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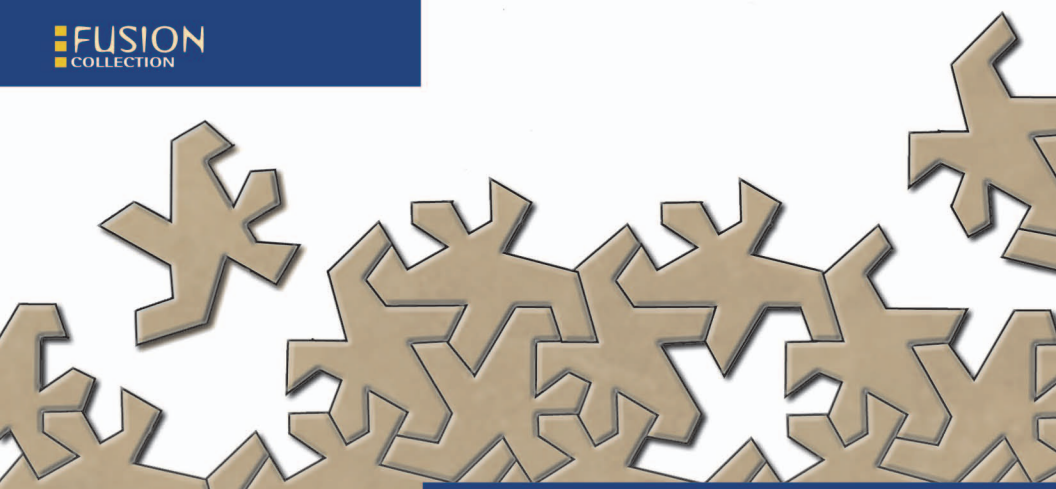

# PROFESSIONAL COMPETENCIES FOR ACCOMPANYING CHANGE

## A FRAME OF REFERENCE

Louise Lafortune

With Chantale Lepage, Franca Persechino and Avril Aitken

Preface by Sylvie Turcotte

Afterword by Margaret Rioux-Dolan

Presses de l'Université du Québec

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# PROFESSIONAL COMPETENCIES FOR ACCOMPANYING CHANGE

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# PREFACE

In the past decade, education systems have undergone significant change across Europe, Africa, and the Americas. This has been the case in Québec, too. Societal expectations, as expressed during Québec's estates general on education in the mid-1990s, and the latest research in the field, led the education community to reexamine its conceptions about teaching, learning, and evaluation. Changes were seen as necessary given that schools were expected to prepare students for life in a constantly changing world fraught with increasingly difficult challenges.

For organizations, change on this scale represents a number of stimulating challenges. Transforming conceptions and practices takes time, and the people involved need guidance to navigate the complex process, because change—even prescribed and directed change—cannot be imposed. This is why it is so important to help organization personnel take ownership of change and better understand its positive impact.

In light of this, Québec's Ministère de l'Éducation, du Loisir et du Sport decided to support a six-year research-accompaniment-training project (2002–2008) to implement the Québec Education Program. This project resulted in *Professional Competencies for Accompanying Change*, the frame of reference presented in this book. This frame of reference is largely based on the results of the research conducted under this project, but is also inspired by research conducted around the world.

Although the "accompaniment" competencies described here are associated with implementing prescribed change in education, they can easily be translated to other organizational contexts where major changes are needed.

In addition to describing and reporting the results and impact of the research-accompaniment-training project, this frame of reference can serve as a tool for reflection and intervention in initial staff training and professional development, notably for exploring in more depth concepts related to the development of a knowledge culture crucial to "accompanying" the employees of an organization. This requires that those providing accompaniment develop professional practices consistent with the foundations of the change at hand.

During the course of the research-accompaniment-training project, the project team was called upon to play an accompanying role, even as team members themselves were learning the socioconstructivist accompaniment approach. As a result, the need to clarify the nature of "professional competencies for accompaniment" quickly became clear. This frame of reference is based on the work of these educators and academics who visited a cross-section of institutions throughout the Québec educational network, observing initiatives to accompany change. Without their commitment, this project would never have achieved so much or shown such creativity.

I would also like to underscore the remarkable contribution of Professor Louise Lafortune of Université du Québec à Trois-Rivières, who coordinated the project over its six-year span. The project owes much of its success to her discipline, determination, and leadership, and to the attention she paid not only to her team, but also to the people from all across Québec whom she helped, encouraged, and empowered to play a significant role in their workplace communities. We are proud to share some of the fruits of her team's labors in this book.

Happy reading.

**Sylvie Turcotte**[1]
Director, Direction de la formation et de la titularisation du personnel scolaire
Ministère de l'Éducation, du Loisir et du Sport

1. Sylvie Turcotte was director of Direction de la formation et de la titularisation du personnel scolaire throughout the duration of the project.

# ACKNOWLEDGMENTS

The Research-Accompaniment-Training Project for Implementing the Québec Education Program was a major six-year project (2002–2008) involving sweeping educational reforms. The project required major funding as well as collaboration from numerous individuals. I would particularly like to thank the Ministère de l'Éducation, du Loisir et du Sport for providing financial support, but also for authorizing various members of the education community to act as accompaniment providers at the provincial level for groups scattered all across Québec. I would also like to thank Robert Bisaillon, the assistant deputy minister at the launch of the project, and his successor Pierre Bergevin for authorizing the project to go ahead. I thank Avril Aitken for a professional collaboration with the translation.

I am indebted to ministry representatives Sylvie Turcotte and Margaret Rioux-Dolan for their unwavering support and encouragement. A special thanks goes to the team at Direction de la formation et de la titularisation du personnel scolaire and its director, Sylvie Turcotte, for the vital resources they made available to the project team, their regular attendance at meetings, and their always-pertinent comments and suggestions. Thanks, also, to Université du Québec à Trois-Rivières for encouraging this partnership and providing access to the material resources and people needed to make it a success and facilitate its operation.

Many people had a hand in producing this frame of reference on professional competencies for accompanying change. Through their contributions, they helped us identify, clarify, and validate these competencies. I would especially like to thank Chantale Lepage and Franca Persechino, who worked closely with me to develop the structure of the frame of reference using data from research, accompaniment team discussions, and project team discussions in order to take into account participants' comments and reflections.

I am grateful to the members of my accompaniment team, who completed the project and provided constructive and critical comments on the final versions of the frame of reference. Their contribution has been vital. They are Avril Aitken, Nicole Boisvert, Grant Hawley, Carrole Lebel, France Plouffe, and Gilbert Smith. I also wish to thank the other accompaniment providers, Simone Bettinger, Bernard Cotnoir, Ginette Dubé, Jean-Marc Jean, Reinelde Landry, and Doris Simard, who also helped fuel our reflections at various moments.

Thanks must also go to the research professionals and assistants who were ongoing contributors to the project—Kathleen Bélanger, Karine Boisvert-Grenier, Bérénice Fiset, Sylvie Fréchette, Carine Lachapelle, and Nathalie Lafranchise—as well as to those who contributed on a more sporadic basis, including Karine Benoît, Lysane Blanchette-Lamothe, Marie-Pier Boucher, Marie-Ève Cotton, Moussadak Ettayebi, Élise Girard, Lysanne Grimard-Léveillé, Marie-Claude Héroux, David Lafortune, Bernard Massé, Vicki Massicotte, Geneviève Milot, Jean Paul Ndoreraho, Andrée Robertson, and Caroline Turgeon.

Lastly, throughout this endeavor, I have had the immense pleasure of working with educational professionals such as school principals, consultants, teachers and other members of the education community who joined in the coconstruction process to help create this frame of reference. By sharing their expertise and knowledge, they fueled my reflections, helped me clarify my thoughts, and propelled the provincial accompaniment team forward. Without their involvement and commitment, this project would never have seen the light of day. For this, I offer them my heartfelt thanks.

**Louise Lafortune**

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# INTRODUCTION

## Accompaniment Leadership for Implementing Prescribed Change

In a constantly evolving world, organizations in education, healthcare, community service, and the work world in general must adapt. They need to anticipate ongoing change so they can help their staff members learn to accept and gradually integrate prescribed changes into their practices. Anticipating change makes it possible to avoid serious resistance that can hinder or even prevent change as well as overenthusiasm that, in some, may provoke insecurity or refusal to accept change. Generally speaking, the changes that organizations introduce are directed and prescribed, even if the prescriptions are flexible, allowing accountability, autonomy, cooperation, and discussion.

In this respect, bringing about change is a veritable achievement for organizations and their members. One way in which to implement major change is to provide accompaniment[1] for the persons who implement it in the course of their day-to-day work. This involves the use of

1. "Accompaniment" is a new word that expands the concept of "training" or "coaching" to encompass support that individuals receive in learning situations so that they may progress in the construction of their knowledge (Lafortune and Deaudelin, 2001, p. 199). In a socioconstructivist theoretical context, it includes the notion of interaction with one's peers and has as its aim to activate prior experiences, give rise to sociocognitive conflict, make the most of any such conflict that arises in discussions, coconstruct in action, track down erroneous conceptions, and profit from self-awareness arising from certain constructions. It entails frequent meetings where the changes in the professional lives of participants are discussed and studied.

resources—human as well as material and financial—to foster change. It implies collectively constructing a change implementation process to ensure necessary training, and also taking into consideration the affective responses that might be elicited by the demands that change imposes. Accompaniment requires people to conduct training, individuals who themselves have embraced change and are committed believers. These change agents basically motivate others to accept recommended changes. Encouraged to develop new practices, some individuals may attempt to preserve equilibrium; they may even accept living with a certain degree of cognitive dissonance if the experience is structured in a way that maintains their affective stability. Effecting change can involve a great deal of insecurity and engender many forms of resistance. Change often upsets the status quo and therefore may be seen as destabilizing by some people, while others view it as a stimulating challenge, an opportunity to redefine the way things are done, to propel the organization—and their own work—forward.

Major changes within the Québec education system provided the backdrop for an accompaniment-research-training project carried out in Quebec. During the course of the project, the need arose to develop a frame of reference covering the professional competencies used in accompaniment. While the competencies presented and described in this book hail from the field of education, they can be applied in other fields, especially those involving directed change. We are talking about a frame of reference for the competencies to be developed and used by prospective accompaniment providers who believe that those being accompanied are the ones responsible for structuring their own thinking and taking ownership of the principles of change, and that only they can modify their practices in light of the prescribed change. This perspective comes out of socioconstructivist theory (explained in the following chapter), which underlies the frame of reference discussed in this book.

## THE AUDIENCE FOR THE FRAME OF REFERENCE

The frame of reference on professional competencies for accompaniment is intended for those who facilitate change. It is the culmination of a collective construction that involved reflection, discussion, and questioning within or among accompanied groups. It is based on the work of a team that covered a wide cross-section of the Quebec educational system, and that observed, in action, initiatives to accompany change. This frame of reference can be applied to various situations using

accompaniment providers identified to perform this task. Under pressure, it is difficult to carry out such efforts and to command the commitment to change. Accompaniment providers must have a thorough appreciation of the rationale behind the changes that are to be made, even if they are learning as they go along how to help others implement these changes.

## EIGHT PROFESSIONAL COMPETENCIES FOR ACCOMPANIMENT

This book presents eight professional competencies for accompaniment. They are used in situations, in interactions with others, and as a function of workplace culture and customs. In interventions, they are used in an integrated and complementary manner, taking into account the accompaniment provider's model of professional practice and considering the adaptations that these individuals have made to their own models depending on how they interpret the foundations of the change. The eight professional accompaniment competencies in this book are as follows.

- **Competency 1** Take a stance conducive to the process of accompanying change
- **Competency 2** Model reflective practice when accompanying change
- **Competency 3** Take the affective domain into consideration when accompanying change
- **Competency 4** Maintain reflective-interactive communication in preparing for and facilitating the change process
- **Competency 5** Utilize professional collaboration to move the change process ahead
- **Competency 6** Make use of action plans to accompany the change process
- **Competency 7** Use evaluation in the change process
- **Competency 8** Use professional judgment, acting ethically and critically

When dealing with a change that includes prescriptive elements, it becomes necessary to define the professional competencies needed to provide accompaniment. The next chapters comprise the structure for the

frame of reference on the professional competencies for accompaniment. Professional acts associated with these competencies are listed and explained with the help of actions and methods. The frame of reference constitutes an integrated, coherent system. It describes the competencies and professional acts used to accompany and implement change, through the use of a system that influences, directs, guides, and confronts all the judgments, decisions, and actions of accompaniment providers in such a way as to encourage commitment among those accompanied (see Blay, Castel, Engel, and Lenclud, 2006).

Development of this set of competencies assumes that accompaniment providers use the professional acts and actions associated with the various competencies to adopt an implementation stance. In addition to being integrated with the accompaniment process, the competencies constitute a system where reflection and interaction influence the context of the intervention and put the emphasis on realizing change.

## USEFULNESS OF THE FRAME OF REFERENCE

The professional competencies for accompaniment will serve as a reference. This frame of reference clarifies how to adopt an accompaniment stance and the reflective practice that results from it. It encourages accompaniment providers to develop and hone their professional competencies. However, nurturing such development requires using the frame of reference in a special way that involves self-evaluation, self-observation, self-reflection, and self-teaching. It also goes without saying that on the practical level, we can make use of theory to nurture reflection and continued professional development.

This frame of reference was developed with the goal of deepening reflection on change that focuses on professional practice. It offers support for teams of colleagues or peers engaged in accompaniment. During discussions with various partners, it can serve as the basis for dialog about the accompaniment needed to update practices, as well as the commitment to initiate action.

The frame of reference can be used to instill awareness of socioconstructivist accompaniment in targeted environments and to help people understand the benefits of the process for embracing change and updating practices. By disseminating the frame of reference, the process can be better understood. Measuring the effects associated with development of the professional competencies will give administrators

the opportunity to assess the importance of these effects in the process of providing accompaniment for personnel. This frame of reference makes it possible to ground guidelines for action within the perspective of prescribed change. It provides the reference points needed to analyze workplace practices and serves as an aid for the regulation of actions with regard to development of accompaniment competencies.

Taking the knowledge in the frame of reference into consideration helps accompaniment providers better understand the importance of their roles. They can draw on it to model their interventions and make adjustments using a socioconstructivist perspective as they improve their competencies. By consulting the frame of reference, they deepen their theoretical and practical understanding so as to use it more effectively in the accompaniment process.

This frame of reference can also serve as a tool for reflection and intervention in initial and ongoing training to explore certain concepts more deeply, especially those related to the development of a culture associated with staff accompaniment at institutions, organizations, and companies, and the development of professional competencies. This requires professional practices that are consistent with the foundations of the change to be implemented.

## HOW TO USE THE FRAME OF REFERENCE

The frame of reference on professional competencies for accompaniment is for anyone involved in training, consulting, teaching, and accompaniment; it is for all those serving as professional accompaniment providers within their organizations or institutions who wish to improve their intervention skills, further develop their competencies, challenge their models of practice, or improve their professional efforts.

As a tool for reflection but also for intervention, this frame of reference provides a map for developing professional competencies used to accompany change. It responds to a need for accompaniment on the part of personnel who, while confronting change themselves, must accompany others to help them embrace change. This is not easily done; it is why accompaniment is carried out over numerous meetings and with persons who are able to support others in the process. Depending on the nature and significance of the proposed change, rethinking models of professional practice requires time and skilled persons to guide the process in the spirit of the change that is to be made.

Here are examples showing how the frame of reference for accompaniment can be used. The explanations provided throughout the book expand upon the underpinnings of these methods to help the reader employ them in a coherent, integrated manner.

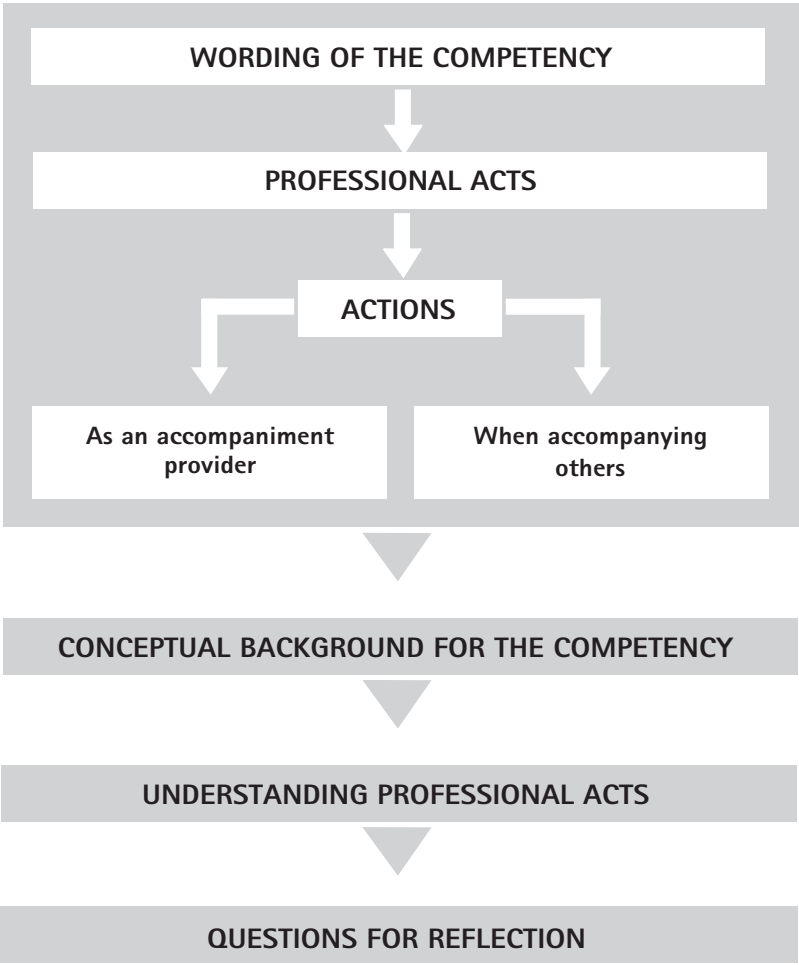
- The frame of reference is structured to help users self-evaluate their professional competencies for accompanying change. A self-evaluation grid or bullet-point list could be suggested at the outset, midpoint, and end of the process. The evaluation could potentially be inspired by the professional acts proposed for each competency so as to encourage action. For example, the grid could contain statements about the professional competencies as well as the list of professional acts associated with them. The idea is to permit accompanied individuals to self-evaluate their level of competency development and set goals for the level of competency they ultimately wish to achieve.
- The frame of reference can be helpful from a competency improvement perspective in evaluating accompanied individuals who are developing their accompaniment competencies. As such, adaptations of the previous grid might be suggested. For example, the grid could point out what each accompaniment recipient might provide in order to meet certain challenges.
- The frame of reference can be used to show how to elicit the questioning of practices and beliefs connected to foundations of the change, and to illuminate the advantages of change or reflect upon a change in practices.
- The frame of reference can help in compiling a professional portfolio that includes questions about one's practices and reflections on personal strengths and areas for improvement.
- The frame of reference can provide tools for leading group discussions about the resources (external and internal) required to develop competencies, for example, identifying the competencies needed to embrace change.
- The frame of reference can provide a way to look at clarifications to be made to each competency on the basis of various contexts, and also at roles to play or tasks to carry out within an organization (for example, a position as a teacher, educational consultant, school administrator, school board manager, etc.).
- The frame of reference provides a series of questions to provoke the dialog and comparison of different perspectives needed to trigger the questioning of one's beliefs and practices.

