WANDERING THROUGH THE WILDERNESS:

NAVIGATIONAL TOOLS FOR LIMINALITY

By

Erica Ahlin Montemayor

Submitted to the Program of Organizational Dynamics, College of Liberal and
Professional Studies in the School of Arts and Sciences in Partial Fulfillment of the
Requirements for the Degree of Master of Science in Organizational Dynamics at the
University of Pennsylvania

Philadelphia, Pennsylvania

2020

WANDERING THROUGH THE WILDERNESS:

NAVIGATIONAL TOOLS FOR LIMINALITY

Approved by:

_____

Alan M. Barstow, Ph.D., Advisor

_____

Anne M. Greenhalgh, PhD., Reader

ABSTRACT

Liminality is the state of being betwixt and between and is often characterized by ambiguity, discomfort and uncertainty (Turner, 2011). This concept is discussed and conceptualized as it relates to learning and development in experiential education. The aim is to examine the role of liminality in the context of a wilderness expedition with specific focus upon how liminality generates learning and identify tools to engage within the liminal space. Application of this examination and conceptualization is revealed in the perspectives of selected educators in the field, student reflections and the analysis of the literature discussed.

ACKNOWLEDGEMENTS

LIST OF TABLES

LIST OF FIGURES

TABLE OF CONTENTS

CHAPTER 1

INTRODUCTION

January 2020

    This is an engagement in the understanding of a naturally unfolding process in life. One that is ever changing, from one state to the next. This is an examination of the change of seasons, what takes place when it is not quite winter, and not quite spring. It is the acknowledgement of the shift that takes place before the rain. It is the awareness to the generation of energy that thrusts us into a new way of being. One that we can claim. What we are embarking on is a journey into what is yet to be made clear. (Journal Entry)

    Liminality is the state of being betwixt and between and is often characterized by ambiguity, discomfort and uncertainty (Turner, 2011). An understanding of liminality, the value of this experience and the tools to navigate through it becomes an increasingly important topic as we learn to adapt and endure the ever-changing circumstances of our world. As I write this capstone, I notice how relevant this topic has become as I share a profound example of liminality with many others across the globe – in quarantine. One might imagine how the magnitude of a worldwide pandemic could give us a taste of what it feels like to be *in-between*: the chaos and uncertainty that precludes our sense of normalcy, the ensuing anxiety, and the structures we had that now are falling to pieces. Liminality, without a doubt, can be disorienting, but through this disorientation comes many opportunities. Some of which launch us into creativity where we might be forced to invent new methods of operating or are given the perspective to adapt to

unique ideas. Moreover, in what can feel like the isolating trenches, we may just discover an overwhelming sense of community and a necessary adjustment towards humanity.

I will not be discussing the current global pandemic or our country's civil unrest in this capstone, but I hope you find remarkable connections, tools and insights as I have when writing about this topic. This capstone is about transition and the experience of what it feels like to be in the unknown space. I see value in normalizing and bringing more awareness to liminality not only for those who personally experience it but also for audiences such as groups, teams, practitioners and leaders in our world. As we can see clearly in our current climate, navigating transition, uncertainty, and in this case, liminality has become an increasingly necessary skill to embrace. Particularly, and what I hope to examine further in this capstone is the importance of how we adapt in the liminal space. As I draw this topic closer to my field of work, I notice the role practitioners, such as educators and coaches have in supporting the process of a liminal experience, acting more as 'midwifes' than lecturers. For example, educators may be presented with a learner experiencing liminality as they work to understand a threshold concept (Irving, Wright, Hibbert, 2019). Therefore, educators who understand this liminal space may be able to find the balance between pushing the learner to work through this concept or provide a tool to help the learner grasp the concept. In the spirit of learning, being present to liminality as opposed to rushing out of it provides an opportunity for discovery and is what I intend to communicate with this research topic.

This capstone explores a significant quest in my career as a facilitator of wilderness expeditions. For over a decade, I have led expeditions with several organizations who provide experience-based outdoor learning and leadership programs, which model the Kolb Experiential Learning Cycle (Figure 1).

Figure 1:   Kolb Experiential Learning Cycle

Source: Kolb, 1984

```
                              Concrete
                             experience
                               Feeling

              Accommodating              Diverging
                feel and do             feel and watch

Active                                                  Reflective
experimentation      Transforming    Experience         observation
Doing                                                   Watching

              Converging                Assimilating
              think and do             think and watch

                              Abstract
                          conceptualisation
                              Thinking
```
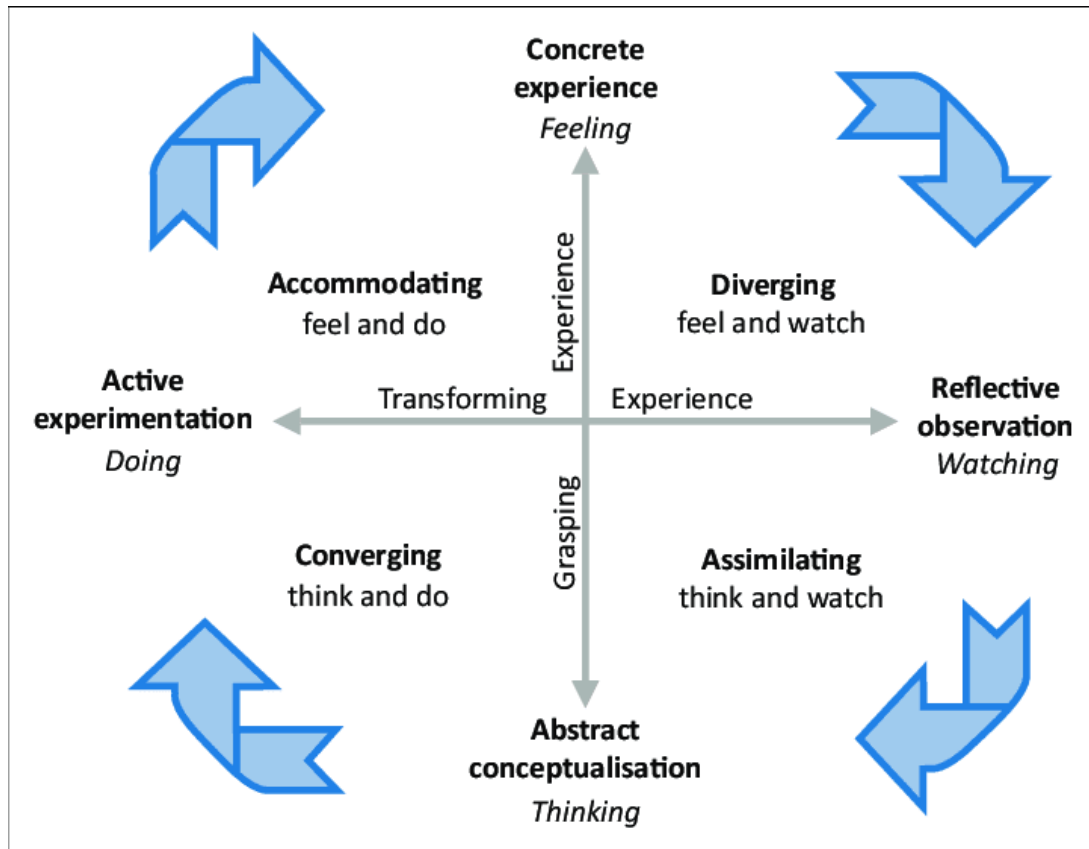
In my experience, I understand the container of a wilderness expedition to be liminal, therefore creating a venue where students and groups may experience powerful transformations. Embarking on many wilderness expeditions as a facilitator has led me to investigate the intricate states of liminality that take place for students during their experience. My capstone explores the concept and experience of liminality from the point of view of participant and facilitator. Indeed, the key contribution of this capstone is my investigation into the role of the practitioner[1] while also gathering an understanding of the participant[2]

---

[1] The term "practitioner" implies *an educator in the field of experiential education leading wilderness expeditions* and may be used interchangeably with the term "instructor," "wilderness guide" or "educator" in this document.

experience. I will examine how experienced practitioners in the field capitalize on the liminal experience while providing supportive tools to enable the participant's learning throughout their journey.

The following chapters will illustrate my capstone using a simple inquiry for 'becoming found' which I have used to guide my students in the field when they are lost and disoriented. The inquiry for 'becoming found' starts at each chapter providing you as the reader the insights and experience of navigating liminality on a wilderness expedition while also setting the tone and forming the chapters of this capstone. Here, I will explain those chapters using this inquiry. To begin the first chapter, *"Where are we going?"* I will open with my background as an experiential educator and include how this topic emerged. Doing so will provide context of the classroom environment where I teach and where I intend to go with this capstone topic. Second, I will answer, *"where are we?"* by providing an overview of the literature surrounding liminality and giving roots to this capstone by defining important terms and concepts. Third, I will address the *"what I know and what I don't know"* to articulate my assumptions on this topic, which include my bias as an experiential educator and my instinctual 'hunches' that might conflict with a neutral examination. The fourth chapter will uncover the question *"how are we getting there?"* as I discuss my methods including my research questions and provide the landscape we will traverse to explore these questions. Finally, I will announce in the chapter, *"found,"* my hopes and discoveries for this capstone that include meaningful contributions to experiential education.

---

[2] The term "participant" implies *an individual or group of individuals who are participating in the wilderness expedition as a learner* and may also be referred to as a "student."

Background

Where are we going?

On an expedition, the most eager question to the start of the day is "Where are we going?" It is with excitement and oftentimes, apprehension that the desired "X" provides a window into the traveler's ambition and for the journey. To commit to the "X" means to accept the entire mission, acknowledging that along the way, doubt and questioning may accompany the quest. The purpose of this section is to provide a window into my background as it describes why this topic is important to me and have chosen this path.

You could say this capstone topic emerged quite literally while climbing a mountain, navigating an unknown trail or any wilderness experience that left me, along with several group members feeling cold, wet, tired and hungry. At some point, participants on my experiential education programs ask themselves, "What will this experience do to me?" "Who am I really?" "Can I do this?" *and if I get out of here alive* "What will I become?" As a fortunate observer and facilitator of immersive group-based experiences, I realized the importance of my becoming a midwife to these delicate states of questioning and transition called liminality. The wilderness expeditions I will be discussing in this capstone are ones that are not for the faint of heart. The design (facilitated by practitioners) combined with a novel setting (a genuine environment of uncertainty), is intended to provide an intensity that launches individuals and groups out of their comfort zone. The path is not to be made easy, seeing that the reward of self-discovery can only be realized when one has discovered it for themselves.

My experience working with groups in these settings vary greatly. I have worked with adjudicated youth, grieving teens, veterans, college students, service workers, educators and

corporate executives. With these participants, I have led weeklong to month long expeditions in environments all over the world and with some of the top leaders and organizations in the field of experiential education. Although these constituents, settings and organizational frameworks vary, the experience consistently promises the return of transformation. I have been eager to use my organizational dynamics journey, particularly this capstone to synthesize the participant and facilitator experiences I have seen over the years. Further investigation of my interest has helped me to narrow my path, pointing to a specific topic that describes the key feature of these expeditions - the process of liminality.

