX E: PILOT STUDY INSTRUCTIONS AND QUESTIONS

Setting the Tone for the Conversation

It will be important to establish or re-establish a relationship before getting into specific research questions. The nature of the casual conversation will depend upon my familiarity with the participant.

Setting the Stage for the Conversational Interview

I am interested, as you know, in the impact of story on the listeners and why they react the way they do. I will ask you to tell your story about first meeting Joan Southgate, about your experience in first hearing her story and your decision to accompany her on the last leg of her trip. (I then ask probing questions as they tell their story).

Asking the Questions

Question: When did you first meet Joan?

Question: When did you first hear Joan's story? Tell me about that.

Question: What was this experience like?

Question: How did you come to accompany Joan on the last leg of her trip?

Question: What was that experience like (accompanying Joan on the last leg of her trip)?

APPENDIX F: Main Study Instructions and Questions

APPENDIX F: MAIN STUDY INSTRUCTIONS AND QUESTIONS

Setting the Tone for the Conversation

It will be important to establish or re-establish a relationship before getting into specific research questions. The nature of the casual conversation will depend upon my familiarity with the participant.

Setting the Stage for the Conversational Interview

I am interested, as you know, in the impact of story on the listeners and why they react the way they do. I will ask you to tell your story about first meeting Joan Southgate, about your experience in first hearing her story and your decision to accompany her on the last leg of her trip. (I then ask probing questions as they tell their story).