- At the conclusion of the accompaniment process, the frame of reference can be used as a basis for self-evaluating competencies, clarifying what helped develop competencies, and identifying future goals and how they will be met.
- The frame of reference can help an organization model its own concept of change and accompaniment, thus helping create its own model of practice (see Lafortune, 2008b).

## STRUCTURE AND ORGANIZATION OF THE FRAME OF REFERENCE

The first chapter presents conceptual aspects associated with the frame of reference covered in the book. Each ensuing chapter is devoted to one of the eight professional competencies. First, all competencies are presented using diagrams showing the professional acts and primary actions associated with each of them. The competency is shown in context with the help of conceptual elements, and some definitions are provided to show where it fits within the perspective of socioconstructivist accompaniment. This section is followed by the professional acts to be performed. After each competency is presented, specific aspects of it are summarized in relation to the others. Lastly, there are two series of questions intended to prompt reflection: the first series, suggested for the start of the accompaniment process, aims to activate existing knowledge and previous experiences. During the course of action, these questions invite people to find time to reflect, carry out a synthesis, clarify, and so on. Another series of questions serves to foster a deeper understanding of the professional acts to be implemented. The illustration that follows shows the organizational structure of the frame of reference.

Figure 1
**Organizational Structure of the Frame of Reference, by Competency**



# Conceptual Basis of the Frame of Reference on Professional Competencies for Accompaniment

The frame of reference presented in this book emerged from a project to accompany change in professional practices in the field of education. Such change, even though prescribed to a certain extent, must be somewhat flexible in order to support the change process among staff undergoing the change. In this sense, this frame of reference is rooted in professional practice even though the purpose of the project was to develop a conceptual basis, which was enriched during the course of the project. Although it is the fruit of an undertaking in education, the frame of reference presented here can apply to other fields and change situations. A brief explanation of the context in which it was developed will help readers understand its rationale. This is followed by an explanation of socioconstructivist accompaniment to prescribed change, as well as a number of approaches to the change process and some principles to emphasize. Conceptual clarifications are provided in the guidelines and principles.

## HOW THE FRAME OF REFERENCE EVOLVED

The eight professional competencies covered in this book emerged from an accompaniment-research-training project (PARF) carried out as part of the implementation of the Québec Education Program (QEP)

(2002–2008). The research project collected data from groups of people throughout the province who had been accompanied in the Québec school system (Lafortune, 2008b). The data was collected in a number of different ways, including reflection sheets filled out by the people who had been accompanied, reports by accompaniment providers, recorded meetings, summaries of focus group meetings, and so on. The results were synthesized a number of times throughout the project and submitted to the accompanied individuals for their review. The modified summaries were then resubmitted for discussion in a process of ongoing theory-building (Lafortune, 2004c). This frame of reference also draws from the frame of reference on teaching competencies (MEQ, 2001) and from experiences and research in accompaniment (Boucher and Jenkins, 2004; Charlier, Dejean, and Donnay, 2004; Dionne, 2004; Gather Thurler, 2004; Lafortune and Deaudelin, 2001; L'Hostie and Boucher, 2004; Paul, 2004; Pelletier, 2004; Savoie-Zajc, 2004). The professional competencies for accompanying change presented in this book are those involving implementation of a change—they are part of the results and spinoffs of this project.

At project start, the need to define "professional competencies for accompaniment" quickly became obvious. To accompany prescribed, guided change, accompaniment providers must develop a shared definition of the desired change. Redefining roles and adapting individual practice models can be unsettling, and participants must accept some degree of risk throughout the process in order to remain open to change and to lend the process credibility—when confronting change, the accompaniment providers, like those they are supporting, find themselves in a learning situation.

Even if the professional competencies described here were developed in the field of education, they were intended to be applied to other situations of change, especially guided change. This is a frame of reference to be developed and used by people who want to accompany change in a socioconstructivist perspective.

## A SOCIOCONSTRUCTIVIST PERSPECTIVE OF ACCOMPANIMENT

To bring about change, it is necessary to establish a theoretical perspective that provides consistency. It is also necessary to develop a shared vision of change, question certain professional practices, and understand accompaniment in the light of the adopted theoretical construct.

The frame of reference on professional competencies for accompaniment presented here fits into a socioconstructivist perspective. A socioconstructivist approach to helping people adopt change involves the development of professional accompaniment competencies by which accompaniment providers understand, embrace, and deepen their understanding of change in order to support other people through the process. The accompaniment providers act as models. They perform professional acts that foster and bring about change. They model these acts for others but also help the people they are accompanying to perform them as well. This is especially challenging because the accompaniment providers must help others through the process while they are experiencing it themselves. In fact, through modeling (being an example rather than giving examples), they develop their own professional competencies as well as those of the people they are assisting. This is a way to demonstrate the importance of coherence between thought and action, between theory and practice. Coherence is essential to training and lends credibility to accompaniment providers in that they themselves assimilate the changes into their own practice model, and this helps the people they are supporting to accept change.

Major change calls professional practices into question. However, if the changes are part of a process of competency development within a socioconstructivist perspective, accompaniment becomes a means of supporting knowledge building and competency development in the people being assisted, a process they carry out in collaboration with their peers.

The socioconstructivist construct prescribes deliberate interventions to provoke sociocognitive conflict, identify it as it arises, and help the people being assisted to step back from their learning experience. This sociocognitive conflict causes a state of cognitive dissonance flowing from social interaction (Lafortune and Deaudelin, 2001). A socioconstructivist perspective on accompaniment also entails a process of coconstruction that allows each person to contribute to developing the collective model according to his or her own model. Each individual then takes ownership of the collective model and adapts it to his or her way of doing things (adapted from Lafortune and Deaudelin, 2001). The contributions of the people in the group and the various roles they play enhance the accompaniment process and help develop a shared vision of change—this is why it is so important to forge a true partnership.

Accompanying change, especially prescribed change, calls for a form of partnership. The vision for change must not be imposed; rather it is a matter of providing leadership and influencing the staff being accompanied to support them in the coconstruction of a shared vision of change and its implementation in the work environment. Like the change itself, constructing a collective vision for change requires openness and tolerance for uncertainty and ambiguity in the vision (see Vallerand, 2006a, b), which can often cause a degree of instability and hesitation, a search for meaning, and a period of trial and error and experimentation. This shifting state, otherwise known as "letting the pieces of the puzzle fall into place," requires that members of the group accept a period of searching and uncertainty, which in turn promotes collective reflection and the search for solutions as a group and changes minds. The group alternates frequently between theory and practice and acknowledges individual and collective expertise acquired in the field, because practice also contributes to building the theoretical underpinnings of a change in process.

The transition towards change can be a time of much soul-searching; people may even start doubting their own abilities and competencies, while others will question their beliefs and practices. Change is unsettling and makes people feel insecure or even lose confidence entirely and feel incompetent. In the face of the intrusive or compulsory quality of change, the staff being assisted seek to understand it and adapt the new frame of reference to their own professional practices and integrate it into their own models. They need to be accompanied through this transition period because when people are insecure and threatened, they need reassurance, support, guidance, and coaching. When forging a vision for change, staff must maintain a certain level of confidence and commitment in order to help others be confident and embrace change.

Socioconstructivist accompaniment requires participants to adopt a reflective stance that encourages both interaction and action. For the purposes of the accompaniment process, professional acts refer to actions, objects, values, and attitudes necessary to accompany change. To act competently, the person must know the partners involved in the change and solicit expertise from the field so it can serve the practice community involved in the change. By engaging in this process, the accompaniment providers evolve and develop professionally and continue to structure and strengthen their professional identity.

Evaluation practices also help the change move forward and support the updating of practices and the development of professional competencies. Knowledge of the thrust and principles of the change at hand is

necessary in this regard. Accompaniment thus depends on an understanding of the fundamental nature of the change and an in-depth knowledge of the means and strategies to implement it.

**Prescribed change aimed at updating professional practices**

Prescribed change aimed at updating professional practices is a goal-oriented proposal to modify the way in which certain professional practices are performed. Such change must be solidly grounded to ensure consistency and help foster respect for the proposed changes among those affected. The idea of prescribed change implies a certain obligation. At the same time, flexibility is required when working with people considered as professionals, even though a certain amount of rigor is necessary. This is the opposite of rigidity, which is why it is vital to accompany prescribed change.

A change that includes prescribed aspects will not happen easily. Accompaniment is required to ensure understanding of the change and its prescriptive elements. Accompaniment—including training—is thus necessary for the exercise to attain its intended purpose while taking resistance into account. Change cannot come about by force—this would compromise the consistency required for success in the short, medium, and long term.

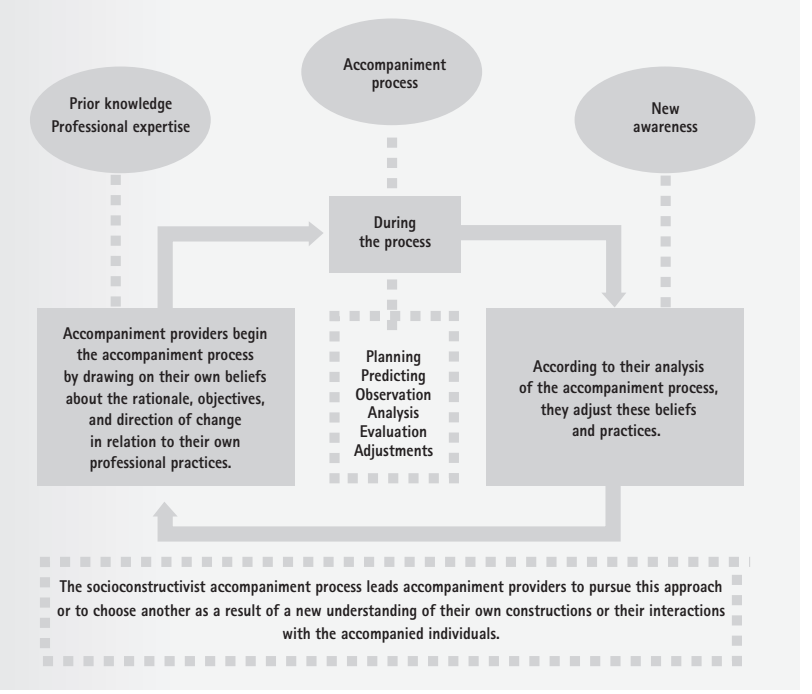
**Accompanying prescribed change aimed at updating professional practices**

When accompanying prescribed change, accompaniment providers present a practice model, which can vary from one provider to another but is in harmony with the foundations of the desired change. In other words, those who accompany guided change have an understanding of the change that they are willing to share and discuss, and even modify. They understand the rationale, objectives, and thrust of the change and have assimilated or are in the process of assimilating it into their practice model. The practice model guides all the decisions they make and the professional acts they perform when engaged in the accompaniment process. They encourage the accompanied staff to apply the change while transforming and adapting it to their own practice models. They also take a number of personal considerations into account when accompanying a prescribed change aimed at updating professional practices: the cognitive, affective, metacognitive, and social dimensions related to their knowledge culture, communication, collaboration, and evaluation.

Accompanying prescriptive change is a rather complex process. It requires a clear understanding of the reasons for using accompaniment rather than more traditional training methods (occasional refresher/professional development training on various topics, problems, practices,

etc.). It is easier to understand the advantages of accompaniment if we look at it from a socioconstructivist point of view whereby accompaniment providers plan their interventions to generate sociocognitive conflict. They then must be able to recognize such conflict as it arises and put it to use (see also Lafortune and Deaudelin, 2001). However, they can only capitalize on it if the people being accompanied are aware of the conflict as it occurs and are able to step back from it. At first, this detachment is created by the accompaniment provider, and then gradually the accompanied individuals internalize the process and become increasingly able to step back by themselves. Distance enables participants to detect the process in action and understand how they can use it when accompanying others. The socioconstructivist perspective underlies a process in which shared reflections, interactions, and collectively analyzed actions lead to adjustments and then further action.

Figure 2
**Socioconstructivist Accompaniment Process**




Source: Lafortune and Martin, 2004, p. 53, inspired by Lafortune and St-Pierre, 1996.

The meaning imparted to accompaniment includes an educational dimension that fosters the development of theory from practice, and vice versa. The training provides examples, explanations, comparisons, and analysis; encourages participants to experiment and develop material; and gives them an understanding of various pedagogical and theoretical approaches. The educational dimension of accompaniment aims to lead the accompanied individuals, who subsequently become accompaniment providers, to develop ways of adapting and transferring what they learn in the meetings to a variety of situations and contexts. In other words, a key objective of accompaniment is to develop the professional autonomy of those engaged in the accompaniment process so they can implement lasting change based on a rationale that is quite different from the one underlying their previous practices.

Socioconstructivist accompaniment encompasses, to various degrees and according to circumstances, concepts of assistance, support, advice, communication, training, openness to others, interaction, mediation, evolution, and modeling, just to name a few. It also includes practices,

**Socioconstructivist accompaniment of change aimed at updating professional practices**

Socioconstructivist accompaniment of prescriptive change aimed at updating professional practices supports knowledge building on the part of accompanied individuals in interaction with their peers. This form of accompaniment calls for followup and continuity. From a metacognitive, reflective standpoint, it aims to mobilize past experiences to promote knowledge building and develop competencies and a knowledge culture. It also aims to precipitate sociocognitive conflict and take advantage of this conflict flowing from the group's reflections and discussions to coconstruct in the heat of the action, expose beliefs (concepts and convictions), and capitalize on the group's awareness of certain constructions. This process involves interaction between accompaniment providers and the people being accompanied. The various roles they play enhance the process and create a true partnership. Accompaniment takes into consideration various aspects of the individual, including cognitive, metacognitive, affective, and social dimensions. In terms of content, accompaniment combines theory and practice, and thinking and action, in an integrated, complementary fashion.

Socioconstructivist accompaniment entails the creation of a culture based on the foundations of the change. This culture expresses itself through five components—attitudes, knowledge, strategies, skills, and experiences—but also through the development and use of professional competencies involved in exercising leadership in the accompaniment process (inspired by Lafortune and Deaudelin, 2001; Lafortune and Martin, 2004).

methods, and strategies based on these concepts. Socioconstructivist accompaniment takes on an inclusive, complementary meaning through the concepts of reflection, coconstruction, metacognition, reflective practice, and followup. Continuing education as we usually understand it is thus redefined within the field of education by the integration of training and accompaniment. This integration of relevant aspects of socioconstructivist accompaniment into a structure that reflects the complexity of implementing prescriptive change puts the accent on process but does not ignore the content and objectives of the accompaniment. On the contrary, it is the dynamic nature of the accompaniment that builds cohesion between participants and ensures the coherence of the process.