CHAPTER 2

LITERATURE REVIEW

Where are we?

Students on a wilderness expedition often find themselves asking, "Where are we?" The answer to this question often requires an inventory of the facts, including what was previously seen and the current surroundings. Conducting this exploration makes moving forward to the point of interest half the battle. I will explore this section similarly by gathering the literature on the topic of liminality that will create roots for moving forward in this capstone.

Liminality is a broad topic and spreads far and wide in the research world. Therefore, to narrow in on my capstone topic, I have focused my literature review to examine four main components of liminality. These components support the examination of the liminal experience for participants on a wilderness expedition and for practitioners who work with participants in a liminal setting. I find that researching these components will be key in helping me examine my data and provide a scope to draw conclusions at the end of this paper.

The first component is a broad introduction of liminality through the anthropological and psychological research of Arnold Van Gennep (2013) and Victor Turner (1969). These two researchers are the main contributors who popularized the term liminality and lay the groundwork for the concepts and ideas that will be discussed in my literature review. This first

component serves two purposes for my capstone: the general understanding of liminality for myself and the reader, and a structured framework to identify the liminal space. The second component of this chapter will discuss liminality as it applies to community. Specifically, I will discuss the term "communitas" coined by Victor Turner (1969) since it describes the communal bonds that are created during a liminal experience such as a wilderness expedition. This section informs my capstone topic by acknowledging liminality as it pertains to the internal experience and social experience. The third section of the literature review focuses on creativity. This research explores how liminality can generate creative approaches to understanding and adapting to ambiguity (Payne, 2012). By exploring the wonders of liminality described by researchers like Prashnatham & Floyd (2019), I will be able to discuss the idea that through uncertainty can come innovative thinking. I connect these ideas to my capstone topic because as participants approach problems on a wilderness expedition, they are forced to be creative with their resources (or lack thereof) to make important decisions. The final section of the literature review examines the research on the emotions and sensations one can experience when encountering liminality (Hawkins and Edwards, 2015). As I interview research participant's experience of liminality on an expedition, emotions and sensations will be important participant data for understanding.

Liminality - Broadly

Arnold Van Gennep and Victor Turner popularized research on the topic of liminality in the 1900s. These anthropologists understood that the liminal period exists between a set of structures. Van Gennep, who launched the concept of liminality, theorized that the liminal period takes place within the structure of a rite of passage. This structure has three parts – Separation, Liminal Period, and Re-assimilation as depicted in Figure 2.

Figure 2:   Van Gennep's Liminality Framework
Source: Van Gennep, 1909

Separation stage Preliminal rites	→	Transition stage Liminal rites	→	Incorporation stage Postliminal rites
separating from previous identity		transitional period		incorporating back into social world after transition
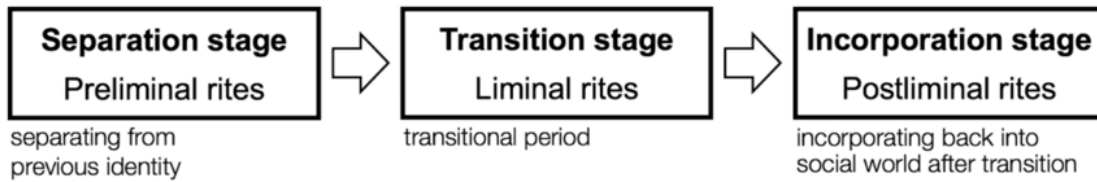
Rites of passages are ritualistic transitional periods marked by "special acts" enveloped in ceremonies (Van Gennep, pg. 24). According to the anthropological works of Van Gennep and Turner, rites of passages provide a societal landscape for individuals to traverse to new social situations. These transitions are made up of a succession of stages with similar ends and beginnings: birth, social puberty, marriage, fatherhood, advancement to a higher class, occupational specialization, and death (Van Gennep pg. 24). Van Gennep explored the individual's experience through his three-part structure to discover the transformation from one phase to the next. In his terms, "initiates" undergoing the rite of passage would find themselves removed from their original social status (separation), launched into a period of transition (liminal period) and then re-entered into a societal structure with a new identity (re-assimilation). In his later research, Turner's approach to liminality shifted as he developed the term "liminoid." For Turner, a "liminoid experience" was a condition serving as a transitional moment in time. This state of being betwixt and between socially established categories did not necessarily result in a change of status (Turner, 1995). Neumann, described this condition as one of being suspended or even trapped between two different sets of role expectations, a condition often leading to impassivity, or even to a social impasse (Neumann, 2012). In review, for anthropologists, Turner and Van Gennep, liminality implies ambiguity concerning the individual's identity and the space occupied during transition. For Van Gennep, the liminal realm has few or

none of the attributes of the 'before' and 'after' states. He views the liminal process as ritualistic, beginning with a 'triggering event' and conducted in specific places for a specific period of time (Beech, 2011). Turner extends this conceptualization by describing the liminal person to be socially if not physically invisible; in other words, they do not fit the societal definition of being "complete' and as Beech puts it, "not-boy-not-man" (Beech, 2011).

Having defined the frameworks of the two leading researchers on liminality, I will explore concepts and ideas that contribute to the liminal experience. The following segments contain important understandings in regards to the involvement of individuals, groups and their experience related to this capstone topic. The research builds on earlier work, along with others who have explored from these important underpinnings.

Community

For participants on a wilderness expedition, community becomes an essential component of individual and group transformation. Notions surrounding community become realized for participants before, during, and after the expedition. These notions are the communities or social structures and identities the participant holds prior to the expedition, those that are created on the expedition (which are explored), and finally, those that one "shifts" after the expedition upon returning to their original communities "at home" (job, school, home, etc). According to Turner, these phases of examination would be called "preliminal," "liminal," and "postliminal." Therefore, the role community plays in the liminal experience becomes a necessary understanding for this capstone. The following section describes the research surrounding liminality as it pertains to the communal experience.

Liminality applies to both the individual's internal experience and social experience. The social structure and community surrounding the person undergoing liminality is a necessary factor in the liminal experience. For example, to lose one's former symbolic status implies liminality. If we circle back to the three-stage pattern ritual, the emphasis on societal constructs and community are explained by Skjoldager and Edelman (2014):

> Van Gennep and Turner noticed a three-stage pattern in these rituals. First was what Van Gennep called "rites of separation": the initiands has their social identity stripped from them, and they were frequently isolated from the rest of the community. This was symbolic death; by losing their social identity, the initiands become dead to society, and is ordinarily characterized by both a strict adherence to a program of action (sometimes seen as a test) enforced harshly by a tyrannical master of ceremonies, and a sense of impersonal, unstructure, but hugely potent commonality amongst the group of initiands that Turner called "communitas." The third phase ("rites of incorporation") is a symbolic rebirth, where the initiands are invested with their new identity and re-integrated into society in their new roles (p. 34).

The term, *communitas* coined by Victor Turner describes the communal bonds that are created among initiates. These shared experiences of transition reflect both the powerful journey of the individual's liminal experience and community's experience. Turner (1969) notes that liminality implies that one must experience the high in order to understand that the low exists. These moments of experiencing highs and lows within a group constitutes the idea of communitas – the shared experience. Individuals within a group who embark on a wilderness expedition may experientially engage with highs and lows and transitional spaces uniquely. Together, they are on the same journey from point A to point B, but each individual group member encounters liminality from a different perspective and at different moments. This is not to say that the group's shared experience of the process does not contain interconnectedness among individual group members. In fact, E. Turner (2012)

describes shared encounters of communitas as "immediate and genuine sense of the other" (p. 6). Extraordinarily, communitas can bring even the most seemingly incompatible individuals together through a shared experience like a wilderness expedition. The research of Turner, Abrahams and Harris (2017) explores the ability for communitas, because of its unstructured nature, to catalyze equality amongst members of the shared experience.

Figure 3:   Communitas Through Rite of Passage
Source: Adapted from Turner, 1969
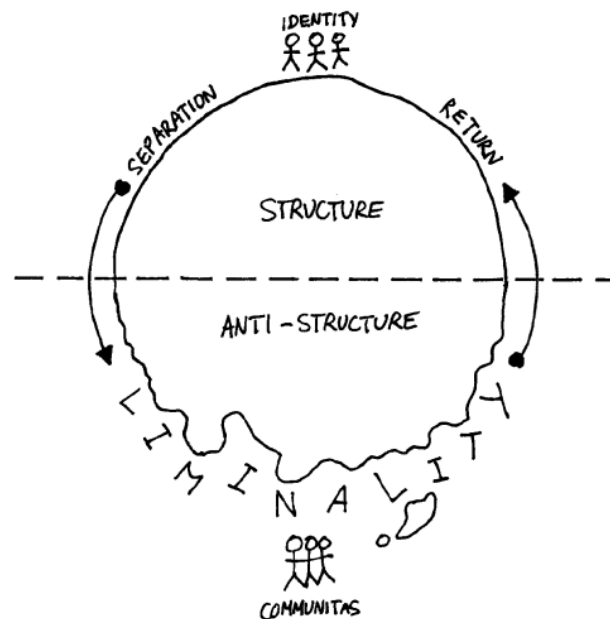
Buechner, Dirkx, Konvisser, et al (2020), research the states of liminality and communitas as it relates to transformative learning. The following from their study is considered as it identifies the role of group transformation:

> Collective transformation as an emergent and shared worldview shift is grounded in a shared experience. The participants might not be fully aware of or even able to describe this experience until they engage with it at the interpersonal level (p. 87).

Percival Goodman and Paul Goodman (1960) identify the benefit of temporary communities such as those that take place on a wilderness expedition. The communitas do

not withstand, and therefore "in disintegrating, they irradiate the society with people who ...

do not forget the advantages but try to realize them in new ways" (P. 109). Buechner,

Dirkx, Konvisser, et al (2020) further investigate these individual changes and personal

realizations through reflection of the liminal experience. Just as individuals suspend and

examine their own social status and perceived limitations during the liminal experience, the

group simultaneously examines itself as an identity as well. When we think about the

group's identity, we can apply the lens described by Gareth Morgan in *Images of

Organization*. Morgan's metaphor of "organization as organism" plays with the

interdependence between individuals, their formation as a group and the environment

where they exist together. Morgan's perspective helps to provide clarity surrounding the

existence of an identity held by the individual and an identity held by the group. On a

wilderness expedition, the identity of the group emerges through the liminal experience

"which creates a shared sense of marginality, resulting in intense solidarity and

togetherness" (Buechner, Dirkx, Konvisser, et al (2020). Within the group, the social status

is "leveled" and therefore members are able to play with different social roles and

identities. According to Winnicott (1960),

> when the members act as a cohort, the group itself provides a kind of container or
> holding environment, thus enhancing the students' ability to engage with their identities
> as learners."

