

BALANCING INQUIRY & ADVOCACY

For Engagement, Learning & Equity

“Balancing advocacy and inquiry is one way for individuals, by themselves, to begin changing organizations and systems from within. You don't need any mandate, budget, or approval to begin. You will almost always be rewarded with better relationships and a reputation for integrity.”

If we are among those bold individuals who care about creating more equitable outcomes in and through public education, we must turn to our interpersonal and organizational relationships as a key leverage point for our action. This is because the systems, policies and procedures we encounter and use in our teaching and leadership are social constructions; in other words, they are made up by and between people, and through their interactions and agreements with one another. Similarly, an organization is nothing more and nothing less than a collection of individuals and the policies, procedures, systems and structures they explicitly and implicitly agree to operate within.

Put plainly, it is through these social constructions that we either perpetuate or reduce and eliminate educational inequities. Still, because we have participated in these systems in one way or another from the time we were born, we will feel tightly attached to certain aspects of them; we may go so far as to assume that certain ways of doing things or particular beliefs we hold are *the truth*. This attachment to our ideas and our beliefs keeps us bound to our current ways of doing things, and as a result, keeps our teaching, learning, relationships, and institutions essentially the same. If we want different outcomes, we have to do different things. And envisioning *which* different things to do requires new thinking.

The idea of “balancing inquiry and advocacy” was first proposed by Peter Senge in his 1990 text, *The Fifth Discipline: The Art and Practice of the Learning Organization*. The practice of balancing inquiry and advocacy is intended to expose, or make visible, each person’s thinking, and to open that thinking for examination. Through this practice, we expose and open our own thinking for examination; we also inquire into others thinking in order to better understand their viewpoints and perspectives. Each of us has a tendency, a conversational and thinking habit, to favor either inquiry or advocacy. The intent of this practice, as the name suggests, is to help us *balance* the propensity to assert our viewpoint and the willingness to show curiosity into others viewpoints.

When applied to educational institutions and the bold goal of educational equity, *balancing inquiry and advocacy* has four important purposes:

- ☞ First, by examining our perspective and reasoning, we increase our knowledge and improve our thinking;
- ☞ Second, by increasing our knowledge and improving our thinking, we improve our decision-making, and thus, take more effective action;
- ☞ Third, by unpacking our inferences and assumptions, we gain more accurate knowledge and better understand and improve the conclusions we reach. All of this reduces the amount of unresolved conflict we experience; and
- ☞ Finally, by offering transparency and humility about our own thinking, curiosity into others’ thinking, and improved conflict resolution, we improve and strengthen our relationships.

The protocols provided on the following pages are extensively quoted and slightly adapted from a chapter by Rick Ross and Charlotte Roberts in “The Fifth Discipline Fieldbook” pp. 256 – 259, by Peter Senge. Bolded questions have been added to specifically inquire about cross-cultural proficiency and equity consciousness. Use these protocols verbatim as “conversational recipes,” in order to help you develop the practice of balancing inquiry and advocacy. Once you develop the habit, you will easily be able to begin using your own words and language to continue this practice more naturally and authentically.

PROTOCOLS FOR IMPROVED ADVOCACY

Make your thinking process visible (walk up the ladder of inference slowly).

What to do	What to say
State your assumptions, and describe the data that led to them	"Here's what I think and here's how I got there."
Explain your assumptions.	"I assumed that..."
Make your reasoning explicit	"I came to this conclusion because..."
Explain the context of your point of view: who will be affected by what you propose, how they will be affected, and why.	"The important factors in the context that I see are..." "My proposal/position tends to benefit..(list individuals or groups of people)..and tends to disadvantage..(list individuals or groups of people).. because..."
Give examples of what you propose even if they're hypothetical or metaphorical.	"To get a clear picture of what I'm talking about, imagine you're a student/parent/teacher who will be affected..."
As you speak, try to picture the other people's perspectives on what you are saying.	

Publicly test your conclusions and assumptions.