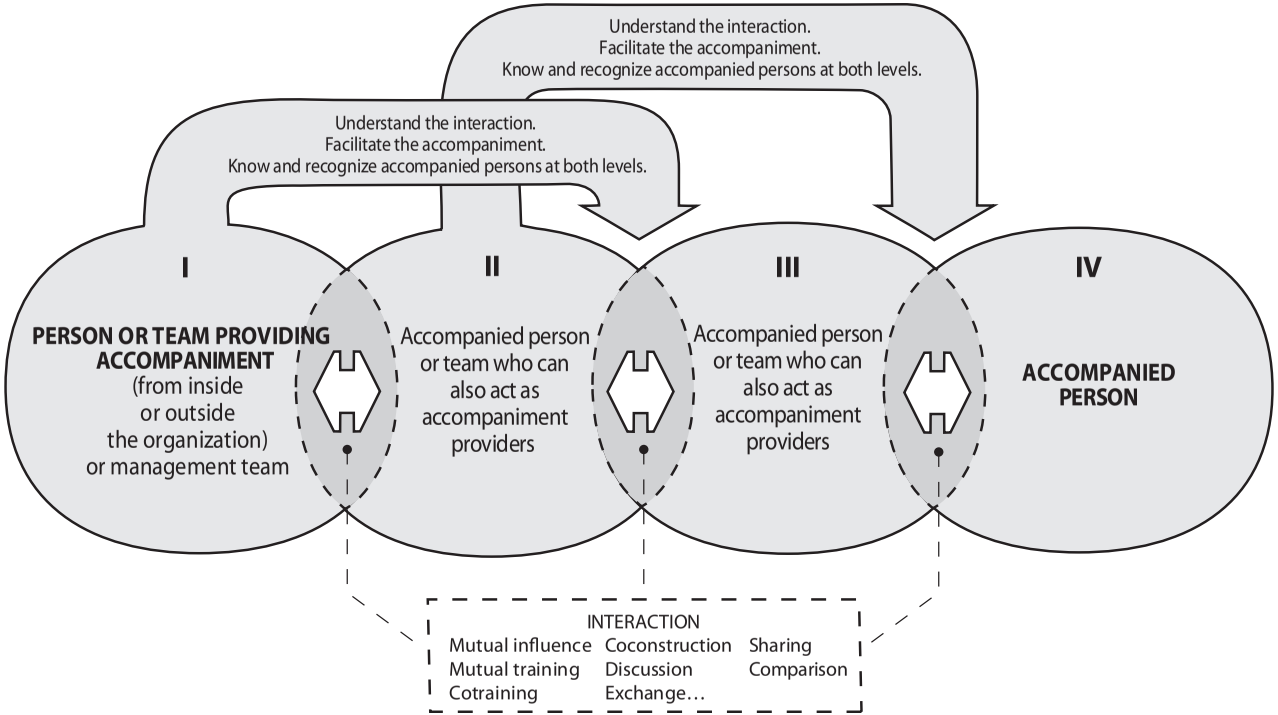
To complete the concept of socioconstructivist accompaniment to prescriptive change, a followup model describes a process in which a number of groups are either accompanied or accompany others.

Although at first glance, Figure 3 seems to present a hierarchical relationship between levels one and four, this is not what is intended—it is the interaction between levels that is important and that helps bring about the coconstruction process. Intervention at one level or another is not aimed at the group directly targeted, but at the accompaniment process itself and thus at the interactions between two groups of people. Moreover, certain people play a twofold role of accompaniment provider and accompaniment receiver. It is to ensure consistency between these two roles that the providers act with regard to those they are accompanying as those accompanied will have to act in accompanying others.

The following example will clarify this idea. To put an accompaniment process in place for teams of coworkers, an accompaniment team is created made up of a manager or a management team or an accompaniment provider or team (from inside or outside the organization) (I), who work in partnership with the individuals representing the teams of coworkers (II), while taking into consideration the accompaniment work that these teams carry out with their coworkers (III) and who also accompany people in their own work environments (IV). The first accompaniment team (I) does not work solely with the representatives of the coworker teams (II), but also takes into account the interaction between the coworker representatives (II) and all the people they accompany (III). This means that the first accompaniment team (I) must visit the groups being accompanied in order to understand the interactions, facilitate accompaniment, and get to know and recognize the accompanied persons in the two groups (II and III). This also gives them the opportunity to listen to comments about these interactions. The interactions involve a mutual process of influencing, educating, training, coconstructing,

Figure 3

## Interaction Dynamics in the Accompaniment Process



discussing, exchanging, sharing, comparing, and so on. Moreover, it is not necessary to have all four groups. For example, in an institution, organization, or company, a management team (I) can accompany work team leaders (II) who accompany individuals or work teams (III), and the management team can be replaced or accompanied by an outside expert. Depending on the type of accompaniment intended, the management team or outside expert (I) attends several meeting between leaders (II) and the accompanied teams (III) to understand the interaction and facilitate the accompaniment.

The various components that make up socioconstructivist accompaniment of a change process, as well as the interactions to consider in providing followup are detailed in the following guidelines for change.

## APPROACHES TO CHANGE

Accompaniment of prescriptive change offers six possible approaches to the competencies in this frame of reference, as follows.

### 1. Develop Leadership for the Accompaniment Process

The first approach is to develop a special type of leadership in the form of professional accompaniment requiring the development of accompaniment competencies. Exercising leadership in a socioconstructivist accompaniment for change involves sharing responsibility with the accompanied individuals and having a rigorous and consistent process. This can be a big challenge. This form of leadership is different from the familiar top-down style found in many organizations—one person influencing others, who agree to follow him or her. The type of leadership we are looking for in the accompaniment process emphasizes the number and quality of interactions between members of the group. Individual and collective strength serves as a vector for change. It draws on collaboration between individuals in a group or organization, who contribute the fruit of their reflections and discussion to a shared vision. It entails collaborative work, an understanding of concepts, autonomy, solidarity, and creativity, all of which are the necessary ingredients of a collective undertaking (Amherdt, Dupuich-Rabasse, Emery, and Giauque, 2000). Instead of imposing a vision of the change, this form of leadership seeks to develop a shared understanding and vision *with* and *for* the people targeted by

the change in order to better support them in the accompaniment process and in updating their practices or developing professional competencies for accompanying change.

**Accompaniment leadership**

Accompaniment leadership is a process that orients professional practices by providing direction for change. It is exercised and developed through individual and group reflection and through interaction with personnel affected by change. Leadership of this kind builds awareness and leads to initiatives that are developed, carried out, analyzed, evaluated, adjusted, and revisited in a spirit of professional collaboration. This process is part of reflective practice where reflection and practice analysis pave the way for the development of models of practice and professional competencies for accompaniment.

The concepts of leadership and accompaniment are paired to show that the process of influencing people to change their professional practices requires reflective practices (participants reflect on and analyze practices and develop their own practice models). This reflection is both individual and collective (Lafortune, 2005b). In the collective process, interactions may lead to sociocognitive conflict and to beliefs and practices being contrasted or called into question. This interactive-reflective dimension is in keeping with the socioconstructivist perspective in that the accompanied individuals structure their knowledge and competencies by interacting with each other based on their understanding of the change and how they see their roles and tasks. This socioconstructivist accompaniment leadership encourages action initiation, establishment of links between theory and practice, network building, and development of an interactive-reflective practice and a culture based on the rationale behind the change. All this requires that the accompanied persons apply the results of their discussions or training over a long enough period to assimilate the changes and new ways of doing things and initiate action.

## 2. Engage in a Reflective-Interactive Practice

The second approach is to engage change and create reflective-interactive practice communities. The purpose of the interactive-reflective process is to change practices by challenging, reflecting on, analyzing, and adapting one's own practices by, for instance, asking oneself whether these practices foster the development of competencies—those required by the

change. Reflection on practices can be partly individual, but it also requires collaborative work by the group, and that is where the interactive dimension of reflective practice comes in.

In this second approach, both the accompaniment providers and the accompanied individuals reflect not only on their own practices but also on those that are commonly used in their workplace. They then discuss them in the light of the new prescribed practices. Participants must be engaged in the change process for the interaction to be productive. There can be a straightforward exchange of ideas to start, but the real objective is for participants to submit their professional acts for discussion so that, ultimately, they change their practices. The point is to analyze past and future actions with the aim of perhaps calling them into question or challenging beliefs (concepts and convictions), in order to bring about changes—some greater than others depending on previous practices—while showing respect for others.

Thus, the participants reflect on and examine their own practices and compare them with those of others as well as with the new prescribed practices. This process inevitably calls into question certain practices and can change how both the accompanied individuals act—and even how the accompaniment providers act—or lead them to adjust their practice models. The changes often occur gradually, bit by bit, because the model evolves as the group's reflective process progresses, but also because of how participants adjust their workplace practices to the accompaniment process between meetings. Doing so enables them to test, analyze, and adapt certain aspects of the accompaniment process. They are able to observe and discuss problems and questions related to the rationale for the change and thus assimilate it more effectively in order to better accompany affected staff. Interactive-reflective practice fosters awareness, which in turn transforms and even improves practice models. It is thus an excellent means of updating practices.

## 3. Spur Professional Collaboration

Accompanying the process of establishing professional collaboration means helping coworkers work as a team. Professional collaboration is closely tied to networking. It creates interactions that require collective effort and spurs discussion that leads to collective decision making and concerted action. These actions are analyzed and adapted by the group. This leads to shared responsibility for the process of accompanying coworkers in developing competencies. This professional collaboration

manifests itself in teamwork between coworkers, which entails collective action such as discussing decisions to be taken, sharing ideas on how to resolve a problem at work, or identifying problems that need to be solved.

## 4. Develop Professional Judgment

This fourth approach illustrates the value of developing professional judgment both in decision making about accompaniment and in the implementation of change. It therefore entails more than simply judging the effectiveness of the change or deciding how to implement it. From this frame of reference's perspective, one way is to exercise and develop professional judgment in various decision-making situations, including evaluation. This avenue was explored because professional judgment can be exercised by a single individual when making a decision, but also by a team, whose members benefit from each other's point of view. Professional judgment was also considered in developing professional competencies and where staff members face complex, unusual, or even completely new problems. These problems cannot be resolved using ready-to-go, paint-by-number procedures, recipes, or techniques. This type of situation forces professionals to draw on their expertise (experience and training) and seek solutions that are then discussed in order to validate, question, and improve on them. This makes people more confident about the solutions and enables them to adapt as needed, in light of comments from coworkers. Furthering the concept of "professional judgment" is a prerequisite to developing and evaluating competencies.

## 5. Enrich the Knowledge Culture

Significant, prescribed change requires enriching the knowledge culture of both the accompaniment providers and those being accompanied. It helps participants understand the foundations of the change and develop the necessary autonomy to adjust their practices. In a changing world, this cultural enrichment is acquired through continuing education and an ongoing process of updating practices. To be or become accompaniment providers, people must enrich their knowledge culture to help the accompanied individuals establish links between theory and practice.

The knowledge culture also contributes consistency and relevance to the accompaniment process and helps provide its theoretical underpinnings. We can question, however, how broad and deep this culture should

be. According to Lafortune and Martin (2004), the knowledge culture is not limited to a knowledge repertoire. It is a set of attitudes, knowledge, strategies, skills, competencies, and experiences that enable accompanied individuals to develop their critical judgment, creativity, objectivity, and confidence. The knowledge culture is active in the sense that the accompaniment providers mobilize their resources and repertoire of examples in the accompaniment process. This requires that there be a relationship between proposed actions and the theoretical foundations put forward (adapted from Lafortune and Martin, 2004).

Enrichment of the knowledge culture helps provide accompaniment that incorporates the training necessary to understand the rationale for the new practices and share with coworkers a clearer understanding of the change. It gives accompaniment providers credible arguments to counter resistance to change. This does not mean "converting" or "indoctrinating" the accompanied persons, but rather leading them to reflect on the objectives and scope of the change as well as the reasons behind it, in order to move people's thinking beyond the meetings and lead them to gradual change.

## 6. Initiate Action from a Reflective-Interactive Perspective

The sixth approach presupposes that a change process inevitably leads to actions that reflect the objectives of the change. Initiating action is a pivotal step, and is often difficult to do because change, especially if it is significant, forces people to adjust their intervention models. These adjustments vary with the individual, for some people it will go so far as to radically call their professional practices into question. Initiating action is essential to implementing practices based on the theoretical rationale behind the change. The process can take place in two phases: (1) participants describe practices or experiences that are in keeping with the change and are based on interactive-reflective feedback on current practices in the workplace, from which they draw inspiration and learn to provide feedback on other experiences, and (2) the accompanied persons are accompanied collectively or individually in developing and testing action plans. These two phases induce people to try out certain actions or experiments that incorporate the change or its accompaniment and encourage them to support the change process. Taking action requires: (a) a plan developed by the group, (b) experiments that have been tried or actions that have been carried out, (c) followup, (d) individual and collective analysis, (e) adjustments, and (f) a record of the process.

The reflective-interactive perspective cuts across all these approaches, which means that reflection and action complement each other. This is reflected in principles inspired by Lafortune and Deaudelin (2001) and by St-Germain (2002).

## PRINCIPLES OF REFLECTION AND ACTION COMPLEMENTARITY IN THE ACCOMPANIMENT PROCESS

Eight principles illustrate what we mean by complementarity between reflection and action in the accompaniment process.

- *Take into account the knowledge, competencies, and previous experiences of the people for whom the change is intended.* This allows the accompanied persons to move forward from where they are in the present, while reflecting on changes in their practices.
- *Cast a critical eye on the consistency (or inconsistency) between beliefs and practices, thoughts and actions* (Lafortune, 2004b; Lafortune and Fennema, 2003; Thagard, 2000). This critical perspective can help generate, acknowledge, and benefit from the unsettling effects of change while reassuring staff who feel insecure. It requires an open attitude to differing points of view, which spurs creativity and acknowledgment of innovation.
- *Adjust on the go.* Such adjustments help people deal with novelty and force them to look at what they do, why they do it, and how it relates to the desired change. They also are a way to benefit from this greater awareness so that it leads to actions that move the accompanied persons forward.
- *Take into account the ideas, reactions, and questions of the group.* This requires people to accept the unexpected, something that is unavoidable in a situation of change. People also need to consider ideas, reflections, and discussions and assimilate them into the group reflective process.
- *Begin the process of self-reflection.* Proposing change and seeing that change is implemented requires people to engage in a process of self-reflection about their professional practices so that their intentions are consistent with what they actually do and what they tell others to do.

- *Begin the process of collective reflection*. The self-reflection process is fueled by group reflection that leads members to analyze their practices and exchange critical observations.
- *Develop a sense of ethics*. Developing a sense of ethics requires an opportunity to think about how to behave toward others (Gohier, 2005), "a stepping back and an ability to analyze practices from a theoretical point a view, [an] attitude that opens the door to taking a critical look at morality and personal choice" (Ottavi, 2004, p. 54 [translation]).
- *Create a climate of confidence and an atmosphere that foster coconstruction*. Group discussion is not enough to create a climate of confidence and an atmosphere that foster coconstruction—the group must generate ideas and a collective construct that takes into consideration the contributions of all members of the group.

A certain number of characteristics are typical of people who exercise leadership in the accompaniment process. Some of these characteristics are usually associated with leadership, such as communication, problem solving, conflict resolution, and the ability to rally people to a common cause. Other characteristics relate to the development of personal qualities like tolerance for ambiguity and acceptance of cognitive dissonance and the ability to foster an open attitude to others (see St-Germain, 2002). These qualities spur the development of the professional competencies used in accompaniment, including the eight competencies presented in the following chapters.

COMPETENCY 1

# Take a Stance Conducive to the Process of Accompanying Change

COMPETENCY **1**

## TAKE A STANCE CONDUCIVE TO THE PROCESS OF ACCOMPANYING CHANGE

### PROFESSIONAL ACTS

1. Engage in a socioconstructivist accompaniment process
2. Understand the foundations of the change
3. Adopt a critical and reflective stance with regard to the change
4. Build, explain, and justify a vision of the change
5. Draw on and enrich one's knowledge culture based on the foundations of the change

**ACTIONS**

### As an Accompaniment Provider

- Take risks
- Broaden your understanding of the change
- Be aware of actions taken
- Reflect critically on your actions
- Adopt a learning stance
- Share and explain your vision of the change
- Draw on and enrich one's culture based on the foundations of the change

### When Accompanying Others

- Interact and construct collectively
- Encourage reexamination of ideas
- Discuss the change
- Compare beliefs and practices
- Analyze the change
- Interrelate the components of the change
- Develop a discourse and arguments in favor of the change
- Act in a way consistent with the change

## COMPETENCY 1: CONCEPTUAL BACKGROUND

When implementing a prescribed change, accompaniment must be thought out carefully, spurring reflection about the actions to be taken, actions that are consistent and coherent with the change. Accompaniment, buttressed by training and followup, is provided over the course of a number of meetings. It is part of the process to implement change, update practices, and develop professional competencies from a socioconstructivist perspective. As such, the persons being accompanied learn to accompany other staff members who are also part of the process of change.

By encouraging a critical examination, questioning, and analysis of the actions, this type of accompaniment spurs people to reflect on and update their practices. The socioconstructivist perspective includes a period of reflection and interaction during which the individuals' practices and beliefs (teachings and convictions) are challenged. It also gives rise to sociocognitive conflict, which can foster coherence as individuals become aware of their own inconsistencies by verbalizing, sharing, and discussing them with others.

Providing accompaniment requires certain professional skills. The knowledge culture and the values of the individuals who compose it affect the way the accompaniment is provided and, consequently, contribute to professional development. The clash of ideas and the dialog and sharing with other educational workers can spark conflict and even lead to a questioning of certain beliefs, but they are vital in helping the workplace evolve and eventually bringing about a shared vision of the change.

Over the course of a socioconstructivist accompaniment process, the accompaniment providers and those being accompanied test their model of professional practice against the one proposed by the change. This examination of practices spurs individual and group reflection. The aspects that are subsequently discussed can include points of theory that are reflected in current practices and the evolution of these aspects in the process of change. This "professional" accompaniment is part of a professionalization process that aims not to help people improve the aspects they wish to put into practice, but rather to support the implementation of new practices that can raise questions, doubts, and concerns.

**Accompaniment**

Accompaniment is a form of support based on a process of professionalization. It calls for coherence between the work of accompaniment providers and the goals set for the people they accompany in accompanying others in turn. The process involves a form of modeling that uses a working example transposable into a workplace or group accompaniment situation. It is designed for those people implementing changes that demand modifications to professional practice, with all the questions, apprehensions, uncertainties, ambiguities, and risk-taking that this entails. It requires reflective-interactive practice on the part of the accompaniment providers as well as those being accompanied.