Creativity

I understand the liminal space to be one that inspires creativity and unique

understandings. When a group or individual finds themselves in liminality, new ways of

thinking begin to surface - whether out of necessity or as a catalyst of a "disorienting

dilemma." (Mezirow, 1991). The concept of transformative learning, originated by Jack

Mezirow, is an important one to note because liminality brings about opportunities for what

Mezirow describes as "perspective transformation" in which individuals can experience a

shift in their worldview and aspects of the self. Mezirow's *Ten Phases of Transformative*

Learning provides a window into the creative action students may experience on a

wilderness expedition.

Figure 4:   Mezirow's Ten Phases of Transformative Learning
Source: Mezirow, 1978

Mezirow's (1978a, 1978b) Ten Phases of Transformative Learning

Phase 1	A disorienting dilemma
Phase 2	A self-examination with feelings of guilt or shame
Phase 3	A critical assessment of epistemic, sociocultural, or psychic assumptions
Phase 4	Recognition that one's discontent and the process of transformation are shared and that others have negotiated a similar change
Phase 5	Exploration of options for new roles, relationships, and actions
Phase 6	Planning of a course of action
Phase 7	Acquisition of knowledge and skills for implementing one's plans
Phase 8	Provisional trying of new roles
Phase 9	Building of competence and self-confidence in new roles and relationships
Phase 10	A reintegration into one's life on the basis of conditions dictated by one's perspective

For a group of individuals on a wilderness expedition, leaning into the uncertainties

and allowing for shifts in perspectives may open doors to new understandings.

Additionally, according to Payne (2011) learning the art of embracing this ambiguity

allows for creativity and solutions to emerge. She explains this process from an artist

perspective:

> One must be free from the anticipation of any known outcome to allow for the
> potential arrival of the unexpected. It is risky to invite the unexpected. It may
> not arrive or it might be awful when it does. But in this state of mind where
> receptivity and activity dovetail, might a change merging of these polarities
> result in a spark of inspiration… (P. 190)

As an example, this typical scenario often occurs in the wilderness with a group of

participants.

Scenario:

The scene begins with a group traveling for several hours in the backcountry. Conversations are being had amongst the group members to pass the time while hiking and the attention of the direction of travel has been lost. The sun begins to set and at one point, a member says, "are we headed in the right direction?" Another member follows with, "who has the map?" At this point, the anxiety of the group heightens and all of a sudden, individuals have their heads on a swivel as they negotiate their surroundings. The scene ends with the entire group pouring over the map as the roles and responsibilities of the group become increasingly blurred. The state that launches the group into creativity comes from a sinking realization of two possibilities: One - they are entirely off course, or two - completely lost. After this "disorienting dilemma," what happens to the team during this moment of liminality is crucial and several opportune moments can occur. For example, on an individual level, this liminal space might be the opportunity presenting itself for quieter members of the team to speak up and share the creative ideas they have been holding back. On a group level, this might be the catalyst that shapes the group into a high performing team as they learn how to prototype solutions and clarify roles and responsibilities.

Traversing this threshold has been described as an exhilarating experience, as an intensified awareness of 'being alive' (Payne, 2011). However, as described by Prashantham and Floyd (2019), navigating challenges in a liminal space can present as a "*double-edged sword...* The experience can be both liberating and confounding" (p. 516), Additionally, Prashantham & Floyd identify that

This results from the temporary suspension of social constraint. To the extent that such liberation leads to an edifying activity and a time of bonding among transitioning actors, this can be seen as an educative and novel experience (p. 516).

Further, Turner (1967) describes liminality as "a realm of pure possibility whence novel configurations of ideas and relations may arise" (p. 133).

Emotions & Sensations

"Liminality is a busy metaphor. There is a lot going on at the threshold" (Payne, 2011, p. 192) and is therefore important to explore what is present cognitively and behaviorally for the person experiencing liminality. Emotions and sensations that occur during the liminal process is a natural part of the experience. Emotions are a feature of the liminal space by way of disrupting pre-existing understandings and identities (Cousins, 2006). Doubt, anxiety and confusion are several negative emotions that present during the liminal phase (Hawkins and Edwards, 2015). However, what usually precedes these emotions is a cognitive dissonance often caused by the triggering event. What results after this event is a sensation known as tension and not one that is unfamiliar to the liminal experience. *Tension* can be described as an "inner striving, unrest or imbalance often with physiological indication of emotion" (Tension, n.d.). When an individual or group experiences tension, they acknowledge incongruity. Tension serves several purposes for the person experiencing liminality. The first is to experience something similar to how artists utilize the word tension when creating a masterpiece. Payne (2011) articulates

> Painters and sculptors often use terms such as 'push and pull' and the 'tension' of positive and negative space and of shadow and light. More than an emotion, a sensation or state of 'being' is expressed through these techniques (p. 193).

Tension draws the viewer or in this case, the liminal person to take notice of an experience

outside of the expected by inviting the individual's attention. On a wilderness expedition,

the sensation that has the group or individual admit either vocally or internally,

'something's off.' For context, I will use the example described in the section on creativity.

Tension can often begin to arise when the group acknowledges the aspect of time; the

setting sun, the limited amount of daylight until nightfall, the hours that have passed since

someone has checked the map, the last time a meal was eaten. Suddenly, the expectation of

arriving at camp before dark has changed and the group members begin to enter a liminal

space – not knowing where they are and certainly not where they want to be. The lessons

that *tension* communicates to the person experiencing liminality is invaluable, often heard

as the screaming whisper that says, 'pay attention.'

According to Prashantham & Floyd (2019), liminality may also be confounding.

This confusion is due to the uncertainty accompanying liminality given that it is a state of

crossing over a precarious threshold. Thus, in a liminal state, actors may be vulnerable to

cognitive inertia and panic. Cognitive inertia pertains to "the tendency for a particular

orientation in how an individual thinks about an issue, belief or strategy to endure or resist

change" (Cognitive inertia, n.d.). Cognitive inertia can play out in many ways and evolve

into a sense of *stuckness*. Often, the sensation of being stuck resembles this scenario in the

following progression: An individual or group encounters a 'disorienting dilemma,' the

intensity of the dilemma triggers panic and anxiety and begins to cycle for an extended

period of time (Mezirow, 1991). The seemingly never-ending cycle begins to morph into

feelings of helplessness, doubt (Irving & Wright, 2019) or worse, a lack of desire to explore

opportunities and creativity in the liminal space. As a facilitator of the types of experiences

I provide students, I recognize these delicate states of liminality can be critical to the development and learning of the individual or team. The moments of 'not being able to see the light at the tunnel' has its place for participants in the liminal space, but they can also pose a slippery slope for practitioners who are helping to create this space as a learning environment.

Not all emotions are a negative feature of liminality. Positive emotions may arise if the liminal person or group feels excitement and anticipation at the possibilities for new experiences (Irving & Wright, 2019). Some individuals or groups may negotiate the liminal space more productively. Doing so does not eliminate negative emotions or sensations, but rather through the ambiguous process dawning a perspective, that brings feelings of hope and expansion. With this perspective, one can see the windows of transformation by stepping out of the liminal space and into a new way of being.

CHAPTER 3

METHODOLOGY

How are we getting there?

When the "X" is designated, the succeeding question quickly becomes, "how are we getting there?" On a wilderness expedition, this question is more dynamic than charting a path on a map. The question being asked is one that reflects the group's ability along with other circumstances and factors that may affect getting to the final outcome. Similarly, in this section, it is important that I choose the best method for my participants to explore the data for my research.

The study aims to explore the liminal experience for participants on a wilderness expedition, thus informing how practitioners facilitate this experience to support the growth and learning of their participants. Investigating these two lines of inquiry serves to identify the following: key traits of liminality (what takes place for participants within the space), and tools for practitioners (operators within the space) who use the experiential learning process and a complex environment to invoke a liminal experience.

To capture and analyze my data while addressing my research questions, I acted as the 'practitioner as researcher' through the use of what Cochran, Marilyn & Lytle (2015) call in their book, *Inquiry as Stance*, "practitioner inquiry" (p. 39). Below is Cochran, Marilyn & Lytle's model which incorporates the action research study used in this capstone.

Figure 5:   Practitioner Inquiry Model

Source: Cochran, Marilyn & Lytle, 2015

PRACTITIONER INQUIRY				
Action Research/ Participatory Action Research	Teacher Research	Self Study	The Scholarship of Teaching	Using Practice as Site for Research

↘   ⬇   ⬇   ⬇   ↙

COMMON CHARACTERISTICS:

- Practitioner as researcher
- Assumptions about links of knowledge, knowers, and knowing
- Community and collaboration
- Blurred boundaries between inquiry and practice
- New conceptions of validity and generalizability
- Systematicity, including data collection and analysis
- Publicity, public knowledge, and critique

⇧	⇧	⇧	⇧	⇧	⇧
The knowledge critique	The methods critique	The science critique	The ethics critique	The personal/ professional development critique	The political critique

Using practitioner inquiry through action research provided the feature to be able to "simultaneously take on the role of both researcher and practitioner" and "to participant in the inquiry process as a researcher working from the inside" (Cochran, Marilyn, Lytle, 2015, p. 41). Practitioner inquiry, with the duality of this capability, supported an action research study using a methodology that included interviews with two subject samples. The first set is made up of individuals who have participated in a wilderness expedition within the past two years. The second set is experienced practitioners with at least five years of experience facilitating wilderness expeditions. These two subject samples were drawn from several different experiential education organizations who provide wilderness expeditions. In doing so, I cast a large net to capture varying experiences of both participants and practitioners from which to

draw themes of the liminal experience. My intention is not to compare and contrast the program structure and framework of these organizations; therefore, no names of participants, practitioners and the experiential education organizations are disclosed.

Data Collection

Participant Sample Subjects

I identified five participants to interview for this study. Of the five, all had expressed a willingness to share and reflect on their experience with me while also being recorded for documentation. Using a semi-structured interview process, I was able to build rapport and engage in a conversational style interview that helped my participants share their personal narrative. This style of interviewing also gave me the flexibility and latitude to probe my participants for additional details and encourage their reflection regarding certain moments during their expedition. My interview questions (see appendix IV) guided the participant's narrative of their experience from pre-expedition, during the expedition and post expedition. As the participants told their story as they remembered it, I tracked moments where themes arose, where liminality was described (ambiguity) and experiences that reflected components of my literature review (community, creativity, emotions & sensations).