What to do	What to say
Encourage others to explore your model, your assumptions, and your data.	"What do you think about what I just said?" or "Do you see any flaws in my reasoning?" or "What can you add?"
Refrain from defensiveness when your ideas are questioned. If you're advocating something worthwhile, then it will only get stronger by being tested. If you're missing an important intercultural or equity consideration, it will surface and allow your ideas to evolve to be more sensitive, adaptive, and equitable.	"What might be some unintended consequences for individuals or systems of my proposal/ thinking/ position? What patterns of advantage or disadvantage are replicated or challenged in that scenario?" "What/whose norms/values/assumptions do you see elevated and affirmed in my proposal? Whose perspectives or positions do you see discounted or disregarded in my position?"
Reveal where you are least clear in your thinking. Rather than making you vulnerable, it defuses the force of advocates who are opposed to you, and invites improvement.	"Here's one aspect which you might help me think through..."
Even when advocating, listen, stay open, and encourage others to provide different views.	"Do you see it differently?"

PROTOCOLS FOR IMPROVED INQUIRY

1. Ask others to make their thinking process visible.

What to do	What to say
Gently walk others down the ladder of inference and find out what data they are operating from.	"What leads you to conclude that?" "What data do you have for that?" "What causes you to say that?"
Use unaggressive language, particularly with people who are not familiar with these skills. Ask in a way which does not provoke defensiveness or "lead the witness."	Instead of "What do you mean?" or "What's your proof?" say, "Can you help me understand your thinking here?"
Draw out their reasoning. Find out as much as you can about why they are saying what they're saying.	"What is the significance of that?" "How does this relate to your other concerns?" "Where does your reasoning go next?"
Explain your reasons for inquiring, and how your inquiry relates to your own concerns, hopes, and needs.	"I'm asking you about your assumptions here because. . ."

2. Compare your assumptions to theirs.

What to do	What to say
Test what they say by asking for broader contexts, or for examples.	"How would your proposal affect...?" "Is this similar to...?" "Can you describe a typical example...?" "What dominant cultural norms are elevated or affirmed in your proposal? What other cultural norms are at play and how are they viewed/treated?"
Check your understanding of what they have said.	"Am I correct that you're saying...?"
Listen for the new understanding that may emerge. Don't concentrate on preparing to destroy the other person's argument or promote your own agenda.	
Again, inquire about what has led the person to that view.	"How did you arrive at this view?" "Are you taking into account data that I have not considered?"
Make sure you truly understand the view.	"If I understand you correctly, you're saying that..."
Explore, listen, and offer your own views in an open way.	"Have you considered..."
Listen for the larger meaning that may come out of honest, open sharing of alternative mental models.	
Use your left-hand column as a resource.	"When you say such-and-such, I worry that it means..."
Raise your concerns and state what is leading you to have them.	"I have a hard time seeing that because of this reasoning..."

3. Protocols for Facing a Point of View With Which You Disagree

What to do	What to say
Again, inquire about what has led the person to that view.	"How did you arrive at this view?" "Are you taking into account data that I have not considered?"
Make sure you truly understand the view.	"If I understand you correctly, you're saying that..."
Explore, listen, and offer your own views in an open way.	"Have you considered..."
Listen for the larger meaning that may come out of honest, open sharing of alternative mental models.	
Use your left-hand column as a resource.	"When you say such-and-such, I worry that it means..."
Raise your concerns and state what is leading you to have them.	"I have a hard time seeing that because of this reasoning..."

4. Protocols for When You're at an Impasse.

What to do	What to say
Embrace the impasse, and tease apart the current thinking. (You may discover that focusing on "data" brings you all down the ladder of inference.)	"What do we know for a fact?" "What do we sense is true, but I have no data for yet?" "What don't we know?"
Look for information, which will help people move forward.	"What do we agree upon and what do we disagree on?"
Ask if there is any way you might together design an experiment or inquiry, which could provide new information. Listen to ideas as if for the first time.	
Consider each person's mental model as a piece of a larger puzzle.	"Are we starting from two very different sets of assumptions here? Where do they come from?"
Ask what data or logic might change their views.	"What, then, would have to happen before you would consider the alternative?"
Ask for the group's help in redesigning the situation.	"It feels like we're getting into an impasse and I'm afraid we might walk away without any better understanding. Have you got any ideas that will help us clarify our thinking?"
Don't let the conversation stop with an "agreement to disagree."	"I don't understand the assumptions underlying our disagreement."
Avoid building your "case" when someone else is speaking from a different point of view.	