Accompaniment should ideally be conducted in collaboration with the workplace community being accompanied. Accompaniment recipients who in turn become providers transpose the accompaniment model by adapting the approach to their particular situation. To do so, they are encouraged to document the accompaniment process and the results in their workplace. This makes it possible to track the progress of the accompanied persons and groups. Such accompaniment presupposes a certain leadership in accompanying a change that requires a context and conditions conducive to its success. In organizational terms, this context and these conditions correspond to certain key points described below.

The accompaniment in this frame of reference is aimed at groups. It is provided over a period of several days and usually continues for more than one year. This helps promote the process of change and the integration of its rationale and content, and spurs people to action by offering support to those who will, in turn, accompany other groups. This method requires varying degrees of followup to support implementation of the change. In addition to meetings, there are followups, e-mails, and phone calls, and there can also be one-on-one or smaller group meetings. Followups serve to clarify the content discussed at the meetings and help in planning actions and facilitating the dissemination of the appropriate accompaniment tools and materials. Followups also spur action and are an assurance that action gets taken.

The dyadic accompaniment recommended herein draws on the complementarity of expertise. It respects the accompaniment process while ensuring continuity and the stability of groups in the event of staff turnover. It is crucial to determine the desired accompaniment format from the outset to ensure participants engage in the process. This helps in preparing the training (planning and predicting) by prioritizing the desired

actions, and thereby avoiding unplanned choices or the juxtaposition of a patchwork of training ideas that run counter to the foundations of the change.[1]

**Accompaniment process**

The accompaniment process is a dynamic process that fosters action and leads to change. It involves a set of professional acts with defined aims that are planned and structured from a socioconstructivist perspective on the basis of a partnership with a specific workplace community. The process includes strategies for leading discussions, training, and accompaniment and draws on various tools (self-questioning, interaction, coconstruction, reflection, analysis, modeling, etc.). It is an assistance, support, and mediation measure designed to help individuals within a group to move forward and develop professional autonomy while taking into consideration the cognitive, metacognitive, affective, and social dimensions.

From a content perspective, accompaniment combines theory with practice and reflection with action in an integrated, complementary manner. Implementation of this process calls for a culture that manifests itself in attitudes, knowledge, strategies, abilities, and experience, but also through the development and exercise of professional competencies associated with accompaniment leadership. By its duration and continuous nature, the process encourages change and helps ensure that its foundations, aims, and content are assimilated in a lasting way. More generally, it fosters linkage initiatives to create mutual aid, professional collaboration, and communication networks regarding the change (also see Lafortune and Deaudelin, 2001; Lafortune and Martin, 2004).

It is crucial that the accompaniment providers grasp the challenges of the change to be implemented and understand the need for accompaniment. This requires that they discuss with the accompaniment recipients the origin and nature of the changes, the resistance it can generate, and the accompaniment conditions, means, and context to be created.

1. Based on the experiment conducted for the project at the root of this frame of reference, group meetings should ideally bring together 16 to 24 people and be spread over more than one year to support the transition from one year to the next and any staff turnover. The number and duration of meetings can vary, but generally speaking, it is important to meet for the equivalent of 4 to 8 days over the course of the same year. To ensure the process and content are well integrated and the change is implemented, meetings should be held over a minimum of 6 to 8 days and anywhere up to 12 to 16 days. Meetings held in blocks of two days at a time can ease the process, especially in the initial stages.

Leading an accompaniment process requires adopting a specific stance that assumes that accompaniment providers

- Can also be accompanied
- Modify their model of practice by interacting with accompanied individuals
- Act in a manner consistent with the work the accompanied individuals must accomplish
- Assimilate the theory and practice required to understand the change, take ownership of the change, and integrate theory and practice into their comments and actions

## UNDERSTANDING PROFESSIONAL ACTS ASSOCIATED WITH COMPETENCY 1

Taking a stance conducive to the process of accompanying change calls for professional acts and actions. The following are the main professional acts and certain actions that help better circumscribe this competency:

- Engage in a socioconstructivist accompaniment process
- Understand the foundations of the change
- Adopt a critical and reflective stance with regard to the change
- Build, explain, and justify a vision of the change.
- Draw on and enrich one's culture based on the foundations of the change

### Engage in a Socioconstructivist Accompaniment Process

Engaging and getting others to engage is key to accompanying a change. Depending on the perspective, such engagement can take on various meanings. Certain concepts such as motivation, participation, and involvement are sometimes used as synonyms for engagement. While the notions may be similar, there are a few distinctions.

In the accompaniment process, individuals commit of their own free will. It is a voluntary, conscious decision. They define, speak to, and demonstrate their engagement through their actions. According to Kiesler (1971), the notion of engagement is tied to the acts an individual

consciously and freely carries out. These acts help distinguish between engagement and motivation (Kiesler, 1971, cited in Pirot and De Ketele, 2000). Manifestations of an individual's engagement can be observed in the individual's attitudes and actions, which allow others to perceive a certain level of commitment and to interpret and qualify it. For a number of authors (Goodell, 1969, and Pauchant, 1996, cited in Duchesne, 2004, and Hardy-Lapointe, 2001), engagement is a professional act. In the accompaniment process, engagement translates into individual and group actions such as teamwork among colleagues, experience sharing, decision making, leadership, and others. Professional engagement is based on individuals' intent and willingness to implement their power to act in keeping with the conceptual thread of working toward the development of their professional competencies for accompaniment. Being engaged therefore means putting oneself in a professional development situation.

## *Dimensions of Engagement*

There are various dimensions, types, and levels of engagement. From a socioconstructivist perspective, engagement develops and transforms itself in contact with others and the environment. This means we have to take into account the affective, cognitive, metacognitive, and social dimensions of engagement as well as the conditions and factors that may impact, positively or negatively, its strength and scope.

## *Types of Engagement*

Engagement can refer to individual or group engagement. Group engagement is a meaning construction process that underlies the concept of group responsibility. Group responsibility calls for consensus building, interinfluence, and professional collaboration. Individuals can ask themselves to what degree they are engaged in the teamwork or the change while the team asks itself to what degree it is engaged in the same change.

## *Reflective Engagement*

The important responsibility of getting staff to engage in a process of change calls for a reflective engagement. Individuals are encouraged to see the engagement not only in terms of time, but also in terms of the quality of their reflection. Engagement in a reflective practice calls for reflection and the examination and analysis of one's professional practices with regard to the change to be implemented.

## *Professional Engagement*

Interaction with colleagues, recognition of certain common values, and an investment in duties linked to the process of change all help promote the transition from a personal to a professional group engagement, which manifests itself through an openness to others and involvement in motivating staff to take action. In examining the dynamics leading to the construction of a community of practices, Charlier (2006, p. 170, citing Wenger) defines engagement as an "active involvement in a mutual meaning construction process."

## *Characteristics of an Engaged Individual*

In the specific context of change accompaniment, engaged individuals take initiative and action above and beyond what is required of them, enjoy personal and professional fulfillment (they like and believe in what they do, and enjoy doing it), have a positive attitude towards daily challenges, show an openness towards their profession, are involved in action projects and group projects, and are good workplace resources. Their self-confidence leads them to play a leadership role and use their capacity for action with their colleagues. They are proactive, develop their skills, take risks, question themselves, exert their professional autonomy, demonstrate an ability to adapt, are open to change, and take a professional development stance. These characteristics cannot all be adopted to the same degree by a single person. The main characteristic of individuals committed to a change is their ability to recognize their strengths and the aspects of their engagement they need to improve.

## *Role of Accompaniment Providers in Creating Conditions Favorable to Engagement*

Accompaniment providers never lose sight of the fact that changing ways that are sometimes firmly rooted does not happen overnight or simply because such a change is decreed. How does one take into account the legal, moral, and ethical obligations to foster the intrinsic engagement of personnel? The challenge and role of the accompaniment provider is therefore to help accompaniment recipients understand the need, necessity, and importance of considering these obligations and responsibilities as professionals. In this way, the accompaniment provider creates a fertile climate for engagement in which the accompaniment recipients can realize the importance of updating their professional practices.

## Understand the Foundations of the Change

Change accompaniment requires knowledge, ownership, analysis, and probing of the foundations, concepts, and components of the change, especially when it entails certain prescriptive aspects. An understanding of the change goes a long way to enriching the knowledge culture and the workplace. Enriching this culture involves acquiring and sharing with others the means to learn about, understand, and analyze the change to be implemented. It requires taking ownership of the content of other documents, discussing them with colleagues, comparing representations, sharing points of view, consulting resources, etc. By discussing the foundations of the change, as well as its components and its impact on practices, participants can further explore the theme, e.g., cognitivism, constructivism, and socioconstructivism, and gain a better idea of the interrelation of the various components of the change, for instance, the competencies to be developed and professional practices to be put in place.

## Adopt a Critical and Reflective Stance with Regard to the Change

Having the professional competencies required to provide leadership to accompany change while bearing in mind the need to continue developing one's own competencies and helping the individuals being accompanied do the same requires taking action and being aware of the actions taken. Playing an accompaniment leadership role requires careful reflection and an ability to look critically at one's own strengths, limits, and challenges in relation to one's professional actions. This translates into creating challenges for oneself, having action plans to implement, developing effective means to motivate others, and engaging in reflection, on one's own or with others. This presupposes a learning stance in which sociocognitive conflict gives rise to moments of uncertainty.

While the socioconstructivist perspective of accompaniment promotes interaction, it also engenders comparison and contrasting of various types of expertise, representations, and professional experiences. This interaction paves the way for analysis and criticism of aspects of the knowledge culture in an area of expertise and a setting undergoing change, or with regard to the updating of practices and the development of professional competencies. Through reading, debate, discussion, and comparison, individuals gradually and critically take ownership of the

change and the objects of its culture while expanding their understanding of its various components. The development of a culture spurs people to adopt a critical stance to nourish debate, discuss various positions, dismiss or support points of view, and maintain a critical distance vis-à-vis the change.

## Construct, Explain, and Justify a Vision of the Change

Providing accompaniment in the process of change, updating practices, and developing professional competencies requires that one constructs a representation of the change in order to communicate to others one's vision of it so as to help formulate and contrast the various representations and beliefs (conceptions and convictions) of the staff affected by the change in question. This consists of bringing these conceptions to the fore through discussions that explain them in greater detail. In education, for example, the goal is to turn attention to conceptions of education, learning, and evaluation. These discussions can also lead to an examination of inconsistencies and disconnects between beliefs and practices, provided the goal is to raise awareness and adjust practices.

This understanding of conceptions is essential to the intervention and facilitates the choice of accompaniment situations while respecting the zone of proximal development (ZPD) of the accompaniment recipients and thereby creating unthreatening cognitive dissonance (dissonance in cognitive terms, unthreatening in affective terms). The change accompaniment providers must understand the culture associated with the change. By taking ownership of the message about the change, they can explain their vision of it by providing illustrative examples together with justification and arguments to help people understand it better.

Enrichment of the knowledge culture associated with a specific field and workplace or organizational culture helps provide the accompaniment and training necessary to understand the theoretical foundations for change. It encourages an informed reading of change with the workplace community by providing a credibly argued vision for those resisting the change. A more comprehensive culture with regard to the foundations of the change helps people develop a more critical stance vis-à-vis the applied or proposed practices. That way, people gain a better understanding of—and can help others to understand—the prescribed change and develop a discourse and arguments to foster discussion (Lafortune and Lepage, 2007).

## Draw on and Enrich One's Culture Based on the Foundations of the Change

Drawing on and enriching one's culture based on the foundations of the change is essential to implementing an accompaniment process. In addition to developing one's own culture, providing accompaniment requires an ability to spur others to develop theirs, too. This culture of reflection and action buoys interactions. For accompaniment to be integrated into training, one must return to the foundations of the change and its culture. Collective discussions and reflections can suggest transferences for various accompaniment situations, up to and including daily practices. Moreover, during the accompaniment process, existing ties between theory and practice are strengthened, as theory nourishes practice, and practice generates emerging elements of theorization that are inspired by practices in the workplace targeted by the change.

To enrich their culture, individuals read up on the issues and make connections between the concepts underlying the change, their professional experience, and their past training. This helps them move forward together with others, and provide their input and justification in working toward a shared vision of the change. This culture helps participants gain awareness of the ways the process can be carried forth by observing their own behavior during the accompaniment process, by reflecting interactively with colleagues, and by preparing to act in turn within their workplace (Lafortune and Lepage, 2007).

The development of a culture associated with change boosts the confidence of accompaniment providers, giving them a leg up on the people being accompanied. They become skilled at making their interventions more pertinent since they are involved in providing accompaniment training for others at the same time as they, too, are undergoing an accompaniment experience (Lafortune and Lepage, 2007). The need for a more comprehensive culture to ensure coherence, pertinence, and the theoretical foundations for an accompaniment process is an idea worth exploring further, especially as concerns the content of such a culture with regard to the duties and roles of the accompaniment providers.

The reflection and actions revolving around such diverse themes as reflective practice, accompaniment meetings, the transversality of certain competencies, evaluation, teamwork with colleagues, professional judgment, evaluation accompaniment, and consideration of the affective dimension in accompanying change all help enrich the interventions of

those being accompanied. These themes help promote action leading to the adaptation, transposition, or modification of the various guided interventions in light of the prescribed change.

To conclude, the competency "Take a stance conducive to the process of accompanying change" is essential since accompanying change would be unthinkable without first implementing a carefully thought out and structured approach. This implies developing skills, carrying out professional acts and actions, and creating the right conditions. Lastly, it is important to understand the change, to buy into it, and to act in accordance with the fundamental requirements and orientations of the change.

## QUESTIONS FOR REFLECTION Associated with Competency 1

*"Take a stance conducive to the process of accompanying change"*

At the beginning or during the process

- What is meant by "understanding the foundations of the directed change and its prescriptive aspects?"
- What is meant by "a critical and reflective analysis of aspects of the culture associated with the change?"
- What is meant by "comparing and contrasting various beliefs and practices?"
- How can peers play an important role in developing a clear vision of the change to be implemented?
- What acts or actions are a sign that a person is professionally engaged?
- What are the characteristics of a professionally engaged person?
- What range of engagement is likely to be observed in people being accompanied in a process of change?

During or at the end of the process

- How critical is the engagement of persons accompanying and being accompanied in a process of directed change with prescriptive aspects?
- What links can be made between having an understanding of the foundations of the change and possessing a knowledge culture associated with the area of expertise and workplace being accompanied?
- What are the possible aspects of the knowledge culture (knowledge, skills, and attitudes), depending on the role played in implementing the change?
- In what ways can taking a critical stance help promote acceptance of the change?

COMPETENCY 2

# Model Reflective Practice When Accompanying Change

COMPETENCY **2**

## MODEL REFLECTIVE PRACTICE WHEN ACCOMPANYING CHANGE

### PROFESSIONAL ACTS

1. Adopt and encourage reflective thinking and a reflective stance
2. Integrate reflective practice into one's model of practice
3. Develop one's model of practice

**ACTIONS**

### As an Accompaniment Provider

- Think about and analyze one's own practice
- Be open to new avenues for reflection and action
- Adjust one's practice
- Identify the characteristics of one's model using reflective practice
- Adapt one's intervention model

### When Accompanying Others

- Solicit reflection on one's practices and those of others
- Compare one's viewpoint with that of others
- Question ideas, beliefs, representations, and practices
- Introduce new avenues for reflection and action
- Raise doubts and spur new thinking on ideas, beliefs, representations, and practices
- Provoke sociocognitive conflict
- Translate reflective components into actions
- Engage in action based on reflection and in reflection based on action
- Interact and analyze by questioning ideas, beliefs, representations, and practices
- Foster and spur reflective practices

## COMPETENCY 2: CONCEPTUAL BACKGROUND

Several expressions denote the process of reflecting on and analyzing one's practice. Donnay and Charlier (2006) use the expressions "analysis of practices," "reflective approach," and "reflective practice" to express this idea, while Perrenoud (2003) sticks to "reflective practice." In the field of education, one expression may have different meanings, and more than one expression can be used to communicate the same idea—all of which is somewhat confusing. We use the term "reflective practice" in this frame of reference as it is the one that is the most clearly defined in the literature (Lafortune and Deaudelin, 2001; Schön, 1994; St-Arnaud, 1992) and best represents the meaning of the second professional competency for accompaniment. It has three components—reflecting on and analyzing one's practices, initiating action, and building an adaptive model of practice (from Lafortune and Deaudelin, 2001). These three elements involve actions or experiences, as well as adjustments flowing from individual and collective analyses.

**Reflective practice**

Reflective practice is the act of stepping back to critically examine one's operating modes and analyze, both individually and collectively, the acts and actions carried out in the course of a professional intervention. This critical perspective involves an awareness of one's consistencies and inconsistencies, thoughts and actions, and beliefs and practices. It comprises three components—reflecting on and analyzing one's practices, initiating action, and building an adaptive model of practice.

Reflective practice evolves over the course of peoples' careers and in response to their various experiences. The reflective process creates a dynamic whereby they continue to progress in their fields through ongoing assessment of their intentions, objectives, goals, beliefs, and values. It entails engaging in a continuous process of constructing the theoretical foundations of one's practice, either individually or by interacting with others (from Perrenoud, 2003). In fact, reflection becomes an integral part of the professional practice of staff who accept these principles.