Practitioner Sample Subjects

The practitioners selected for this study have a wide variety of experience leading expeditions and knowledge in the field of experiential education. The practitioners involved in this study were not the expedition facilitators of any of the participants interviewed in this study. My intention was to provide data from interviewees that would be unique and varying in experiences of one another while also honoring their perspectives. Appreciative inquiry was the

method used when interviewing the practitioners. This method was chosen for two reasons. The

first was to encourage and recognize the practitioner's candidness towards the success and

optimism for the field of experiential education. When you speak with a practitioner in this field,

what is often expressed the most are the powerful transformations that occur within the groups

and participants during the experience. The second strategy using this method was to enable

practitioners to expound on their tacit knowledge acquired while operating in a liminal space. A

semi structured interview is used with the research practitioners to facilitate the appreciative

inquiry (interview questions found in appendix V).

CHAPTER 4

DATA COLLECTED

Before I describe how data was collected for this study, I will note that the original data collection strategy shifted greatly during this capstone study due to the response to COVID-19. Ironically, the process of adjusting the study sent me into a liminal space and further drove my empathy for the liminal experience and my curiosity for the topic. In this section, I will describe the original study to provide context for the original intent, and then describe how the study was modified to collect the data and continue with the goals of the capstone. In doing so, I hope to provide an opportunity for myself or other researchers to explore my research questions using these data collection methods.

Pre-COVID-19 Strategy

Through my relationship with a local experiential education organization, I was able to identify and secure an opportunity to deliver my study to a group of apprentice instructors during their wilderness field training experience. The group of eight participants (trainees) along with their three field practitioners (trainers) willingly participating in a briefing I delivered about the study and signed waivers to participate. Participation in the study included the participant and practitioner's submission of the following data: a pre-field experience baseline questionnaire, a reflective questionnaire during the experience to be completed at the end of each day and a post-field experience questionnaire. Each research participant including the practitioner research participants were administered a data collection field notebook with a unique participant number. The notebooks included all of the questionnaires and were to be collected after the wilderness

expedition for analysis. The original questionnaires for this research strategy are be found in the appendices section (see appendix III). Upon the morning the group was set to depart for the field and begin their expedition experience, the organization made a last minute decision to cancel the training in response to the growing pandemic crisis.

COVID-19 Response Strategy

As the researcher, I worked to assess and salvage any opportunities I had set up from the original study. The ability to collect "in the field" data during the pandemic would not be possible in the foreseeable future given the strict social distancing guidelines. My plan for data collection moved towards a model which captured participant's and practitioner's reflections via interviews in which they recalled their experience(s) on a wilderness expedition. I modified my original questions so that they would elicit more reflective, open-ended responses from research participants who, I hoped, would share their narratives and thoughts more freely. My interviews took place over zoom and phone calls given the mandated quarantine, and I documented my data via recordings and note taking when possible. From a meta-perspective, I realized that needing to change data collection methods in mid-stream put me in a liminal space as a practitioner and researcher reflecting on my own experience.

Research Participants & Context

Given my relationships and connections with several experiential education organizations, I was able to secure five research participants and five research practitioners from different programs rather swiftly. For confidentiality reasons, I will not share the names of the organizations or participants in this study. It is important that I note that the research participants and practitioners have experience with different experiential programs. These programs have

varying frameworks that I will not define in this study because I am choosing to look at a broader

view of liminality and not the nuances of the program structure. However, I will note the

broader framework that these expeditions have in common which follow the Kolb Experiential

Learning Cycle (see figure 1).

CHAPTER 5

DATA INTERPRETATION

The data interpreted honors and reflects the personal narratives and viewpoints of the five research participants and instructors. As the researcher and practitioner, I joined my research participants on their journey of re-telling their stories through my interview questions. The landscape that I am traversing with them is highly dynamic and contingent on various stimuli and circumstances not limited to: environmental factors, inter and intra personal relationships, team dynamics, physical abilities, cultural differences, and life circumstances contributing to world views (meaning making). Interpreting this data in a definitive way would only undermine the lived experience of the interviewees. In collecting and interpreting this data, I share the sentiments of Gillian Maimon, a Philadelphia public school teacher describing her challenges of articulating her classroom environment in *Inquiry as Stance* (2015), "writing about my classroom is a way of trying to know what can never truly be known" (p. 214).

Several themes have emerged given the stories that have been shared as participants and practitioners navigate their liminal experience on an expedition. The first theme that emerged came from the participant's and practitioner's need to create a container for the experience which I will call "structure." During my virtual interviews, I noticed several times when the hands of my research participants were cupped together as if they were holding the space we were discussing. Although they could not articulate the liminal space with words, the validity of its existence was clearly something transformative and valid. As they dove deeper into their stories of their experience, I began to hear key moments of liminality in which their stories described

transformation. The moments shared took shape through several themes of hardships, feelings of being stuck, realizations, and opportunities and disappointments. Notability, the years' worth of reflection since the participant's experience allowed for more clarity during the interviews. The following sections in this chapter outline the data collected. I use the practitioner data to communicate the intentional design of the liminal experience during the expedition while incorporating the participant data to communicate the effects of individual's and group's liminal experience during the expedition. I use my personal experience as a practitioner to act as the researcher to synthesize the data into stages of the liminal experience in the expedition container.

Building a Container

The role of structure in a period of liminality was illuminated in both responses of the participants and practitioners. Given the uncertain environment of the wilderness, creating some certainties during the expedition experience deems to be useful tools by the research participants. As one instructor puts it, "There is enough weirdness going on that it gives them (participants) something to lean on - to know they can count on it." Most of these certainties and structures evolved from ensuring that group and individual basic needs (Maslow, 1943) could be met.

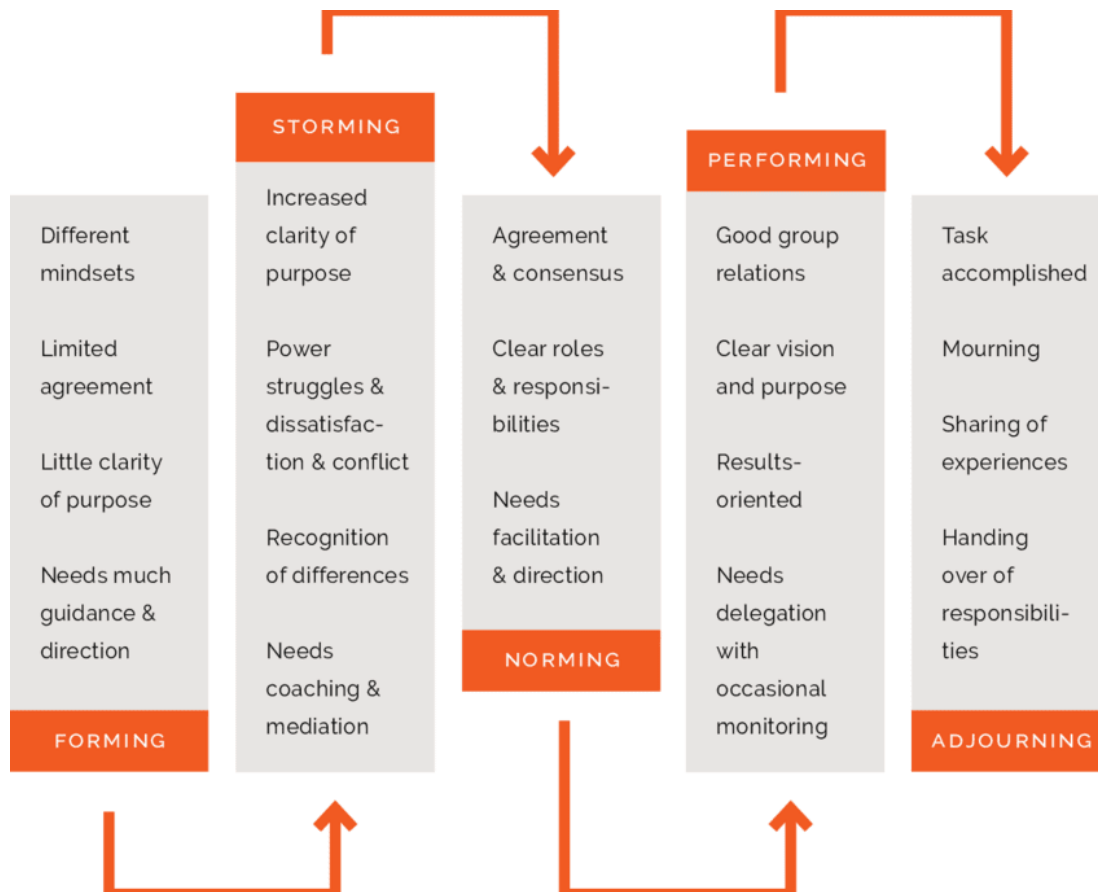**Figure 6:   Maslow's Hierarchy of Needs**
Source: Maslow, 1943
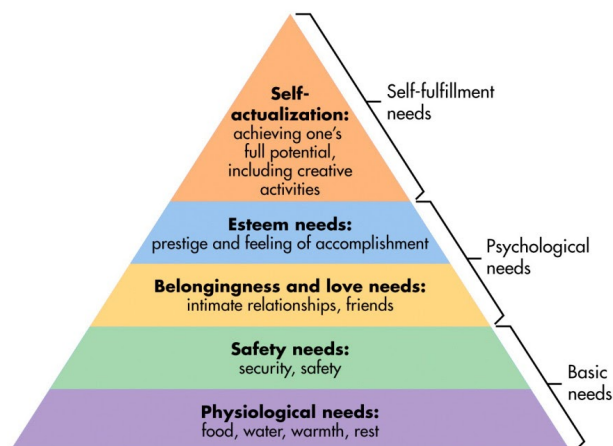
Participants identified needs Maslow's pyramid that varied from basic needs to self-fulfillment needs. Some participants recalled their initial uncertainties about surviving in the wilderness for several days with a new group of people. Some participants expressed a fear of their most basic needs, "I wasn't sure I was going to be able to sleep outside or stay warm," and "I thought we were going to run out of food." Participants realized during their expedition, with the support of the practitioner's teachings, that they were able to control some of these aspects with an openness to learning new skills (backcountry techniques), planning and communication. Another participant states, "you just learn the ropes because you have to adapt quickly." A practitioner adds to the perspective of learning in these types of contexts. "Sometimes, I think the uncertainty piece gets overwhelming for folks and they just need a few handrails to stay in a functional learning mindset rather than go into fight or flight mode."

Staying with Maslow's pyramid, several instructors identified the use of structures to fulfil other needs such as those that are psychological and self-fulfilling. Learning to support the needs of participants in these areas are more intricate and require more of the "soft skills." For example, one instructor describes the importance of creating a structure for group processing and learning by creating a space for psychological safety. "I set the tone for after action reviews by helping the group create ground rules for sharing. This provides the ability for people to be able to access their feelings and emotions in a safe space."

Seasoned instructors who lead wilderness expeditions with groups rely heavily on tools that will help to provide structure and understanding of the group process. Many of these structures exist in the form of frameworks and models such as Tuckman's Stages of Group Development (1965) pictured below.