Donnay and Charlier (2006), who mainly use the term "analysis of practices," propose three functions of this activity: 1) to understand one's practice, 2) to change one's practice, and 3) to become more professional. For these authors, analyzing practices improves people's understanding of their practices by helping them build, based on their experiences, the theoretical and practical knowledge by which they can explain the

meaning of their actions. It also is a way of changing their practices because after analyzing their experiences and comparing them with those of their colleagues, individuals can adjust their actions or make different choices the next time around. This type of analysis also helps improve the professionalism of staff affected by the change as it gives them "a better handle on work situations ... [and] a reflective analysis [of their] practice [makes] possible ... the transfer of the acquired experience to other situations" (Donnay and Charlier, 2006, p. 88 [translation]).

In the conceptual background outlined here, the process of reflective practice has three phases: (1) reflecting on and analyzing one's practice, (2) transferring what one has learned to future action and consideration of these experiences, and (3) developing an adaptive model of practice.

## *Reflecting on and Analyzing One's Practice*

Reflecting on one's practice involves describing it in such a way that others can understand it well enough to be able to use various aspects of it for their own purposes. Analyzing entails making connections and comparisons, and providing justifications and explanations. It requires a willingness to accept having one's ideas and practices called into question and challenged by colleagues. This means that reflecting on and analyzing one's practice must not be limited to discussing what has been done with a group of accompanied individuals. Reflection and analysis are only useful if they involve an intention to change practices.

Analyzing and reflecting on one's practice consists of examining its various aspects—past or future actions (interventions, approaches, strategies, etc.), competencies and skills acquired, knowledge built, and attitudes adopted. It also involves establishing links between these various aspects. For example, in the field of education, links can be made between various pedagogical approaches in use (and also discussed), such as cooperative learning, project-based pedagogy, strategic teaching, and so on. These links also have to be understood, which is achieved by describing the approaches and explaining why one approach was chosen over another and how they were implemented; by describing the reactions of the accompanied individuals and discussing the reasons for these reactions as well as their consequences; and by pinpointing and explaining difficulties encountered and successes achieved to both oneself and the accompanied individuals. It could also be added that the advantage of analyzing one's practices with colleagues is that actions can be compared and contrasted and people can become familiar with other approaches and other ways of analyzing practices. All of this helps them

build their models of practice and develop representations that ensure consistency between beliefs and practices, and thoughts and actions (Lafortune and Fennema, 2003; Lafortune, 2004a; Thagard, 2000). Thus, reflecting on and analyzing one's actions leads to changes in practices in keeping with the foundations of the prescribed change.

## *Initiating Action*

In a process of reflective practice, initiating action is a necessary step in expressing the level of reflection and the relevance of the analysis. Initiating action requires people to achieve a deeper level of awareness in order to bring about lasting change. It is part of the transference process that results from reflection and analysis, and it leads to individual and collective reexamination of actions in order to foster interaction, debate (not confrontation), and adjustments in view of future actions.

Reflecting on and analyzing practices entails questioning one's previous practices and considering changes to one's actions in future interventions. Some people may say, "I can't believe I didn't do this before" or "I'll use what we did today and adapt it to my practice." However, in practice, in the rush of work, people forget what they intended to do, and the reflections and analyses do not necessarily translate into action. At other times, the new awareness does bring about changes in people's actions over the short term, but not viably over the long term. In light of these observations about accompanying reflective practice, it is clear that actions, and particularly opportunities for reviewing them, must be planned. In this way, people can set realistic challenges, meet them, and then reexamine them. Moreover, if actions are not successful, it makes it easier to examine what got in the way. It is, however, important to avoid judging the content of the actions and especially the fact that they were not successful.

This process of reflection, analysis, and translation into action and later review must be repeated several times before moving on to the third phase, which is when people develop their models of practice and explicitly describe how they conceptualize their professional activity or the accompaniment of people who intervene or provide accompaniment. People can improve their models of reflective practice by presenting them to their colleagues. The models evolve over the course of their careers as they review them from time to time and analyze, question, and adjust them as needed.

## *Developing a Practice Model*

Reflective practice also consists of building and adapting one's own model of practice (see Lafortune and Deaudelin, 2001). The process is divided into three parts: describing and explaining one's practice, presenting the theoretical and practical dimensions leading to particular actions, and studying existing models and adapting and reorganizing them into a coherent representation (text, diagram, table, drawing, list of categories, list of characteristics or principles, and so on). To build and develop representations of their models, people need to reflect deeply on their practices and analyze their beliefs (conceptions and convictions) in the light of their previous actions. The unusual and complex nature of the process creates a need for group accompaniment and for accompaniment providers to go through the same process and develop their expertise in this type of accompaniment (Lafortune, 2005a, b, 2007a).

### Model of Practice

For example, in education the model of practice represents in a way the educational professional's vision of teaching, learning, and evaluation. In a process of accompanying a change that involves prescriptive elements, the model of practice includes not only how individuals perceive the accompaniment process, but also the theoretical foundations, aims and intentions they have integrated or are in the process of integrating into their own models of practice. Their models of practice guide all their decisions and professional acts when accompanying others.

In developing their models of practice for accompanying change, people organize the representations, values, attitudes, and knowledge that guide their professional activity. They construct their models based on theoretical knowledge but also on their professional expertise (training and experience), the difficulties they have encountered in the accompaniment process, and their analysis of these difficulties (Cohen-Azria, Daunay, Delcambre, and Lahanier-Reuter, 2007).

### Model Building

Model building is a conceptual process used to develop models of professional practice that can subsequently be adjusted or modified on the basis of a person's knowledge culture or accompaniment experience. In engaging in a process of change, the accompanied individuals continuously

transform and adapt their own models of practice. In some respects, the models serve as a starting point (previous knowledge) from which to approach change as they seek to understand it.

### Modeling

During the accompaniment process, participants build their models by interacting with the accompaniment provider and with other members of the group. The accompanied person observes the behavior of the accompaniment provider, who sets an example by the way he or she intervenes and puts his or her model of practice into action through words and actions. By verbalizing their process in action (reflections, strategies, adjustments) or pointing out certain acts to those they accompany, accompaniment providers are "modeling," or providing an example in action. They think aloud, ask themselves questions, announce their intentions, and justify their decisions or choices. They make their strategies visible to help foster understanding, but also to encourage other people to use these strategies in their workplace. In addition, they help those they accompany see how these strategies can be transferred to new accompaniment situations or used with other staff affected by a change (Raynal and Rieunier, 1997).

Ideally, model building should precede modeling, because in order to "use oneself as an example," it is best to have built a model of practice ahead of time, to be in the midst of doing so, or to have integrated at least some of the attendant professional acts by developing the appropriate competencies and knowledge culture. In reality, not all accompaniment providers have clearly defined models of practice. This can lead to an example in action that is not always consistent with subsequent acts. However, thanks to its reflective-interactive perspective, the accompaniment approach fosters the construction of models of practice based on actions in response to the questions and reactions of accompanied persons. Even though the model rests on relatively solid foundations, it will continue to evolve throughout the person's career. When a major, prescribed change is being implemented, these foundations are often called into question. Professional accompaniment can be unsettling for some people because of the adjustments the change requires them to make, while other people have less difficulty adapting because they are able to accept—to varying degrees—the attendant adjustments.

Successfully implementing reflective practice depends on a number of characteristics of accompanied individuals and accompaniment providers, and on the particular circumstances of the accompaniment process.

Accompaniment providers

- Their commitment to reflective practice
- Their leadership style in the accompaniment process
- Their attitudes towards those they are accompanying and their vision of their practice and the prescribed change
- The accompaniment situations they choose

Accompanied individuals

- Their level of engagement
- Their desire to take action
- How they perceive the change in their practices
- Their personal and professional priorities

Particular circumstances

- Requirements of the institution, organization, or company
- Requirements of management
- Needs of accompaniment providers and those they accompany
- Individual affective, social, professional, etc., situations or attitudes of accompaniment providers and those they are accompanying
- Organizational structures
- Material and human resources
- Time allotted to reflective practice

To accompany reflective practice, accompaniment providers themselves reflect on and analyze their professional practices and develop their own models of practice, which they may situate in relation to the prescribed change. Reflective practice facilitates the change process, the updating of practices, and the development of professional competencies for accompaniment. It helps organize ideas and structure thinking, while also assisting in the preparation (planning and predicting) and evaluation of interventions. By replacing an intuitive process with a reflective one, people set up a dialogue between what they do, how they do it, and what they need to construct in order to change, update their practices, and develop their professional competencies.

The reflective process involves stepping back and taking a critical look at one's own practices, but also individually and collectively analyzing interventions and decisions made when taking action. A critical perspective requires greater awareness of one's consistencies and inconsistencies and possible disconnects between thinking and actions as well as beliefs and practices.

## UNDERSTANDING PROFESSIONAL ACTS ASSOCIATED WITH COMPETENCY 2

Modeling reflective practice when accompanying change involves professional acts and interventions. The following are the main professional acts together with actions that help clarify this competency:

- Adopt and encourage reflective thinking and a reflective stance
- Integrate reflective practice into one's model of practice
- Develop one's model of practice

### Adopt and Encourage Reflective Thinking and a Reflective Stance

Engagement in developing professional competencies for accompaniment is reflected in the relationship one has with oneself, with those being accompanied, and with colleagues. Others become a mirror—they call one's ideas into question, qualify one's remarks, and lead one to imagine new avenues for reflection and intervention. Their reflections raise questions and doubts, and spur new thinking on ideas, beliefs, representations, and professional practices. This stepping back process of comparison and reexamination makes for clearer, more precise thinking. Ideally people should adjust their actions to reflect their thinking, but the learning or change process can do more than just bring a few contradictions to the fore—it can be quite unsettling. It can underline inconsistencies or widen the gap between what one thinks and what one does. Yet a person who takes no risks can change neither how he or she thinks nor what he or she does. Risk taking is an intrinsic part of change.

In an accompaniment process, both the accompaniment providers and those they accompany undertake to reflect on practices—their own and those in the workplace—and to discuss them in the light of the

practices the change will usher in. People may sometimes share ideas, but it is uncommon for them to agree to discuss their professional acts with the aim of changing their practices. The innovative aspect of this approach also lies in the analysis of past and future actions with a view to perhaps having to call them into question and to compare and contrast them to beliefs (concepts and convictions) in order to bring about changes—some of them significant—to previous practices. It is quite rare to experience this type of process and even more so to do it in an atmosphere of mutual respect.

Adjustments occur gradually, bit by bit, because the model evolves as the reflective process progresses. The reflection is constructed with others and also by dint of the adjustments people make to their workplace practices between meetings. They are able to test, analyze, and adapt certain aspects of the accompaniment provided for the prescribed change. They observe and discuss problems and questions that arise and thus assimilate the change more effectively in order to better accompany others. Developing a reflective practice is an awareness-raising process that brings about change, usually for the better, in professional models and practices. It leads to the adoption of a reflective stance and way of thinking that, in an accompaniment process, involves helping others to do the same.

## Integrate Reflective Practice into One's Model of Practice

Accompaniment can foster the creation of practice and learning communities. The frequency and continuity of the meetings allow people to become more familiar with their strengths, interests, and limitations. They also share strategies, action modes, and expertise. This form of accompaniment involves moments of observation and reflection. The reflection spurs action and inversely, action can make people to think. Participants may also begin developing elements of theory based on their reflection. Each mention of taking time to reflect raises flurries of questions. It is best to say things like “take the time to” or “give ourselves the time to” reflect instead of “waste time” reflecting. In accompaniment, reflection does not necessarily hinder action. Reflection can lead to action and action is often the product of reflection. Reflection can occur during the process or after. Reflection and action are part of, complementary to, and contributory to the accompaniment process.

The complementary nature of reflection and action helps in implementing changes such as may lead to the development of competencies. It could be said that to learn how to competently mobilize various types of resources, link them up, and use them effectively in various novel situations, and to make adjustments on the go and use one's ability as a means to becoming competent or demonstrating one's level of competency, there must be a dialogue between reflection and action that involves pausing, reflecting, stepping back, exchanging, comparing, and discussing. Socioconstructivist accompaniment can facilitate this dialogue.

Generating sociocognitive conflict, recognizing it as it arises, and knowing how to take advantage of it can also nourish reflection and action with a view to change. The socioconstructivist perspective involves preparing (predicting and planning) interventions that aim to stimulate sociocognitive conflict. It also entails acknowledging the conflict and putting it to use. Taking advantage of it means accompanied individuals must be aware of the conflict as it occurs and be able to distance themselves from it. At first, the distance is created by the accompaniment provider, and then gradually the accompanied individuals internalize the process and become increasingly able to step back themselves. Detachment enables participants to see the process as it occurs and understand how they can use it when accompanying others (Lafortune and Lepage, 2007).

Cognitive dissonance arises when new information contradicts or differs from that which makes up the individual's cognitive repertoire. This new information calls into question constructed knowledge because it brings new understanding or clarifications that lead to changes in their representations. The new information forces people to make adjustments and modify their ideas, beliefs, representations, and practices with regard to whatever they are learning.

Accompaniment helps people learn to generate cognitive conflict that shakes up beliefs and practices, to recognize their own cognitive dissonance, and to make others experience it as well. Learning to deal with the dissonance helps people become more comfortable generating dissonance in others. As they become more at ease, they gain an understanding of how people learn and come to perceive conflict as a positive learning experience. Creating cognitive dissonance in others takes a certain amount of confidence in oneself to be able to accept the reactions of people in a state of cognitive dissonance. In discussing the learning process, some authors speak of "cognitive dissonance" (Piaget, 1974), while others use the expressions "sociocognitive debate" (Favre, 2001), "cognitive dialogue" (Barth, 1993), or "sociocognitive conflict" (Bednarz

and Garnier, 1989). These are all ways to foster learning, which paves the way to the construction of new knowledge that can help people along in the change process. Cognitive dialogue is a dialogue between what people already know (internal resources) and new knowledge (external resources), which can come from various sources (human or material). People go back and forth between past and new knowledge, but without being put in an uncomfortable position. They adjust their knowledge as they build and learn. This promotes a gradual deepening or modification of people's representations as they learn through a process of integration. In sociocognitive debate, participants interact in a more forcible way. In seeking to express themselves in a coherent way so that others will understand them, they are exposed to varying points of view and expect to hear opinions that are very different from their own. They undertake to "accept them as temporary hypotheses" (Favre, 2001, p. 14 [translation]). Sociocognitive debate creates a space for freely discussing ideas based on a reasoned explanation of various points of view. Depending on the quality of the debate and the strength of the arguments, people can decide whether or not to reinforce their own hypotheses. They can also change their opinions, beliefs, and representations or continue their reflection if opposing arguments are not entirely satisfying. If they are too unsettled, they can also decide to think about it and put off their decision till later. The respite allows them to assimilate the new information and reconstruct their knowledge on new foundations.

To spur reflective practice and engagement, accompaniment providers develop the art of posing questions. They plan moments of reflection, hold accompaniment meetings, and carry out reflective reviews. They stress the importance of evidence keeping to record both the process and participants' new-found awareness and to measure the groups' progress in implementing the change. They develop their own style of posing questions to build greater awareness and guide people towards action and the prescribed change.

Analysis is not limited to asking what has been done in the past but also why it was done that way, what reactions were observed, why people had these reactions, what was learned, what should be done next time, and the reasons for making these changes. All evidence should be recorded shortly after the process so that the analysis accurately reflects it.

Reflective practice requires people to be truly engaged in the process and to carry out the three phases of reflective practice: (1) reflecting on and analyzing one's practice, (2) initiating action, and (3) developing one's model of practice. People must not only reflect on their professional

practice, they must analyze it. Analysis involves examining a subject by breaking it down into its key elements in order to understand the links, manifestations, causes, consequences, problems and successes and to be able to construct a representation of the whole. Applying the principles of analysis to one's professional practices entails examining one's actions (interventions, approaches, strategies, training, etc.), competencies, skills, knowledge, attitudes, values, and so on in order to develop a perspective on one's practices and ensure consistency. Analyzing one's practice is a complex thinking skill that goes beyond simply describing or sharing practices. In an accompaniment process, it can be worthwhile to analyze practices using simulations that allow people to step back from their own practices and take a critical look at those that have been proposed.

## Develop One's Model of Practice

The accompaniment process aims to integrate reflection into people's practice model. In guiding the reflection of accompanied individuals, it aspires to make their interventions more and more reflective and lead them to use certain of these reflections in accompanying and monitoring groups. This could mean leading and structuring discussions so as to get people to reflect on how they work with adults undergoing the change process, or with people who resist the change or who think differently, and so on. Using reflective practice to ask questions and spur others to ask questions of themselves or of others can be a spur to action and change.

To integrate reflective practice into one's model of professional practice, one must reflect, observe, examine, analyze, and adjust one's way of intervening in a situation before, at the beginning, during, at the end, and after the intervention. This requires one to pay attention to one's professional practice, namely what one does and how one does it—for example, observing and questioning oneself and others, examining how one gives others the opportunity to speak and how one takes criticism and adapts during the process, etc.

Implementing a change aimed at developing competencies is synonymous with updating practices. For some, the change will raise many questions. It can also generate much uncertainty, to the point that people may question the leadership of those accompanying them. Accompaniment reveals the true importance and richness of reflective practice. It helps people update their practices, hone their professional judgment, analyze

the strategies and methods used in the accompaniment process, and develop competencies for accompaniment. This is why it is important to encourage and stimulate reflective practice.

Reflective practice is an individual process that leads to a more profound engagement. It spurs commitment, deepens reflection, and causes one to take a critical look at one's professional practice, which heightens one's presence, involvement, and awareness of others and how they react. Accompanying reflective practice requires that accompaniment providers themselves be committed to such a practice. Through modeling, they provide an example and spur others to engage in reflective practice.

Reflecting on and analyzing their professional practices helps one develop one's own models of practice. The model conceptualizes one's vision of professional action in that it identifies and explains its principal characteristics and provides concrete examples of actions. The model can be in the form of a diagram, text, network of concepts, and so on. However, any graphical representation of one's practice needs to be explained in order to clarify how it is linked to the prescribed change.

Modeling one's intervention through reflective practice means being an example—rather than giving examples—in order to help accompanied individuals engage in the practice. Developing and soliciting a reflective stance and way of thinking entails using feedback; learning and teaching others to keep evidence; questioning not only organizational aspects but also conceptual and material aspects; and improving knowledge culture. In accompaniment, these are methods accompaniment providers can use themselves, but it is also necessary to explain why it is important, even essential, that others do the same.

In conclusion, "modeling reflective practice when accompanying change" is necessary for two main reasons. First, asking accompanied individuals to engage in reflective practice without doing so oneself carries a risk of inconsistency as there can be a disconnect between what people think and what they do, and in the end this is reflected in their professional acts. Thus it is important to model the process, i.e., provide a concrete example of it. Second, modeling is a way of accompanying people while they engage in reflective practice, take action, and then analyze the action. It is also a means of helping each individual develop his or her own model of practice in accordance with his or her progression, thoughts, and actions, which are different from those of the accompaniment provider, and at the same time questioning practices in the light of the prescribed change.

## QUESTIONS FOR REFLECTION Associated with Competency 2

*"Model reflective practice when accompanying change"*

**At the beginning or during the process**

- What is meant by "having a model of professional practice?"
- What is meant by "building a reflective practice model?"
- What is meant by "modeling one's reflective practice?"
- What is meant by "accompanying reflective practice?"

**During or at the end of the process**

- Why is reflective practice necessary for implementing a change?
- How does modeling reflective practice encourage accompanied persons to engage in this process?
- How does engaging in reflective practice foster the development of professional competencies for accompaniment?
- How do we spur people to engage in reflective practice when confronted by a major, prescribed change?
- How can we ensure that we, as well as others, engage in reflective practice?
- What are the benefits of building one's reflective-practice model and being able to account for it to colleagues? To the people we accompany?

COMPETENCY 3

# Take the Affective Domain into Consideration When Accompanying Change

COMPETENCY **3**

## TAKE THE AFFECTIVE DOMAIN INTO CONSIDERATION WHEN ACCOMPANYING CHANGE

### PROFESSIONAL ACTS

1. Act while taking the affective domain into consideration from a cognitive perspective
2. Understand the affective domain in accompaniment situations
3. Recognize affective reactions over the course of the process
4. Understand the role of the affective domain and help others understand it
5. Implement strategies for understanding the role of the affective domain in accompaniment situations
6. Commit to a reflective practice related to the affective dimension of accompaniment

**ACTIONS**

### As an Accompaniment Provider

- Anticipate affective reactions
- Make choices to help the process succeed
- Recognize the causes of affective reactions
- Show openness and empathy toward affective reactions
- Plan affective domain feedback strategies
- Develop one's model of practice while bearing in mind the influence of the affective domain on the development of individuals and groups

### When Accompanying Others

- Understand affective reactions associated with the change process
- React to what happens in the accompaniment situation
- Embrace and understand affective reactions
- Act according to affective reactions
- Use the affective domain as a lever to accompany the change
- Recognize manifestations of affective reactions
- Pinpoint the causes of these reactions
- Anticipate solutions and means to regulate these manifestations
- Use language appropriate to manifestations of the affective domain
- Interpret reactions by drawing on one's professional knowledge

## COMPETENCY 3: CONCEPTUAL BACKGROUND

Taking the affective domain into consideration when accompanying change is necessary to understanding the affective reactions arising from change situations, especially if the change situation leads to cognitive dissonance and potentially fundamental reexamination. In change implementation where the accompaniment is professional in nature, consideration of the affective domain is approached from a cognitive perspective. This means understanding what is happening, not letting oneself be distracted by the affective reactions that emerge, and stepping back to react through informed choices that lend a certain continuity and coherence to the entire process. This perspective presupposes knowing one's own reactions to intense emotional situations and being able to predict affective reactions when preparing to intervene as well as possible adjustments along the way.

Understanding affective reactions involves both the cognitive and the affective domains. It is a skill that, allied with theory, is honed in the field. Understanding affective reactions over the course of the process and recognizing manifestations (from oneself and others) fosters better understanding of resistance from accompanied individuals and, consequently, better regulation of one's own actions (Lafortune and Lepage, 2007). A reflective practice tied to the affective domain of accompaniment spurs involvement from both accompaniment providers and accompanied individuals in a change process.

In an accompaniment process, accompaniment providers play various roles in promoting implementation of the change. They are called upon to act, observe their actions, adjust their interventions, provide an example in action, raise awareness of what they are doing, and show ways to transpose this modeling in the actions of the accompanied individuals. These roles influence accompaniment actions. Analysis of interventions carried out as part of an accompaniment plan (Lafortune, 2004b) reveals three levels (for further explanation, see Lafortune, St-Pierre, and Martin, 2005) of taking the affective domain into consideration: (1) the affective presence, (2) affective modeling, and (3) affective instrumentation:

1. *Affective presence:* Accounting for the affective domain among trained accompaniment providers and accompanied individuals. This first level refers to interventions carried out as part of the accompaniment process that ensure that the affective domain of these people's experiences is directly taken into consideration, e.g., adjust one's actions when resistance or pleasure is observed.

2. *Affective modeling:* Showing that the affective domain is being taken into consideration in interventions with accompanied individuals. This second level refers to taking a step back from the action so that accompanied individuals realize that the affective domain is being taken into consideration and can better take it into account in the accompaniment in their workplace, e.g., show that changes are being made to the action according to ongoing interaction observed among group members. This basically involves explaining actions by putting them into words to help accompanied individuals understand and become aware of them.
3. *Affective instrumentation:* Providing ideas on ways to take the affective domain into consideration in subsequent actions. This third level refers to intervention ideas provided in the action by drawing parallels with the ongoing accompaniment process, e.g., provide the means to adjust one's actions when resistance or openness is observed. This basically involves providing the means to take the affective domain into consideration by ensuring that these are sensible and related to what has happened or is happening.

These three levels demonstrate the difficulty of accompanying people who have to implement a change that involves content (e.g., a competency-defined program) and also inspires feelings of both fear and pleasure, which can lead to withdrawal, curiosity, or engagement.

Some precise means can help accompany reflection with regard to consideration of the affective domain from a cognitive perspective. Here are examples of moments of reflection or platforms for discussion that can be used to interact with accompanied individuals:

- Ask them to describe a situation where change accompaniment has engendered or could engender a show of emotion. They should detail the emotions in question, provide observed manifestations, and list the possible causes for this show of emotion.
- Ask them to explain what aspect of a change accompaniment process could lead to pleasant or unpleasant affective reactions. Ponder questions like the following: How might an unpleasant affective reaction spur accompaniment? How might a pleasant affective reaction hinder accompaniment?

- In the case of an intervention where similar past experiences give reason to believe that the road ahead will be very difficult, ask what affective reactions might emerge. Ask for three categories considered to be effective or ineffective ways of taking the affective domain into consideration in such a situation.
- Following an intervention considered to have been a failure, what affective reactions came out of it? Ask for three categories considered to be effective or ineffective ways of taking the affective domain into consideration in such a situation.
- Questions like the following can be worked into a questionnaire introduced by a description of the intervention: What affective reactions are at issue (recognition)? What aspects drew out these affective reactions (causes)? How were these affective reactions anticipated (prediction)? Why did these affective reactions emerge (causes)? How did these affective reactions influence the intervention (effects)? How were affective reactions taken into consideration (solutions)?

These suggestions are part of a cognitive perspective of taking the affective domain into consideration. This vision underlies this frame of reference and the competency.

To take the affective domain into consideration in a cognitive perspective, we need to know what constitutes the affective domain and its components: attitudes, emotions, self-concept, engagement, beliefs, and attributional beliefs of control. These components are explained and adapted to change accompaniment.

**Taking the affective domain into consideration from a cognitive perspective**

Taking the affective domain into account from a cognitive perspective involves exposing and describing the situation, recognizing the affective dimensions at issue, and being able to list the causes and consequences of actions underway or already completed. Recognizing affective reactions makes it possible to take these reactions into account as they emerge, and to draw on the experience to adapt solutions to other contexts on the basis of one's own affective reactions, those of others, and those that emerge from the interaction. Taking the affective domain into account from a cognitive perspective requires an understanding of the overall situation that enables one to take the critical distance necessary to act appropriately to foster a change.

## *Attitudes*

The notion of attitude refers to a predisposition to act positively or negatively; it often stems from the learner or teacher's previous experiences, which in this context may be related to work experiences in both a professional and a private setting. This conception of attitude matches Legendre's (2005, p. 138) whereby an attitude is a "state of mind (a sensation, perception, idea, conviction, feelings, etc.), [an] inner disposition an individual acquires with regard to him or herself or all elements of one's environment (people, objects, situations, events, ideologies, modes of expression, etc.) that leads to a favorable or unfavorable manner of being or acting [translation]." For instance, some attitudes concern our perception of the nature or value of implementing a change. These attitudes may correspond to a predisposition of attraction or repulsion, or belief in the value or pointlessness of the change.

## *Emotions*

For Legendre (2005, p. 555), an emotion is "an intense affective reaction [translation]." Citing Davidson and Ekman (1994) and Frijda (1986), Niedenthal, Dalle, and Rohmann (2002, p. 146) define emotion as a "brief and acute reaction provoked by a particular known stimulus and characterized by a coherent ensemble of cognitive and physiological responses [translation]." They note that "although theorists do not agree on the number of basic emotions, five [stand out]: sadness, anger, joy, disgust, and fear" (p. 148 [translation]).

When implementing a change, various emotions can surface. For example, anxiety can manifest itself to three different degrees: (1) worry, (2) unease, and (3) fear. (1) Worry shows concern at the intended change to practices; questions one has can have a limiting effect on one's commitment to action. It can be said that a rather negative inner predisposition (attitude) betrays a certain apprehension. This worry is due to somewhat negative past experiences or beliefs and prejudices regarding the change and the value accorded to it. (2) Unease emerges as the change is implemented. It shows itself through sometimes difficult-to-bear tensions, which can lead to a lack of engagement and a desire to avoid certain modifications. Unease can occur when discussing or elaborating on experiences to be realized and may recall difficult moments from the

past. (3) Fear, meanwhile, is of greater intensity and leads to avoidance; it creates unbearable tensions. When the fear of change is intense, it is difficult to overcome or accompany it to bring about collaboration.[1]

Emotions may be rather pleasant and stem from the pleasure that comes with change. This pleasure refers to the satisfaction and contentment that may be gained—in education, for instance—by developing learning-evaluation situations, analyzing an experience, discussing pedagogy, etc. This pleasure may translate into a sense of well-being felt over the course of a collective experience. For example, this pleasure may lead to spontaneously expressing one's appreciation of collaborative work, the results of teamwork, or the support given by colleagues as part of a collective effort (Lafortune, Mongeau, Daniel, and Pallascio, 2000).

## *Concept of the Self*

Legendre (2005, p. 266) defines the concept of the self as "all the perceptions and beliefs a person has about him or herself, as well as the attitudes that arise from them [translation]." The concept of the self corresponds to the representation an individual has of himself or herself with regard to his or her capacity to perform a task. It is a notion related to self-esteem, and some authors consider the two expressions to refer to one and the same thing.

Legendre (2005, p. 617) makes a distinction between them: He defines self-esteem as "the overall worth an individual accords himself or herself [translation]." According to Ruel (1987), the concept of the self is constructed through daily experiences and the comparisons one draws between oneself and others. Experiences are perceived in a certain way, deemed successes or failures, examined from the viewpoint of the characteristics one attributes to oneself, influenced by the perceptions of others (or rather the idea one has of the perception of others), and compared with how one perceives the experiences of others. The result is a kind of synthesis, an image of oneself in a given field of experience, according to how positive a judgment one makes of this image (Ruel, 1987). The concept of the self is shown in the confidence a person has

1. This reflection on emotions comes largely from Lafortune (1992a, b), who studied anxiety through the lens of mathematics according to three degrees: worry, unease, and fear. These three degrees were transposed into teamwork by colleagues according to the observations and findings of Lafortune (2004a; see Lafortune, 2007b, c). Here, they have been adapted to the affective reactions with regard to change implementation.

in his or her ability to accomplish a task (see Lafortune and St-Pierre, 1996). When implementing a complex change such as the shift from knowledge transmission to competency development, the concept of the self refers to the image one has of oneself with regard to one's ability to change and how one understands the change. A certain feeling of competence is exuded along with a somewhat positive perception of being able to meet the demands of this complex situation.

## *Attributional Beliefs of Control*

In education, attributional beliefs of control studies show that successful students are more likely to put their success down to their own actions and personal characteristics (Bouffard and Bordeleau, 1997). This notion of control over one's learning is implicit in various theoretical models and monikers (Bouffard and Bordeleau, 1997): feelings of self-efficacy (Bandura, 1977), learned helplessness (Abramson, Seligman, and Teasdale, 1978), controllability of attributional beliefs (Harter, 1982), competency perception (Harter, 1982), and control beliefs (Skinner, Chapman, and Baltes, 1988). Transposing the concept of attributional beliefs of control to the implementation of a prescribed change may seem more difficult, especially if one believes one has no control over the aspects of the change to be applied. In his work, Weiner (1979) favors situations in which causal attributions are controllable and internal, which is not the case with all accompanied individuals when implementing a change. It can be said that accompaniment providers should identify problems based on what the accompanied individuals can change (control of internal causes) and not what is in management's hands at an establishment, business, or ministry (external causes). This makes it possible to identify workable solutions, while keeping in mind that action initiation requires a favorable context together with favorable conditions and resources.

## *Engagement*

Engagement refers to interest in individual or group actions to undertake. Depending on the level of interest in the change being implemented, commitment can range from "rather low" to "very high." If commitment is high, barriers to change rapidly disappear and solutions are readily identified. If it is low, barriers easily lead to withdrawal, discouragement, and weaker commitment to finding a solution (Lafortune, Mongeau, Daniel and Pallascio, 2000).

### *Beliefs*

Belief in teaching and learning is, for example, a statement or opinion that is held to be true, likely, or possible. A belief may be a conception or a conviction. If it is a conception, it refers more to the cognitive domain. A statement of this nature regarding change could be that "the change called for is unrealistic." If a belief is a conviction, it refers to the affective domain. A statement of this nature could be "I can't commit to a change I consider to be unrealistic." It is not always easy to say if a belief is a conception or a conviction. Many beliefs refer to both (cognitive and affective) components (Lafortune and Fennema, 2003). A belief may be prejudiced, thereby affecting the perception of the change and the attitudes adopted to implement it.

Acting from an affective and cognitive perspective is in itself a professional act.[2] This expertise is developed in the field. Understanding affective reactions over the course of the process and recognizing manifestations—both one's own and those of others—helps us to better understand the resistance of accompanied individuals and to adjust our behavior accordingly. A reflective practice linked to the affective domain of accompaniment fosters engagement from both accompaniment providers and accompanied individuals in a development process for accompaniment competencies.

## UNDERSTANDING PROFESSIONAL ACTS ASSOCIATED WITH COMPETENCY 3

Taking the affective domain into consideration when accompanying change presupposes a number of professional acts and actions. The following are the main professional acts and a certain number of actions that provide a clearer understanding of this competency:

- Act while taking the affective domain into consideration from a cognitive perspective
- Understand one's own affective reactions in accompaniment situations
- Recognize affective reactions as they occur

2. The idea of acting from an affective and cognitive perspective when accompanying a prescribed change is inspired by Saarni (1999), who touches on the concept of emotional competence, and Pons, Doudin, Harris, and de Rosnay (2002), who deal with metaemotion.

- Understand the role of the affective domain and help others understand it
- Implement strategies for understanding the role of the affective domain in accompaniment situations
- Commit to a reflective practice linked to the affective dimension of accompaniment

## Act While Taking the Affective Domain into Consideration from a Cognitive Perspective

When accompanying change, the affective domain should be considered from a cognitive perspective in order to understand the affective reactions to emerge in the change situation, especially if the change is unsettling and leads to profound questioning. Acting from an affective and cognitive perspective means understanding and reacting to what happens as it occurs, without being overwhelmed by affective reactions. It entails keeping a certain distance in order to react by making informed choices that lend continuity and coherence to the entire process. This helps avoid reactions that lead to radical change without there being time to measure its impact on the overall accompaniment process. This perspective presupposes knowledge of oneself in difficult situations. One can prepare for such a situation by predicting affective and emotive reactions when preparing an interview, for example, and by foreseeing possible adjustments to be made on the fly.

## Understand One's Own Affective Reactions in Accompaniment Situations

Accompanying a change, particularly a prescribed one, requires knowledge of one's own affective reactions, especially whenever somewhat intense affective reactions surface. Knowing one's own affective reactions refers to an ability to recognize one's affective reactions in accompaniment situations and to relate them to the events that cause them. In accompaniment situations, accompaniment providers should be aware of their own ongoing affective reactions. Taking this into consideration enables them to make decisions that help the process move forward and lets them adjust to take into account their own affective reactions or those of the accompanied individuals. It also aids in identifying ways to cope with reactions rather than deny them or act as though there had been no affective reactions.

Such knowledge helps accompaniment providers embrace affective experiences and improves feelings of competency, thus enabling them to better support accompanied individuals. For example, accepting that changing professional practices can engender emotions like anxiety or pleasure helps boost feelings of competency to help them deal with the questioning that is essential to moving ahead with the change.