Figure 7:   Stages of Group Development

Source: Adapted from CULCokpalad, 2015

FORMING	STORMING	NORMING	PERFORMING	ADJOURNING
Different mindsets	Increased clarity of purpose	Agreement & consensus	Good group relations	Task accomplished
Limited agreement	Power struggles & dissatisfaction & conflict	Clear roles & responsibilities	Clear vision and purpose	Mourning
Little clarity of purpose	Recognition of differences	Needs facilitation & direction	Results-oriented	Sharing of experiences
Needs much guidance & direction	Needs coaching & mediation		Needs delegation with occasional monitoring	Handing over of responsibilities

Tuckman's framework provides a window for instructors and participants to understand the naturally unfolding process within the group in the liminal space. Instructors refer to this structured framework as a tool, guiding their implementation of activities and abdication of knowledge and responsibility to the group throughout the expedition. One instructor speaks to the importance of the group formation during the early stages of the expedition. "Breaking the ice and conducting team building activities in the beginning of the expedition. This goes a long way and helps to set up the group for the anticipated ambiguity they will navigate later on." A participant affirms the importance of this introductory phase stating, "The instructors did a great job of breaking the ice and getting us acquainted - we were all from different places in life and knowing that made it easier to be myself and dive into the unknown."

Using Tuckman's model as a frame, one instructor mentions the importance of the adjourning phase as a crucial part of a transformative experience: "A good facilitator knows they eventually will need to wrap it up - understanding the transition space from one normal to a new normal." This instructor acknowledges the importance of ending the experience in order to give way for a new beginning to emerge. He continues, "Closing the experience… It's like a funeral - it's an end to something important that deserves closure." Researchers Chip and Dan Heath (2017) describe in their book, *The Power of Moments: Why Certain Experiences Have Extraordinary Impact,* these transitional moments to provide structure and shape so that they can be held, carried and given meaning. Chip and Dan Heath explain, "When a life transition lacks a moment, it can become formless" (p. 22). One participant who mentions her experience at the end of her expedition journey supports Chip and Dan Heath's research:

> There was this shell shock feeling after the experience that I couldn't express what was happening in words. It was emotionally exhausting. I don't know if that applied to everyone in my group, but I certainly felt it and having a space to share that was really important.

When the research participants and practitioners shared their experience of the liminal space, they often viewed it as a narrative arch. As humans, we become familiar with storylines that might shape how we view our experience. Joseph Campbell in his book, *The Hero With A Thousand Faces* (1949) explored this concept through his research of mythology using his universal motif called, The Hero's Journey (p. 211).

Figure 8:   The Hero's Journey
Source: Campbell, 1949
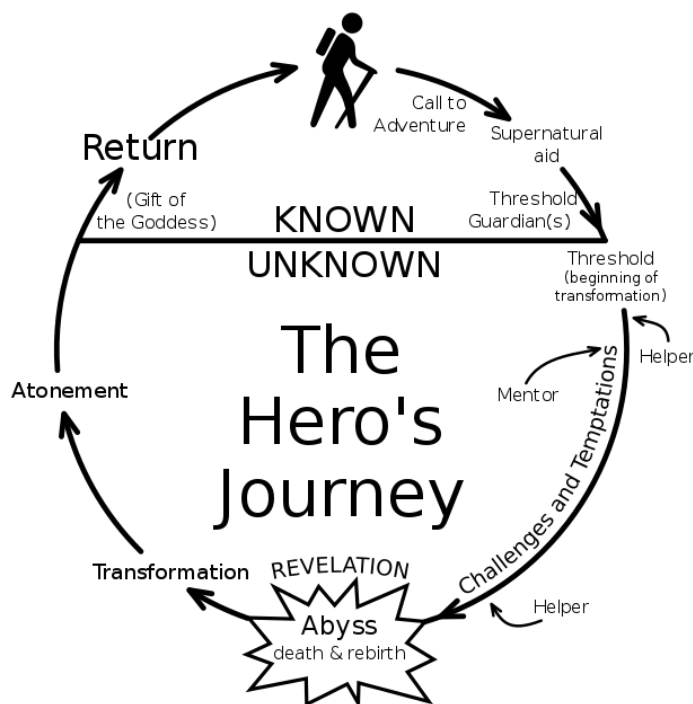
I listened to the research practitioners through Campbell's model as they described their

participant's journey through the expedition:

> My student, she experienced a lot of anxiety and was failing in school. She didn't know
> if she would be a good fit for the expedition, but wanted to try. The expedition was really
> hard for her - she cried every day. Mid way through the expedition, something clicked for
> her. She went from weepy and closed to sharing and opening up - breaking
> through. That was the moment. It was a powerful experience for her. She felt strong and
> connected.

In Campbell's model, the presence of a mentor usually takes the place of the instructor or guide

facilitating the expedition. The expedition participants find that they choose to bond with certain

instructors as they navigate the challenging experience.   When asking the research practitioners

how they support participants through the liminal space, several mention the art of helping:

> I spent a lot of time with one student. She was really having a hard time and I could see
> this through her cycle of negative thoughts, sitting or laying down on the trail, not

wanting to keep going. We were hiking up a hill when I dropped back from the group to connect with her. I didn't negate what she was going through. I just listened and said I understand this is hard. I knew she had to do this on her own, so I helped her find a walking stick, and helped her get her backpack on and she continued up the hill.

Another research practitioner disclosed the delicate relationship building and mentorship that takes place during the expedition between guide and student:

Sometimes, the student will choose an instructor to connect and bond with. In this case, it wasn't me. Students need someone to help them process what is going on during the expedition. Instructors who can build relationships with the students and push them - not willing to expect anything less than what they are capable of - are a great tool to students.

If we connect the models of Campbell, Maslow, Kolb and Van Gennep into the expedition experience, we can see that there are several dynamic frames at play. Below is my interpretation of how these models present structure in a complex system that depicts interpersonal dynamics, group dynamics and the internal experience.

Figure 9:   The Complex System on a Wilderness Expedition
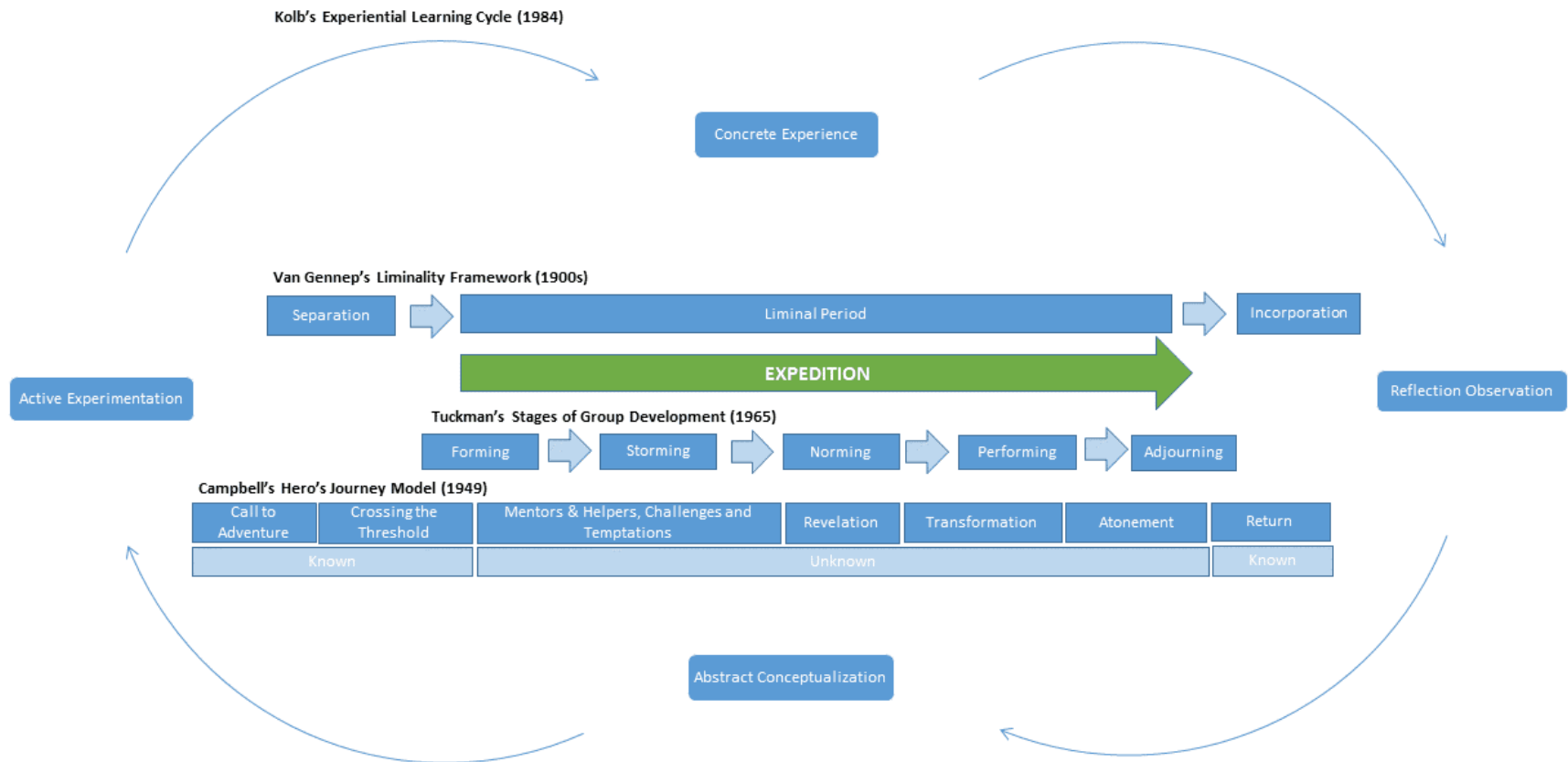
Building structure within an unstructured environment grounds an unsettling experience. Instructors recognize that the experience is unsettling and infuse structure to support student learning, provide context and enhance understanding. However, there is an art to knowing how, where, and when to provide structure, understanding that liminality is the catalyst that enhances the learning opportunities. Amongst practitioners, and perhaps subconsciously with the participants, is an understanding that to lessen the liminal experience (giving the unstructured too much structure) withholds its beautiful discoveries. Table 1 lists the effects of structure gathered from the research practitioners and participants and synthesized for learning opportunities.

Table 1:   Balancing Structure

Too Much Structure	Not Enough Structure
Sets the tone for expecting what cannot be expected	Overstimulation & sensory overload
Limits creative function and problem solving skills experiential learning provides	Inability for student to grasp important concepts
Creates rigidity and discourages flexibility in the face of change	Sends students into survival mode rather than a learning space

Below are several participant quotes that acknowledge the balance of structure during their wilderness expedition.