Knowledge of one's affective reactions can show itself in two different ways. In one case, the subject acknowledges his or her reactions without being able to define their nature or say what caused them. In the other, the subject analyzes the affective reactions that arise. Such analysis can lead to much greater awareness as the individual ties the reaction to what might have caused it. In addition to making the situation appear less dramatic and ensuring that it does not worsen, analysis enables appropriate adjustments to be made. It takes place on a second level. The first level is characterized by the fact that the subject acknowledges that he or she may have affective reactions, but is unable to determine their nature. On a second level, the individual analyzes the affective reactions that emerge. Such analysis can lead to true awareness that develops and establishes ties between internal resources, which can then be reinvested in other situations.

## Recognize Affective Reactions

To accompany a change, change providers must be familiar not only with their own affective reactions, but also the people they are interacting with. This knowledge helps to predict the reactions of individuals and the group, depending on the type of intervention. Practice shows the importance of knowing one's own emotions. This knowledge is not the same as knowing others, however, since knowledge of others is more a matter of interpreting affective reactions of varying intensity, an action that may be skewed somewhat or biased by other factors. It requires stepping back to recognize reactions and what they conceal and reacting appropriately. Stepping back in various situations, talking things over with colleagues, and embracing affective reactions help us understand what is going on and make informed choices. Some people show intense affective reactions by expressing where they stand on the change. This will sometimes create feelings of uneasiness within the group, since some people have trouble dealing with situations that might lead to conflict. However, despite their intense reactions, those who speak out are not necessarily opposed to the change, or at least no more so than others who do not openly express their emotions or resistance. Those who

remain silent could give the impression that they support the change, when in fact they are only covering up their emotions or resistance. Such a reaction can be just as unproductive as an affirmative reaction. Those accompanying a group must decode what lies behind the reactions and validate their intuitions by finding out what the accompanied individuals think about the change or how they understand it, not just how they openly express it. By expressing their thoughts, the accompanied individuals have confirmed that they feel personally affected. If they are met on their own terms, they feel a sense of openness and as though they are being listened to. Expressing their point of view forces them to take a position and encourages them to become more involved in the process.

Recognizing affective reactions over the course of the process requires an ability to name the parts of the affective domain at issue, describe the signs observed, and clarify the causes and effects of these affective reactions to reveal the needed solutions. Better understanding these signs helps individuals and the group to move forward. The goal is to maintain a work climate of trust and respect in order to stop people from dropping out or drifting away. Countering the snowball effect of negative reactions and instead focusing attention on reactions that move the change process forward are ways to help show the benefits of change in a positive light.

## Understand the Role of the Affective Domain and Help Others Understand It

Understanding the role of the affective domain in the accompaniment process requires an understanding that the affective reactions of others complement the understanding one has of one's own affective reactions. Knowing about the affective reactions of others helps one understand one's own affective reactions. This shows the importance of giving thought to the affective reaction construction process in order to accept the limits not only of one's own construction of affective reactions, but that of others. This point is particularly important in the case of a prescribed change as some people will (rightly or wrongly) maintain that past actions were very worthwhile. They will want to stick with the status quo and claim that change is not necessary. They will resist the requested change "somewhat passively." Recognizing that affective reactions can emerge in others in the context of change fosters and maintains communication, which reduces the negative influence of resistance that translates the fear of the unknown, a feeling of incompetence, the desire not

to change one's practices, etc. Recognizing and understanding the affective reactions of others helps accompanied individuals feel less isolated. By keeping the channels of communication open with those who are resisting the change, accompaniment providers encourage them to reexamine the causes of their resistance. Once people recognize the reasons or causes behind their resistance, they are more open to the change. This openness does not mean they will agree to the change right away, but they will at least agree to discuss it with others. However, greater awareness of one's own affective reactions is vital to ensuring that comparisons with others' affective reactions are relevant and not demeaning. The reactions of accompanied individuals should not impede their development or hinder communication, let alone slow the progress of the accompaniment process.

Understanding the role of the affective domain in the accompaniment process requires recognition and interpretation of the causes that have engendered the affective reactions and their consequences. This interpretative work can shed light on how individuals—or the groups they belong to—function. The goal is to develop attitudes with regard to the affective reactions of others so as to show empathy in one's relations with others. Empathy from accompaniment providers toward accompanied individuals requires recognizing others' affective reactions (not necessarily through verbalization) in order to foster explanation or comprehension—through questioning, for example. This spurs communication and comprehension of affective reactions without hasty conclusions on the part of accompaniment providers. Such empathy can help create a respectful, attentive, and open environment.

An individual's internal affective state does not necessarily correspond to what the individual outwardly expresses. Empathy allows one to understand or at least be aware of the disconnect that may exist between what is said and what is felt. Individuals do not therefore always clearly or outwardly express what they are thinking or feeling. They act in this way because they cannot anticipate how others will react. They may believe that what they are thinking may be detrimental to themselves or to others. They may also be afraid of hurting others or believing that what they think will have no effect on the change process, etc. Understanding this phenomenon or the issues at hand is a boon to interpersonal relationships.

In an accompaniment situation, there is an advantage to be gained by drawing attention to the difference between what people say and feel, since they tend to be different. For example, in education, this may be

seen in the beliefs and practices surrounding teaching, learning, and evaluation. This disconnect between thoughts and actions is not dramatic if the individual is aware of it, although it may sometimes hinder discussion and create barriers. In this sense, the ability to understand the difference between the expressed affective state and that which is felt leads to greater awareness through coherent, relevant means.

The nature of relations and communication is often influenced by affective reactions and, in particular, by the degree of reciprocity and balance in the relationship. People do not always communicate their reactions, and they do not all do so in the same way. These differences have an effect on their relationships with others as they facilitate or hinder communication, which is why understanding the affective factors at hand and adjusting one's intervention accordingly helps draw accompaniment providers closer to those they accompany and allows them to support and help them through the process. If the accompaniment process is based on mutual trust, the affective domain can be an important lever to help bring about change.

In the accompaniment process, such awareness is an encouragement to listen to accompanied individuals and develop means to observe the influence of affective reactions in interactions. Admittedly, awareness requires a view of accompaniment that is multiple in perspective: observing what happens, determining the affective reactions at issue, noting the influence of these reactions in interaction, explaining their emergence, and looking for the means to accompany these reactions—all with an aim to taking action. Such a process presupposes multiple adjustments and helps stay the accompaniment course.

## Implement Strategies for Understanding the Role of the Affective Domain in Accompaniment Situations

Knowing and implementing strategies requires predicting and planning of interventions, as well as knowledge of which affective reactions may surface and what feedback should be provided when they do. It also requires monitoring processes (evaluating what happens) and regulation processes (making adjustments over the course of the action) for one's own affective reactions and those of others in this type of context. More particularly, self-regulation strategies provide the capability to react to affective reactions—especially aversion, anxiety, refusal, and distress—and cope with intense affective reactions in the long term. Exercising this capability presupposes developing self-regulation strategies that

encourage adjustments to be made while affective reactions are being experienced. The capacity to self-observe during affective experiences could be considered necessary to understanding what is happening. This lets one see what happens over the course of the action and act according to what is observed (Lafortune and Martin, 2004). It therefore becomes possible to stress the positive aspects of supposedly negative affective reactions like anxiety (Lafortune and Pons, 2004). During the accompaniment process, instead of denying the presence of affective reactions (from oneself or others), it is better to look at their positive effects or work together to look for ways to adjust one's intervention in order to agree on a change process while showing one's own commitment to the process. To have better strategies for whenever affective reactions surface, it is important to try to understand the components of the affective domain at hand. It is also important to set out the causes and effects of this affective manifestation, and to formulate possible solutions to accompany the affective domain in a change process and foster engagement. Recognizing this domain encourages accompanied individuals to commit to the accompaniment process; it often counters their resistance and helps remove affective barriers that can hinder the development of individuals and the group.

## Commit to a Reflective Practice Linked to the Affective Dimension of Accompaniment

Committing oneself to a reflective practice linked to the affective domain of change accompaniment presupposes the ability to use the vocabulary of words, images, symbols, etc. associated with affective reactions to convey one's affective experience to others and to access representations of one's own affective experiences, which helps put them in context and compare them to the representations of others. This vocabulary is useful in describing experiences involving (pleasant or unpleasant) affective reactions in an accompaniment process. It also spurs discussion and sharing of affective reactions. Restricting oneself to naming the emotions felt, for example, or trivializing them by reducing them to anecdotes does not help in the quest to explain and better understand them. To express affective reactions using appropriate vocabulary, it is essential to collectively explore means for reacting to them in the course of action. In any accompaniment process, these means are directly tied to the affective reactions experienced (What affective reactions have been experienced

during such or such an intervention?) or deduced from a conceptual treatment of affective reactions (What affective reactions could emerge in this type of situation?).

In an intervention in which the affective domain is at issue, in order to understand how one's own reactions and those of others work it is in the accompaniment provider's best interests to have theoretical knowledge, practical experience, and a sufficiently rich knowledge culture. This knowledge culture provides him or her with the tools, concepts, and models required to interpret and explain.

Engaging in a reflective practice involves analyzing one's own affective reactions and those of others in situations where affective reactions are at issue and developing one's own model of practice. This aspect of the competency is vital. It enables the accompaniment provider to answer questions such as, Is there a difference between what is expressed and what I think is felt? Are there any hidden or concealed emotions? Am I misinterpreting the affective reactions expressed? To what extent is the emotion expressed related to the situation? What affective reactions disturb me most? Could I intervene differently? How could I be more effective in a similar situation in the future?

Lastly, in a change process, accompaniment providers are often confronted with the effects of the affective domain. They have to deal with their own reactions and those of the accompanied individuals. These situations are often unsettling, but they cannot be disregarded as they always end up having an influence—whether positive or negative—on individual progress in the accompaniment process. In this sense, developing the "Take the affective domain into consideration when accompanying change" professional competency is essential, especially in cases of prescribed, directed, and planned change.

## QUESTIONS FOR REFLECTION Associated with Competency 3

*"Take the affective domain into consideration when accompanying change"*

**At the beginning or during the process**

- What does taking the affective domain into consideration from a cognitive perspective mean?
- How does one understand one's own affective reactions in a change accompaniment situation?
- What influence can an affective reaction have in an accompaniment situation for a prescribed change?
- What does engaging in a reflective practice linked to the affective domain of accompanying a change mean?

**During or at the end of the process**

- How can one take the affective domain into consideration from a cognitive perspective?
- How can understanding one's own affective reactions and those of others foster professional accompaniment?
- What affective reactions can most undermine an individual's engagement when implementing a prescribed change? Explain your answer.
- How can a reflective practice linked to the affective domain of accompaniment foster commitment to implementing a change?
- How can knowledge culture improve understanding of the influence of the affective domain when accompanying a change?

COMPETENCY 4

# Maintain Reflective-Interactive Communication in Preparing for and Facilitating the Change Process

COMPETENCY 4

## MAINTAIN REFLECTIVE-INTERACTIVE COMMUNICATION IN PREPARING FOR AND FACILITATING THE CHANGE PROCESS

### PROFESSIONAL ACTS

1. Explain the direction, foundations, challenges, and impact of the change
2. Show continued interest in staff involved in the change process
3. Use reflective-interactive techniques as per a socioconstructivist communication perspective
4. Communicate clearly using the terminology associated with the change

**ACTIONS**

### As an Accompaniment Provider

- Express your ideas, intentions, and understanding of the change
- Share your understanding and vision of the change
- Integrate the appropriate terminology into your message and actions
- Be open to other people's ideas, representations, and vision of the change
- Be an active listener and show respect and mutual trust
- Properly interpret the messages and needs expressed by the workplace community
- Follow up on discussions and idea sharing
- Collaborate and consult with others to prepare and facilitate accompaniment tasks or situations

### When Accompanying Others

- Suggest content, processes, techniques, and tools to facilitate understanding of the change, encourage people to update practices, and enrich the knowledge culture
- Discuss the direction, foundations, challenges, and impact of the change
- Develop definitions or grasp the meaning of the terms and concepts associated with the change
- Help people to integrate these words and concepts when discussing their practices
- Promote the development of a shared vision of the change
- Work to develop professional expertise in the workplace with regard to the change
- Question, give feedback, synthesize, reflect, and encourage moments of reflection to engender ideas and promote dialogue and communication

## COMPETENCY 4: CONCEPTUAL BACKGROUND

Which professional acts require proficiency in reflective-interactive communication? Why is reflective-interactive communication so important in the change accompaniment process? Like change, communication is a highly complex phenomenon that is influenced by a range of variables (Raynal and Rieunier, 1997).

Dialogue "is not sequential ..., but based on ongoing and simultaneous interactions that borrow from differentiated channels: attitudes, posture, voice, tone, gestures, mimicry..." (Raynal and Rieunier, 1997, p. 332 [translation]). One's manner and verbal and nonverbal messages are all part of communication. On the one hand, there is a message to convey, a prescribed change, and on the other, a way to proceed so as to promote the updating of practices and the development of professional competencies for change accompaniment. Communicating to promote a change requires not only a thorough understanding of the content, but also of the way to communicate it.

Accompaniment providers take context into consideration as they seek to engage the people they accompany. The latter are in no way passive listeners, but become actively involved as part of a reflective-interactive exchange. The accompaniment provider is not, however, the sole information source about the upcoming change. The people being accompanied may also have access to various other sources of information or have participated in training sessions that involved the change in some way. However, these sources should be checked and information provided on a prioritized basis, to avoid information overload, patchy or contradictory information, or disinformation. The accompaniment process is characterized by much back-and-forthing between the various sources of information that nurture the process of change. These sources can be of value, but not always. Reflective-interactive communication is not a one-way street, since the input of each and every group member helps advance the understanding of all involved in the process. According to Morin (cited in Champy and Étévé, 2005), communication is carried out through interaction between individuals and within a group. Interaction is a fundamental aspect of communication.

An inaccurate reading of the situation can lead the process astray. That is why it is important to ensure mutual comprehension by clearly expressing the message to be communicated. Reflection and interaction make it possible to adjust one's actions and proceed with the change in a communication context conducive to said change.

**Reflective-interactive communication**

Reflective-interactive communication is part of an accompaniment process for directed change with prescriptive elements. Accompaniment providers bridge the gap between the content associated with the change and the relationship the persons being accompanied have with this content and the desired change. They accompany groups with a view to explaining the change and nurturing reflection about the change itself and its effects on professional practice. Group accompaniment involves interaction and introspection. In reflective-interactive communication, the intention is clearly stated; it is to propose a change to individuals, who interpret or decode the message to decide whether or not to accept the change and whether or not to integrate it into their practices and provide feedback on it. Feedback makes it possible to determine whether the intention has been correctly interpreted, and can also lead to other intentions, depending on the individual's reading of it. Depending on the individual's receptiveness and past experience, comprehension of the message can vary significantly. In reflective-interactive communication, it is vital to take previous knowledge and interpretations into account. However, this requires making time for listening, observation, self-questioning, and discussion; using appropriate vocabulary; establishing critical distance; and choosing means that reflect a socioconstructivist perspective.

## UNDERSTANDING PROFESSIONAL ACTS ASSOCIATED WITH COMPETENCY 4

Maintaining reflective-interactive communication in preparing for and facilitating the change process calls for professional acts and actions. The following are the main professional acts and certain actions that help better circumscribe this competency:

- Explain the direction, foundations, challenges, and impact of the change
- Show continued interest in staff involved in the change process
- Use reflective-interactive techniques as per a socioconstructivist communication perspective
- Communicate clearly using the terminology associated with the change

## Explain the Direction, Foundations, Challenges, and Impact of the Change

In the accompaniment process, accompaniment providers explain the direction, foundations, challenges, and impact of the change to those around them. In addition to passing on information that helps "get the message across" about the change, they also take into account the context in which it is being introduced, in order to create the conditions conducive to its acceptance. These conditions do not apply solely to the clarity of the message and the quality or quantity of information available; they also apply to the effects of the message on its intended recipients. "These effects that modify the receptiveness of the recipient can be cognitive (knowledge), affective (mental state), or conative, that is, that stimulate motivation and a propensity to take action" (Champy and Étévé, 2005, p. 195 [translation]). Major changes cannot be forced upon others or imposed haphazardly. This is why change accompaniment proposes content, processes, techniques, and tools to facilitate an understanding of the change, encourage individuals to update their practices, and help enrich the knowledge culture.

People in the midst of change place considerable importance on the workplace community they belong to. When the change creates a sense of insecurity, these ties grow stronger. This recognition stems from their collective experience, and from the influence certain individuals can exert. The change offers an opportunity to work together to develop professional expertise. To understand the change, people discuss its orientations and foundations. These discussions help develop a shared vision. Because they are not isolated, people are in a better position to consider what is at stake and the impact of the change by comparing it to current practices in their workplace. To do this, they rely on their knowledge of the workplace, which reacts to the change, especially in cases of major change.

In the area of education, for example, like Coudray (1973), who talks about pedagogical communication, it can be said that various factors enter into play in communication situations, among them, the social, cultural, and pedagogical values of the education workplace being accompanied; relations between the accompaniment providers and those being accompanied; models of practice and conceptions of teaching, learning, and evaluation; and receptiveness to the change in question.

Having a keener understanding of the direction, foundations, challenges, and impact of the change makes it easier for accompaniment providers, who can exercise their leadership by drawing on their ability

to influence the persons they are accompanying with regard to the change. To help others take ownership of the change, accompaniment providers express their ideas and share their understanding and vision of the change. In accompanying others in this process, they themselves take ownership of the change. While this does not prevent them from taking a critical stance, the fact remains that the communication is not entirely impartial. The message is conveyed from a perspective of updating practices and working towards the change. Accompaniment leadership requires reflective practice and modeling.