"I was impressed with how hands off they (the instructors) were. It kept us aware and agile." -Participant

"The instructors initiated a spirit of adventure during uncertainty." -Participant

"The safety I felt to share myself with others. They asked me what my goals were and they shared that they would help me tackle them. They only motivated us when we really needed it." -Participant

<u>The Unknown</u>

On the one hand, we exert our will in response to the uncertainty of liminal space; on the other; liminality seems to impress itself on us – if we are open to the experience. This second section examines what one research participant calls "the muck." This is where we look at the liminal space and honor its qualities for what it can offer the learner. In the earlier section, the data spoke to the human desire to create structure in an unstructured place. The data we will discuss here, speaks to the true nature of liminality and what can be experienced during this phase - if embraced.

The emotions reported from participants relate to the effects of liminality that are described in the literature review. These are anxiety, tension and confusion, while others reported the profound sense of expansion and adventure of the process. Two research participants explained the quality of liminality that exercised their mind, emotions and spirit:

> I was really surprised with how tired I was at the end of the day. Not just physical, but the emotional fatigue. I would lay in bed and reflect on my interactions throughout the day - where was the tension? Did I contribute to that tension? Did I need to adjust?

> When I found a spot in camp during down time, I just started crying. Not for any reason other than being overwhelmed with the process. They were happy tears.

Research practitioners speak to this process with a heightened sense of awareness and understanding of their participant's transformative experience. They understand that in order for the learning to really stick, they must be able to sit with their participant's or group's discomfort in the liminal space. One research practitioner describes this understanding and his trust of the process.

> Liminal space - they don't know. There's this expectation that they won't like what comes out in the end. They won't know if it was good for them or not… but it's positive because they learn about themselves. Even if they learn something about themselves that they don't like, there is some knowledge being gained. They are going through the process. Do they know it's good for them? Not always, it just works - it almost always works.

The process of the wilderness experience works because of its intensity. Although periods of down time during the expedition exist, the moments of necessary action can come at any time with little opportunity to plan and assess. One participant, upon reflection of her experience, speaks to this effect: "The expedition launches you into a place where you have to act. You can't overthink too much. You can't be in your head - you need to do." Participants describe the creative space that liminality encourages. Many times, liminality is asking us to try something new, even if we do not know how it will resolve: "You can't always see it, and you have to go blindly through it."

Transformation (Mezirow, 1990) and identity reconstruction (Watson, 2009) play a crucial role in the liminal space. On a wilderness expedition, participants find that they have the opportunity to suspend their preconceived beliefs about themselves, the world and one another. They begin to ask questions about their personal narrative - what is true about me? What does or does not support the story? Or, perhaps, what do I choose to disregard or recreate? Beech (2011) describes this concept with the support of Watson (2009):

> The social-identity is a 'site' in which people draw upon and are imposed upon by external discourses, and the self-identity is the internalized view of the self in which people seek to" 'keep a particular narrative [of the self] going' (Watson, 2009) (p. 64(2).

Beech's research reminds us that our narratives are not fixed – we can change them. A research participant describes her experience on the expedition that let her to question her belonging in the social setting. "I had some weird fear that I was too old for the experience. I was having this cognitive dissonance." Beech also describes identity as

> being constructed and reconstructed through dynamic interaction in which a person is 'cast' in an identity by others (Karrenman and Alvesson, 2001), seeks to project an identity to the outside world (Brown, 2001) and takes on (or enacts) behaviors, symbols and stories of an identity (Sims, 2003). These practices entail dialogue in which the inner self-identity is influenced by the outer social-identity" (Watson, 2009) (p. 64(2).

> Although the uncertainty of the expedition experience challenges participants to

question their identity, the nature of the shared group experience can perpetuate social norms. Particularly, when in an uncomfortable and unfamiliar setting like the wilderness, participants can default to familiar patterns and social stereotypes. One participant shares her experience:

> I fell into the quiet caregiver role. Maybe because that's a comfortable role I normally play. I felt comfortable in that space given the uncomfortable environment. I ended up cooking and checking in on others, instead of challenging myself in other areas unless it was essential.

Transformation and shifting a personal narrative is a powerful experience for participants that occurs during a wilderness expedition. When placed in an immersive group setting, participants are often encouraged by instructors to try on new behaviors to be more effective in certain settings. There are often times where participants remain in their similar patterns, in which case, tension can arise internally. In this tension is where the gift of the group comes into play. The group has the power to hold the mirror up and tell the participant if the way of being either does or does not fit the circumstances – then, up

to the participant to decide what to do with it. The group's feedback is powerful and

presents an incredible opportunity for transformation and greater self-awareness to arise.

To support this idea of transformation and self-awareness, below is a quote from a

research participant who tells a story about a 'disorienting dilemma' during his

expedition experience:

> *(Since coming to college as a freshman)*
> I didn't know anyone and I was lonely and didn't have friends and I started to lose confidence in myself. I didn't know how to share myself. And so I created this story that I wasn't confident. On the expedition, it was the first time I got feedback about myself. When people told me they didn't see me as confident, I thought, wow, they can see that? I thought it was just something I felt internally, and that I could hide it. The feedback I got didn't represent me being a freshman in an environment with upperclassmen, it was just that I didn't come across as confident in my communication. My team on the expedition brought that out of me and made me look at it - they put it in my face. I realized if they could see it and I could see it, then I must be able to change it.

Mezirow (1990) offers his research on transformation, which supports the student's

experiential learning journey through the acquisition of new perspectives and transitions.

Mezirow offers his definition of perspective transformation below:

> the process of becoming critically aware of how and why our presuppositions have come to constrain the way we perceive, understand, and feel about our world; of reformulating these assumptions to permit a more inclusive, discriminating, permeable and integrative perspective; and of making decisions or otherwise acting on these new understandings (p. 14).

Using Mezirow's Ten Phases of Perspective Transformation (1990), we can highlight this

participant's experience as he describes traversing liminality into a new way of being.

Figure 10:   Mezirow's Ten Phases of Perspective Transformation
Source: Mezirow, 1990
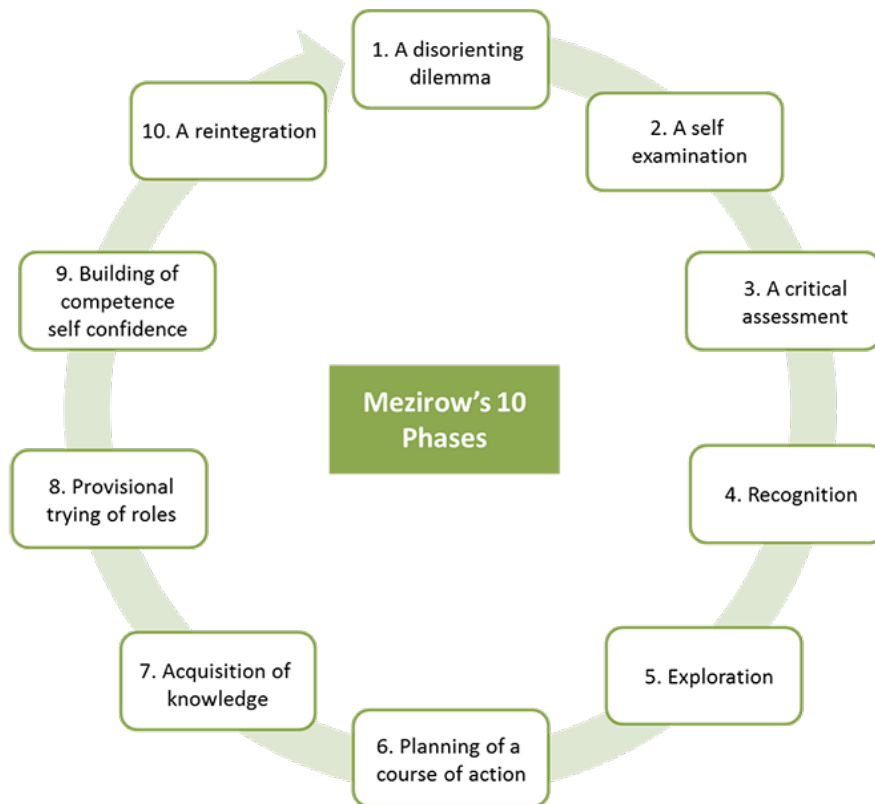
Stuckness

Can you get stuck in liminality? This question surfaced during the interview

process and stirred in my mind as the researcher. Even playing with the research

participant's word choice of "muck" to describe the liminal experience, gave me a

visceral image of an entity, unmovable in a viscous mire. According to research from

Lindberg and Rantatalo (2018), "stuckness" is a reality when learning to acquire new

perspectives:

> Liminality has also been defined in more abstract terms, such as conceptual 'in
> betweenness' in relation to learning (Hawkins and Edwards 2015). Meyer and
> Land (2005) used liminal space as a guiding metaphor to describe the state where

learners in educational contexts experience being in-between perspectives in the acquisition and appropriation of 'threshold concepts' that are pivotal and transformational 'conceptual gateways' that lead the learner to acquire outlooks. While being in a transitory state of learning, liminality is thus the in-betweenness wherein a new transformed status has not been achieved and the learner experiences epistemological 'stuckness' characterized either by conceptual difficulties or by alteration of different perspectives (Meyer and Land 2003, 2005). The empirical research that has made use of an epistemological take on liminality has, for instance, addressed students' experiences of doubt and uncertainty (Hawkins and Edwards 2015) as well as conceptual 'stuckness' (Wright and Gilmore 2012) (p. 353).

Practitioners in the field are aware of this possibility, recognizing that their effective contribution as a guide depends greatly on their participants' authenticity of where they are and their own awareness of themselves. One research practitioner share his thoughts:

Helping a student understand a new perspective or skill requires the self awareness of the teacher to understand what are the limits of their skills and what are the limits to the student's aptitude.

Learning new skills on a wilderness expedition is inevitable. Many are technical skills that enable one to be able to participate in and contribute to the experience with their fellow group members such as backcountry cooking, tying knots or learning to rock climb. However, when learning these new *hard skills* some of the *soft skills* begin to emerge as well. For example, setting up a tent in the dark is a *hard skill* that a student may learn and master. However, a more complex skillset is one that focuses on group dynamics that bridges the hard and soft skills. An example is seen during the expedition when a student quickly sets up their own tent with the *intention* of being available to then help another set up their tent before nightfall. Practitioners in the field sometimes call these dynamic skills, "expedition behavior" which requires students to adopt a mindset of being a contributing member to the team. The sticking point of these skills are gained

through empathy, experience and greater self-awareness. The objective for practitioners

in the field is to help their students grasp both the hard and soft skills, but they also

recognize that some students may not initially see the value of both during their

wilderness expedition.

Going into the unknown space requires courage and a tolerance to change. Whether

participants enter liminality with apprehension or with a spirit of learning, the process

will inevitably raise doubt that the exit exists. One research participant said, "I don't

know what this is going to look like in the end, but it's going to be something." The state

of how one enters liminality can sometimes be a precursor to feelings of "stuckness" or

feeling adrift in liminality. Research participants and practitioners consider "readiness"

to be essential in one's availability to the experience. One research practitioner addresses

that stuckness in his interview.

> For those that leave the liminal space and still feel adrift. I think it's because they
> were adrift before they entered the space. Their sense of self-identity was weak to
> begin with and they were a prisoner of their emotions - afraid of what they can't
> control so they try to control everything. If you are not grounded at the start - you
> may not be grounded at the end because it's hard to unpack.

Moving through liminality requires a pliable nature. From the learner's

perspective, being grounded yet flexible creates more opportunities for self awareness

and acquiring new perspectives. One practitioner states, "if your self-identity is too

strong, you can't shift - it's too much of a risk to lose what you have." Several

practitioners in the field suggest the best position is to "relax into it" and become flexible

in the discomfort. Much like being stuck in quicksand, the more you fight your way out,

the more stuck you become. Similarly, trying to control too much during liminality only

creates more feelings of being stuck. This is what it looks like to one research

practitioner:

> They (participants) try to control the way people (in the group) think about them by behaving a certain way, they try to control the pieces of the expedition, they try to control the group. They have too much to preserve to be able to go along with the experience. When you are trying to control all of this, you are taking too much on and aren't being authentic.

The truth is, on an expedition, liminality will reveal new possibilities even if the

participant is not prepared for it. One participant shares:

> once you've seen something (about yourself), you can't unsee it. Everything will change in different ways. You have to be primed and open for it. If you are not, it won't permeate. You have to be ready.

Cline (2020), supported by Bridges (2001) provide an interesting perspective that

reminds us that rigidity (staying in one place) can keep us from transitioning into

something new:

> The actual "transition" requires that we not linger in liminality by letting go of the way things used to be and embracing the new reality that is emerging (Bridges, 2001). To be intentional about ending one part of our life, to begin the next part of the journey. (p. 3)

<u>Reflection</u>

Reflection gives rise to a new idea or a modification of an existing abstract

concept (the person has learned from their experience) (McLeod, 2017), (Kolb,

1984). Without reflection, the learning possibilities cannot be examined and the value of

the liminal experience cannot crystalize. In the Kolb Experiential Learning Model

(Figure 1), a learner may enter the cycle at any stage (Kolb, 1974), but the learning

cannot occur unless all stages are accessed and integrated into the process (McLeod,

2017). This process includes reflection as a significant cog in the wheel to allow for meaningful understanding and conceptualizing to enact change. According to Lindberg and Rantatalo (2018), liminal processes involve stages of separation or detachment from earlier presuppositions followed by uncertainties as well as the potential to pass 'thresholds' and acquire new outlooks (p. 363). These concepts are important for review because reflection presents in the data as a key piece in the intentional design of the wilderness expedition. Practitioners in the field recognize that incorporating periods of reflection into the expedition enhance the student's learning experience. Reflection occurs most often, in the form of after action reviews (AARs) or debriefs at the end of the day or an event. Longer periods of reflection may also be incorporated to provide students personal reflection in the wilderness, like taking on the form of a "solo experience" (hiking with some distance from other group members, sitting silently in the wilderness for some time). Participants are sometimes asked to reflect on their future selves so they can focus their attention on improvement and setting goals. One research participant describes using her reflection time to write a six month letter to herself - a unique opportunity her instructors presented to her group. She articulates an interesting dilemma when her future self connects with their liminal self:

> I didn't open my 6 month letter right away when I got it. It wasn't fear, but I didn't want to go back to that time. A lot has changed. I asked myself some questions in my letter and talked about where I wanted to be in 6 months. But I didn't want to go back to that person because I didn't want to burst my bubble. I waited so long in the in-between place to make changes in my life and I knew what those changes were going to be when I wrote that letter. But I still didn't have 100% confidence. So I didn't open it right away, but when I did and read it - something shifted in my life.

Opportunities for reflection serve the purpose of both the individual and group's processing of the experience. The literature along the way reinforces the idea that liminality exists simultaneously in the worldview of the individual and the group. A research participant shares an example of the dynamics between her personal and group's experience during an after action review (debrief) at the end of the day:

> The debrief got really intense. We realized that we were triggering people during the day and didn't realize it. I was so focused on my own performance of the day and wasn't realizing what was going on for others.

Practitioners in the field capitalize on the opportunities for reflection. Intentional instruction is the backbone to driving the learning home for participants. The difference in students grasping concepts and making discoveries during the liminal space is the strategic placement of activities, inquiries and discussions. To this point, a research practitioner was asked the question, *where are the places that transformation occur during the expedition?* He said:

> I've seen a lot of moments where we are sitting quietly in a circle. Either after an activity or end of the day. And we are asking a question that might feel really simple (intentionally). Letting people fill in the meaning for themselves. Letting people have a space to talk. Quiet moments - thinking about an activity but not actually moving. People have time to process the hard stuff during that time. For the group's transformation, that is an important part. Having this space intentionally placed. To stop and reflect on it.

Participants do not always see the value of the tools instructors bring to the expedition, but they feel the power of their intentional delivery in the moment. One research participant recounts:

> A beautiful question gets a beautiful answer. I realized later the instructors were asking these questions with such intentionality. All the little things that can influence a group and my personal experience.

Closing

Navigating liminality is a complex and uncertain experience for both participants and practitioners during a wilderness expedition. For participants, experiencing liminality on an expedition is novel, even for those participants with experience working in teams or being in the outdoors. For practitioners in the field, having some control over the design of the expedition does not mean they are exempt from liminality. Practitioners face liminal moments alongside their participants and equally have to work to adapt to inevitable changes that occur during the experience. Both practitioners and participants learn that staying in a space of flexibility, openness and curiosity will award them a powerful learning journey. As I navigate through this capstone in my own liminality, and sit with my research participant's liminal experience, I am guided by many tools that have emerged as a result of this study. In the final chapter of this capstone I will present these tools for embracing liminality that reflect the data collected and as a testament to the expedition experience.

CHAPTER 6

SUMMARY AND CONCLUSIONS

Found

How will I know when I am there? Is a question that is asked before any claimed 'arrival.' The answer is twofold – when you have confirmed all of the knowledge you are aware of or, you say, for now, this is home.

This research exercise is not in any sense conclusive, rather it is one that has left me with so much more to question and investigate. For now, I stand here in the research and data I have collected and will use this opportunity to synthesize ten tools that have come up for me during this study. The container of a wilderness expedition has been an excellent landscape to explore and conceptualize liminality. Situated between the learner, practitioner and participant and research has, on a meta level, revealed these tools as somewhat "life lessons." Not surprising given the transferable and metaphorical nature of a wilderness expedition to real life. Continuing to play with the wilderness metaphor, I connect these tools to what wilderness instructors would call "handrails." While in the field, instructors use the term "handrail" when referring to navigational features that act as aids when traveling off trail. In the same way, for those who are "wandering through the wilderness," I conclude this chapter with ten navigational tools for liminality and a final reflection on the transition from this capstone.

Tools for Navigating Liminality

Navigational Tool #1 – Be Authentic

Liminality forces us to stop and take a look at ourselves. In a world where it can be easy to live life on autopilot, liminality disrupts the structures that can sometimes keep us operating out of habit. Claiming the space you are currently in validates your authenticity because knowing where you are will give you ground to know where you might be headed. If you can embrace where you are you will become more oriented in the liminal space.

Navigational Tool #2 – Build a Container

Liminality is disorienting. As humans, we crave context to formulate our understanding, especially in the unknown. A helpful tool is to get clarity on what is known and what is unknown. Perhaps you make a list of these items. Or perhaps you need a framework to discover more about yourself or your team. Find some way to get clarity – even if it is to get clear on what is not clear. Assess your thresholds, identify areas where you might need support – build it out.

Navigational Tool #3 – Stay Flexible

Liminality has a shifting effect. When living in uncertain times, the best way to operate is with flexibility. This is not to say to ignore your boundaries, but rather, take a closer look at them. Ask yourself why you have them. Do you need them? How might liminality be asking you to stretch yourself or try something new?

Navigational Tool #4 – Keep moving

There is a time and place to stop and orient, but staying still for too long can have its implications. At some point, action will be the only way to discover new information. Wandering with some intentionality gives legs to new opportunities, prototypes and ultimately, confidence.

Navigational Tool #5 – Challenge Yourself

Continuing to step outside of your "known" space will better prepare you for the bigger unknowns life may throw your way. Consider moments of liminality a gift. If you have been practicing in that space, you will build a stronger resilience.

Navigational Tool #6 – Grow Your Toolkit

Not all of your current tools may work for new situations. Keep some of your trusty, reliable tools, but consider upgrading your old ones or adopting new tools you have never explored before. Practice using them so you are better equipped to applying them to your current situation.

Navigational Tool #7 – Learn to Sit with Discomfort

Feelings of discomfort and tension are not always threats – they can be some of the greatest teachers. Learning to sit with these sensations will open new doors for you and give you more space to grow.

Navigational Tool #8 – Stay Connected

Liminality can feel isolating, but chances are you probably are not alone in the trenches. When you connect with others and share your experience, you have the opportunity to develop several of the other tools on this list. For example: when you connect with another person, you are given the opportunity to show your vulnerability and be authentic, you are given a mirror to see things you may not otherwise be able to see, you can learn new perspectives to keep moving and stay flexible, and you might find the encouragement to continue to challenge yourself.

Navigational Tool #9 – Practice Reflection

Liminality will encourages action and so taking time out for reflection become important to assess what is working and what is not. That said, there is a time for action and there is a time for reflection – try to avoid confusing the two. Reflection during action means you are not living in the present moment. Organize a separate time to reflect on your experience and become familiar with using different methods for reflection.

Navigational Tool #10 – Trust

After all of your tools are exhausted (including the ones not listed here), sometimes you just have to learn trust the process.

Transition (and final thoughts)

Towards the end of the expedition, students begin to face the reality that they will soon need to transition home. During this time, students and instructors reflect on the experiences that shaped their expedition. They begin to make meaning from their experience, they come to terms with what has changed about themselves, and they think about how their newly acquired skills will transfer back home. Ultimately, upon returning home, they acknowledge that there was value in each experience, but could not see it until the journey came to an end. Even years later, with greater awareness and distance from the liminal space, they realize the gift of learning is one that continues to unfold.

REFERENCES

Beech, N. (2011). *Liminality and the practices of identity reconstruction*. New York,

    N.Y.] : Sage Pub.

Bell, B. (2003). The rites of passage and outdoor education: Critical concerns for

    effective programming. *The Journal of Experiential Education, 26*(1), 41. Retrieved

    from https://proxy.library.upenn.edu/login?url=https://search-proquest-

    com.proxy.library.upenn.edu/docview/274917059?accountid=14707

Bell, B. J. (2012). *Assessing the effectiveness of an adventure-based first-year experience

    class*. Washington, DC : American College Personnel Association.

    doi:10.1353/csd.2012.0031

Buechner, B., Dirkx, J., Konvisser, Z. D., Myers, D., & Peleg-Baker, T. (2020). From

    liminality to communitas: The collective dimensions of transformative

    learning. *Journal of Transformative Education, 18*(2), 87-113.

    doi:10.1177/1541344619900881

Calleja, C. (2014). *Jack mezirow's conceptualisation of adult transformative learning: A

    review*. Edinburgh] : Community Learning Scotland]. doi:10.7227/JACE.20.1.8

Campbell, J. (2003). *The hero's journey: Joseph campbell on his life and work* New

    World Library.

Cline, P. (2020). *Learning to navigate uncertainty.* ().Mission Critical Team Institute.

Cochran-Smith, M., & Lytle, S. L. (2015). *Inquiry as stance: Practitioner research for the next generation* Teachers College Press.

David, J. (2008). What research says about collaborative inquiry. *Educational Leadership, 66*(4), 87-88.

Gennep, A. v., 1873-1957. (2013). *The rites of passage*. Chicago]: University of Chicago Press. doi:10.4324/9781315017594

Goodman, P., & Goodman, P. (1990). *Communitas: Means of livelihood and ways of life* Columbia University Press.

Harbecke, D. (2012). Following mezirow: A roadmap through transformative learning. Retrieved from https://rutraining.org/2012/10/08/following-mezirow-a-roadmap-through-transformative-learning/

Heath, C., & Heath, D. (2017). *The power of moments: Why certain experiences have extraordinary impact* Simon and Schuster.

Irving, G., Wright, A., & Hibbert, P. (2019). Threshold concept learning: Emotions and liminal space transitions. *Management Learning, 50*(3), 355-373. doi:10.1177/1350507619836062

Kitchenham, A. (2008). The evolution of john mezirow's transformative learning theory. *Journal of Transformative Education, 6*(2), 104-123. doi:10.1177/1541344608322678

Kusters, C., Batjes, K., Seerp, W., Brouwers, J., & Dickson Baguma, S.

    (2017). *Managing for sustainable development impact*

Levi, D. (2001). *Group dynamics for teams*. Thousand Oaks, CA, US: Sage Publications,

    Inc.

Liminality and transitional phenomena (1992). . London,: Published for the Society of

    Analytical Psychology Ltd by Academic Press etc.

Managing the monsters of doubt: Liminality, threshold concepts and leadership

    learning (2015). . London : Sage Publications.

Maslow, A. H. (1943). A theory of human motivation. *Psychological Review, 50*(4), 370.

McLeod, S. (2017). Kolb's learning styles and experiential learning cycle. Retrieved

    from https://www.simplypsychology.org/learning-kolb.html

Meyer, J. H. F., & Land, R. (2005). Threshold concepts and troublesome knowledge (2):

    Epistemological considerations and a conceptual framework for teaching and

    learning. *Higher Education, 49*(3), 373-388. Retrieved

    from http://www.jstor.org.proxy.library.upenn.edu/stable/25068074

Mezirow, J. (1991a). *Transformative dimensions of adult learning.* ERIC.

Morgan, G. (1997). *Images of organization*. Thousand Oaks, Calif.: Sage Publications.

NEUMANN, I. B. (2012). Introduction to the forum on liminality. *Review of International Studies, 38*(2), 473-479. doi:http://dx.doi.org.proxy.library.upenn.edu/10.1017/S0260210511000817

Payne, P. (2012). *Liminal mind, creative consciousness: From the artistsâ€™ vantage point*. Bristol, England : Intellect Ltd. doi:10.1386/tear.9.2-3.189_1

Prashantham, S., & Floyd, S. W. (2019). *Navigating liminality in new venture internationalization* doi:https://doi-org.proxy.library.upenn.edu/10.1016/j.jbusvent.2019.01.001

Rantatalo, O., & Lindberg, O. (2018). *Liminal practice and reflection in professional education: Police education and medical education*. Adelaide] : University of Adelaide, Dept of Continuing Education. doi:10.1080/0158037X.2018.1447918

Skjoldager-Nielsen, K., & Edelman, J. (2014). Liminality. *Ecumenica, 7*(1-2), 33-40.

Tuckman, B. W. (1965). Developmental sequence in small groups. *Psychological Bulletin, 63*(6), 384.

Turner, V. (1969). Liminality and communitas. *The Ritual Process: Structure and Anti-Structure, 94*, 130.

Turner, V., Abrahams, R. D., & Harris, A. (2017a). *The ritual process: Structure and anti-structure* Routledge.

Turner, E. L. B., 1921-. (2012). *Communitas : The anthropology of collective joy /*. New York : Palgrave Macmillan. doi:10.1057/9781137016423

Watson, T. (2009). Narrative, life story and manager identity: A case study in autobiographical identity work.

Winnicott, D., W. (1960). The theory of the parent-infant relationship. *International Journal of Psycho-Analysis, 41*, 585-595.

APPENDICES

Appendix I - Email Introduction to Participants, Participant Consent Form & Instructions (Pre-COVID-19 Strategy)

_____

Dear Intern Travel Group,

My name is Erica Montemayor and in 2009 I began my Outward Bound career as an intern launching into the field on my first training. To say the least, I am very excited for your upcoming journey!

Over the course of eight years, I occupied many roles at the Philadelphia Outward Bound School which were highly rewarding and laid the groundwork for my current position of three years at the Wharton School at the University of Pennsylvania. In this position, I continue to facilitate experiential expeditions and leadership programs and am constantly reminded of the importance of this work. Parallel to occupying a new position at Penn, I also decided to pursue my master's degree in Organizational Dynamics as a way to synthesize what I've learned in the field of experiential education and working with teams. I am now in my final semester and writing my thesis.

This brings me to a request I have of you as you embark on your upcoming field experience.

In order to complete my thesis I hope to collect some data that might inform my research surrounding the experiences we provide students in the field. Without divulging too much about the study to you as potential research participants, I have attached a consent form where you can read about the research requirements and make an informed decision about electing into the study during your field training. My hope is that the qualitative data you would be providing me will only help enhance your sense-making of your upcoming experience. I am conscious to avoid a design in the study that will distract you and your trainers from this important training.

If you decide to be a part of this study, please provide your consent form to me via email by Monday evening 3/16.

If you have any further questions, please feel free to reach out to me. I have consulted with your trainers who are in support of your desired or declined participation in the study.

Thank you for choosing this valuable career path and for your service, dedication and hard work to come in the future.

With gratitude,

Erica

_____

Organizational Dynamics Program
University of Pennsylvania

College of Liberal and Professional
Studies Office
3440 Market Street, Suite 100
Philadelphia, PA 19104

Erica Montemayor (Graduate Student)
215.880.1350 phone
emont@wharton.upenn.edu

Outward Bound Apprentice Research Team

Apprentice Research Team:

Do you desire to gain a deeper understanding of the process by which a wilderness expedition such as an Outward
Bound course can provide? Participating in this study may result in valuable insights into the individual and
team experience. In collaboration with the Philadelphia Outward Bound School, I hope you will help me conduct
research that may help inform my thesis for a master's degree in Organizational Dynamics at the University of
Pennsylvania.

Below are the requirements:

Duration:
The time period and duration of the research engagement are:

    (a) ~ 10 min written questionnaire prior to Apprentice Field Training (administered via email on 3.17)
    (b) ~ 10 min written reflection (questionnaire) conducted nightly during field training
    (c) ~ 10 min written reflection (questionnaire) post Training

Location:
Questionnaires will be conducted in various field locations during Apprentice Field Training from March 18-24, 2020.

In return for your valuable contribution, I will provide an optional professional development seminar at the Philadelphia
Outward Bound School on my research topic. You may find the topic to be valuable as your develop your skills
as an experiential educator and facilitator of teams.

**CONFIDENTIALITY: Please note that participation in this study will include protection of your identity and the
information collected (questionnaires).**

Do you consent to being a part of this study? (Yes/ No) _____

Name: _____ Signature: _____

Phone #:_____ Email: _____

_____

Instructions:

Use the following pages to complete the nightly reflections. There is no need to take notes throughout the day to capture your experience. Simply take a moment each night to describe what you remember most. Stick to the prompted questions for each day. Do not edit your responses after you complete them for the day. Do not ask others for their recalled experience as you write these reflections. Please provide only what you have personally experienced and remembered.

Thanks for participating in this research project and responding to these questions. I may want to follow up with you after the training/experience to better understand your responses and make sure that I have understood accurately what you have said/written.

☐ Please check the box if you are willing to talk with me after the training.

Appendix II - Questionnaires for Participants/Trainees (Pre-COVID-19 Strategy)

Pre-Field Experience Questionnaire
Q1: What are your intentions for this experience?
Q2: What do you anticipate happening as a result of this experience?
Q3: Are any particular emotions present for you prior to this experience?

In-Field Questionnaire (Daily)
Q1: How would you describe your personal experience today?
Q2: How would you describe the group's experience today?
Q3: What moments stand out for you today?
Q4: Are any particular emotions present for you after today's experience?

Post-Field Experience Questionnaire

Q1: How did you see yourself at the beginning of this experience?
Q2: How do you see yourself now?
Q3: How did you see the group at the beginning of this experience?
Q4: How do you see the group now?
Q5: What moments are most memorable? Why?
Q6: Are any particular emotions present for you since you have completed this experience?

Appendix III - Questionnaires for Practitioners/Trainers (Pre-COVID-19 Strategy)

Pre-Field Experience Questionnaire
Q1: What are your intentions as a facilitator of this experience?
Q2: What do you anticipate happening as a result of this experience?
Q3: Are any particular emotions present for you prior to this experience?

In-Field Questionnaire (Daily)
Q1: How would you describe your experience as a facilitator today?
Q2: How would you describe the group's experience today?
Q3: What moments stand out for you today?
Q4: Are any particular emotions present for you after today's experience?

Post-Field Experience Questionnaire
Q1: How did you see the group at the beginning of this experience?
Q2: How do you see the group now?
Q3: Did the group change? If so, when did you notice the change(s)?
Q4: What moments are most memorable? Why?
Q5: Are any particular emotions present now that the experience is over?

Appendix IV - Semi Structured Interview Template for Participants (COVID-19 Response Strategy - Actual Study)

Q1: What were your intentions for the experience?
Q2: What did you anticipate as a result of the experience?
Q3: What actually happened for you? The group?
Q4: What transformed?
Q5: Describe your experience using a metaphor

Appendix V – Semi Structured Interview Template for Practitioners (COVID-19 Response Strategy - Actual Study)

Q1: What experiences can you describe for a participant on an expedition? What happens?

Q2: Have you noticed transformation occur during the expedition? If so, where does it occur?

Q3: What emotions are you aware of that groups or students encounter during the expedition?

Q4: What tools do you employ as a facilitator of these experiences? How do you support students?

Q5: What is the most valuable thing students learn by taking part in this experience?