## Show Continued Interest in Staff Involved in the Change Process

There are various ways to show continued interest during the change accompaniment process.

### *Be Open to Other People's Ideas, Representations, and Vision of the Change*

Being open to other people's ideas, representations, and vision of the change leads those being accompanied to talk about how they see the change in their workplace. This enables accompaniment providers to draw on previous knowledge of the workplace community to plan sequences of activities, tasks, or accompaniment situations in conjunction with those they are accompanying. Being open to other people's ideas and representations also suggests being open to one's colleagues so as to gain a clearer picture of their conceptions. This helps accompaniment providers evaluate the strengths and challenges of the group and situate these in relation to the change. Doing so fosters engagement among those who are quicker to grasp the implications of the change.

### *Be an Active Listener and Observer*

Active listening and observing are strategies that help create a climate conducive to the development of knowledge about the change and pave the way to effective communication. People feel that what they have to say is being listened to and judged on its merits. This mutual climate of trust that is gradually built is key to being able to create and take advantage of sociocognitive conflict in accompaniment situations.

At the beginning of the accompaniment process, it is not easy to create cognitive conflict that seriously challenges conceptions and calls into question current practices. A mutual climate of trust must be created before people will open up and express their beliefs (conceptions and convictions) when they know they may not be entirely consistent with the foundations of the proposed change. This climate of trust hinges in large part on the accompaniment provider's awareness that the individuals being accompanied are sensitive to what is being said and to the value judgments that may be made. Avoiding such judgments while keeping in mind that not all practices are necessarily consistent with the foundations of the change is an art that accompaniment providers develop over the course of their work, one they must consciously aim for. They must observe how people—and their practices—evolve during the change process. Some adjustments will be made quickly. Others may take months or even years. After all, it is unrealistic to expect every practice to fall immediately in line with the change the moment it is "decreed." Not everyone progresses at the same pace, and some people or groups may be more closely aligned with the practices associated with the desired change. These people are therefore necessarily a step ahead in the change process. An active listening and observation posture leads to reflective-interactive communication and multiple interactions that enrich those involved in the process of change. Comparisons help situate the conceptions and practices associated with an area of expertise or workplace, test them against others, and contrast them with those proposed under the prescribed change.

Active listening that welcomes ideas respectfully and without discrimination stimulates reciprocity, enabling accompanied individuals to engage confidently in discussions, which become periods of coconstruction in which everyone involved in the process feels comfortable reexamining not only their ideas, but also their conceptions and practices.

### *Accurately Interpret Comments and Needs*

By accurately interpreting or decoding the comments and needs of the individuals they accompany, accompaniment providers are able to use the situation to support the construction of new knowledge and the development of competencies. In many cases, the persons being accompanied will already have embarked on the process of constructing knowledge or developing competencies and have adjusted their own conceptions. Taking advantage of these moments to raise awareness of one's own constructions and those of others, or of different ways of structuring knowledge, can aid the development of metacognitive skills. When

accompaniment providers put accompanied individuals in situations where they can verbalize their mental processes, they are creating for them conditions conducive to adjusting their conceptions, structuring new knowledge, and developing competencies.

An accurate interpretation of the comments and needs of the accompanied individuals presupposes that the accompaniment provider is capable of "reading" a situation, examining it from a critical distance, and reacting appropriately to it. For example, if the accompaniment provider notes that sociocognitive dissonance is being created among those being accompanied, it is possible to let them experience this period of dissonance while maintaining their sense of safety. This may mean resisting the temptation to gather the ideas into a formal presentation and placing oneself in a position of knowledge transmitter. Instead, this time of "floating" can provide the opportunity to step back and watch what happens, then react based on a better interpretation of the group's reaction as opposed to reacting spontaneously, which is not always appropriate. These times are also a chance for accompanied individuals to regain control over their learning by remaining cognitively active. And even if they do not always seize this control, they must at least have the chance to exercise it.

Spacing out this sociocognitive dissonance helps preserve the comfort zone that the accompaniment process requires. Accompanied individuals come to realize that they are not judged when they question their conceptions, rather these moments of destabilization are part and parcel of the learning and competency development process, and that at some point, they will be able to mentally organize their knowledge better, knowing that other destabilizing moments will arise and certain conceptions will once again be called into question.

Accompaniment providers can make sense of group's interests and needs by drawing on different methods such as synthesis, reformulation or questioning. These strategies support recognition, clarification and increased understanding of the interests and needs that are expressed and their validation in action.

## *Follow Up on Discussions and Idea Sharing*

It is not unusual during the accompaniment process for more than one aspect to be discussed at a single meeting. Some aspects may have been raised at a previous meeting or carried over the course of several meetings. It is important to keep the conceptual thread of the accompaniment process in mind to follow up on discussions and nurture communication to ensure

it remains reflective and interactive. However, as some issues may require further research, reflection, or time to "digest," they may require more than one intervention over the course of the process. People do not necessarily always have all the information they need to understand a specific aspect of the change. Followups provide an opportunity to verify where people stand and make adjustments or offer help as necessary. Aside from triggering reflections that often lay the groundwork for later meetings, accompaniment providers must ensure there are not too many questions left unanswered and address any unresolved issues discussed during the intervention.

## Use Reflective-Interactive Techniques as Per a Socioconstructivist Communication Perspective

Communication in the change accompaniment process calls into play means of collaborating, questioning, reflecting, and interacting.

### *Collaborate and Consult with Others to Prepare and Facilitate Accompaniment Tasks and Situations*

Reflective-interactive communication is maintained throughout the accompaniment process on two levels—in advance with the persons who collaborate and consult together to plan the accompaniment, then during the sessions with the individuals being accompanied. Joining together with one or more other people to plan the process is not only a spur to professional collaboration, but also a good example of socioconstructivist accompaniment, which is characterized by the sharing and pooling of knowledge and expertise of the accompaniment providers with regard to the planned change. Integrated into the activities, tasks, and situations presented, such accompaniment helps avoid a scattergun approach that strays from the conceptual thread. The purpose of preparing ahead is to plan situations of individual and group reflection for accompaniment recipients and give rise to moments where interaction can lead to reexamination of practices and beliefs (conceptions and convictions). It is an opportunity to create sociocognitive conflict, help people make connections, and encourage awareness-raising that leads to action. Cofacilitation calls for sharing responsibility for accompaniment, as well as collaborating, cooperating, and providing mutual aid and support. The advantage of this form of dyadic facilitation is that it encourages sharing of the cultures associated with the respective fields of expertise to the benefit of the individuals being accompanied. In affective terms, it helps facilitators

recognize and comprehend moments of tension and react accordingly. Depending on the type of communication established by the team, it can spur those being accompanied to call on one or more of their colleagues to collaborate professionally with others.

Reflective-interactive facilitation also requires that the accompaniment providers engage in a modeling process whereby they provide examples through action, rather than simply giving examples. Modeling is a process whereby accompaniment providers verbalize their accompaniment process—the questions they ask themselves, the changes they have made, the reasons for making these changes, the doubts raised in the process, and so on. This helps make the accompaniment process more credible since their actions are consistent with the message.

Socioconstructivist accompaniment refers to the support provided to individuals in a learning situation to help them build their knowledge and develop their competencies. This type of accompaniment activates previous knowledge, experience, and competencies and interrelates knowledge and experience to promote transference in various situations (see Lafortune and Deaudelin, 2001). Dyadic reflective-interactive facilitation is an aid to this kind of accompaniment when it

- Draws links between current practices, theory, and the foundations of the change
- Leads to discussions on intentions, ways of implementing them, and possible adjustments and modifications. It is crucial to explain the choices made so that the members of the dyad understand how the adjustments made while in action fit the conceptual thread they have agreed to follow.
- Triggers sociocognitive conflict that is reassuring in affective terms while also turned to the advantage of the entire group
- Takes into account the affective domain, which can both foster and hinder engagement
- Addresses resistance to change by taking into account the manifestations, causes, and consequences of this resistance and seeking solutions
- Facilitates the sharing of knowledge acquired during interventions
- Spurs people to ask questions and question themselves
- Takes advantage of moments of coconstruction that arise during or after the interventions with colleagues, in a climate of mutual respect and professionalism

The objectives of cofacilitation include ensuring continuity, working in synergy; benefiting from a broad knowledge culture enhanced by the past knowledge of two or more persons; offering mutual support (affective domain); encouraging one another; providing an outside perspective to analyze, comment, and critique; sharing tasks; and nurturing discussion to guide selection of content, intervention methods, and strategies.

Cofacilitation is a form of professional collaboration that also serves as a "safety net" for accompaniment providers, affording them an additional element of trust, and even going so far as to prevent professional burnout (see Lafortune, 2004d). It also encourages the sharing of theoretical foundations, which enriches the respective cultures of the partners involved. It injects an element of dynamism into their work by allowing individuals to contribute to the construction, justification, and consolidation of their intervention models, and gain a conscious awareness of their beliefs about teamwork and about accompaniment in general. Cofacilitation is a way for each partner to contribute to the development of professional competencies by exercising accompaniment leadership.

In socioconstructivist accompaniment, dialogue and collaboration are both part of a cofacilitation approach. The partners get to know each other better while preparing and facilitating sessions. The discussions they have on the various issues at hand, in addition to those dealing with session preparation, help them learn more about their partners, understand their actions, and observe how consistent their choices are. This allows the members of the dyad to assess each other's strengths and weaknesses. Depending on their knowledge, experience, skills, and individual and complementary competencies, they can split up the tasks to make the accompaniment team as effective as possible.

### *Question, Give Feedback, Synthesize, Reflect, and Encourage Periods of Reflection to Engender Ideas and Promote Dialogue and Communication*

The use of reflective-interactive techniques such as questioning, feedback, synthesis, moments of reflection, and reflective writing during the accompaniment process encourages reflective-interactive communication. All these techniques, when employed at the opportune time, can, to varying degrees, provide an opportunity for accompaniment providers and recipients alike to experience moments when the contrasting and comparing of ideas leads to new awareness conducive to moving forward with the change.

### Questioning

Questioning can be a way to encourage accompaniment providers to verbalize what they do, how they do it, how they could do it differently, and how they could help promote new awareness or encourage action on the part of those being accompanied. Questioning can also lead the persons being accompanied to take a closer look at the process of reflective-interactive communication and to transpose their experiences into their own accompaniment practice. This is one way of putting into practice the proposed model.

### Feedback

Using feedback in the context of a prescribed change is a challenge for accompaniment providers, since not all experiences and ideas will be pertinent to the planned change. Giving feedback in a change context means keeping the following goals in mind: (1) situating the foundations of the change; 2) ensuring the coherence of all aspects of the feedback; 3) agreeing to take a critical view that is open to new ideas and practices; 4) taking into account the affective domain while also considering the change and the professional relationship in question. Accompaniment providers who act as guides learn to recognize the strengths and challenges of proposed actions and to support individuals as they evolve in their roles and develop their competencies. Feedback can be facilitated with strategies such as the following: (1) identify key words when listening to people present experiments and proposals; (2) build on the words or expressions they use; (3) ask questions in a way that engages the entire group, avoiding asides and two-way dialogue; (4) limit the amount of time people can take to describe their experiences.

### Synthesis

Comparing and contrasting ideas with a view to sharing representations of a single object—i.e., reexamination, not confrontation—requires interaction and coconstruction. This comparing and contrasting of ideas may be seen as an obstacle to synthesis because of the different, even opposing ideas that can emerge. A synthesis based on group interactions may represent the group's ideas or values, but perhaps not the ideas and values of each individual member of the group. The results are not necessarily integrated into the process, but may instead be used for group questioning and for fostering new awareness. Synthesis—the product of comparing and contrasting ideas—is an interpretation by individuals or members of a group that draws on individual and collective reflections. It takes

inspiration from and speaks to a diversity of viewpoints, but not necessarily all viewpoints. Its content is structured, and often organized in an original manner. Individuals carrying out a synthesis select certain ideas, establish connections, and organize information hierarchically in keeping with their understanding and interpretation of the matter at hand. They may decide to eliminate certain ideas that do not fit with the proposal or add new ones to make it clearer. Their models of practice (training and experience) will strongly influence the aspects they deal with in making the synthesis, by serving as a sort of interpretation grid. Their models of practice are among the available resources on which they can construct new knowledge about the change.

### Moments of Reflection

Moments of reflection are periods provided to accompaniment recipients to allow them to activate previous knowledge, experiences, and competencies; integrate learning; and reflect on various issues. They are vital to the development of professional competencies, to build awareness and promote the change integration process. In terms of reflective-interactive communication, moments of reflection require being comfortable with silence, to leave time for reflection. Accepting silence and making space for it helps create moments conducive to reflection and to the emergence of new ideas. Considered responses are often more nuanced, because the underlying ideas have been pondered and assessed before being shared with others. While they may not occur frequently, these moments are appreciated by those being accompanied, who quickly come to recognize their value. Encouraging people to take time to think and actively seek answers fosters reflection and helps them integrate and take ownership of change in a way that strengthens their autonomy. Moments of reflection are necessary, but are made more meaningful if they are explained, and if participants can share their reflections with others.

### Reflective Writing

Communication can also include a process of reflective writing that, according to Morisse (2006) requires overcoming resistance to the message being conveyed and the risk-taking required by committing one's thoughts to paper. It also involves reflecting back on the actions promoted by dialogue among peers and with accompaniment providers or trainers. Self-observation and self-analysis foster the development of reflective competencies that allow people to apprehend and grasp the complexity of the action. In implementing change, reflective writing is a technique that uses writing to reflect on one's professional practices

*a posteriori* and on future practices. It can be viewed as a way to build knowledge and develop competencies, and is also useful for training and self-learning. It puts people in a dynamic situation where they simultaneously build knowledge, learn, and educate themselves while developing their competencies and performing professional acts. Through writing and subsequent acts, they model their practices while putting them into practice. This reflective writing process can take the form of an accompaniment journal.

Over the course of the accompaniment process, it is not unusual to observe the construction of certain conceptions that are not entirely or not at all consistent with the foundations of the desired change. To verify the meaning of these emerging conceptions, it is worth calling them into question and encouraging interaction to bring to light potentially problematic situations that can get people to make the necessary adjustments. Through questioning, feedback, synthesis, moments of reflection, or reflective writing (depending on the context), the individuals being accompanied gradually come to organize their thoughts better, express them to others, make themselves understood, understand other people's ideas, and construct a shared vision of the change.

To provide truly socioconstructivist accompaniment, it is crucial to be flexible in using these various reflective-interactive techniques. But to be flexible, one has to have first developed an ability to question, provide reflective-interactive feedback, synthesize, foster and take advantage of moments of reflection, and promote the practice of reflective and professional writing. Being able to make professional judgments on ethical and critical issues is also valuable in interpreting communication challenges. This helps highlight affective reactions, resistance, pleasures, questioning, and conceptions with regard to the desired change. It also helps people engage, both individually and collectively, in the change process to update their practices and develop professional competencies for accompaniment.

As they develop their metacognitive skills, accompaniment recipients become aware of two concerns—or viewpoints—in accomplishing their task: one with regard to what they are learning and the other on the process used to accomplish the task or action project. When both viewpoints are considered during the process, they allow participants to evaluate and subsequently make regular adjustments. This kind of practice is valuable in the reflective-interactive communication process. For instance, instead of merely concentrating on what is said in a given situation, it is useful to pay attention to the way people interact. This

encourages participants to analyze the communication so they can better adjust the content and organizational structure, and use language adapted to the context. A third viewpoint emerges in the accompaniment process as participants transfer what they learn and the way they learn it into their own professional practices.

## Communicate Clearly Using the Terminology Associated with the Change

A change necessarily entails introducing or revisiting new ideas, new concepts, and new approaches. People react to this situation by engaging in a quest for meaning. They strive to understand and to use the correct terms, expressions, and definitions, namely those that will improve comprehension, allow everyone to be on the same wavelength, and avoid confusion. However, in a constructivist perspective, it is, it would appear, unrealistic to strive for such unanimity since this kind of perspective presupposes that people structure their thoughts based on their past knowledge and experience. By adding a social dimension (socioconstructivist) and promoting interaction, it is possible for people to eventually understand each other's constructions and to modify and adjust their own. It is not a matter of standardizing viewpoints so everyone feels the same way. Rather, by discussing their views and analyzing the meaning of the change with others, people are quicker to accept and use the terminology associated with the change. This dialogue helps promote the building of a shared vision of the change.

From the moment people being accompanied engage in a communication process, they want to express themselves clearly. However, in practice, experience has shown that even when interlocutors believe they are being crystal clear, the message is not always clear to the people it is aimed at. The socioconstructivist perspective considers that people decode what they hear based not only on their past experience and knowledge, but also on their cognitive and affective state at the time they receive the message. It is important to take these variables into consideration to foster engagement in the change process. Moreover, the quality of communication can have a huge impact on the engagement in (or disengagement from) the desired change, especially if it is a prescribed change or has prescriptive elements.

To promote engagement, it is critical to express oneself clearly about the foundations of the change and the ways to implement it. Even if the change, its foundations, the underlying concepts, and the various

professional practices are complex and there are new designations involved, it is possible to make the vocabulary accessible and understandable without taking away its meaning. Having said that, it is important to use the correct words and to clarify them throughout the process to help enrich the knowledge culture of the individuals and the group. Many fields, including those dealing with health, the law, technology, and education, have their own vocabularies to address and describe our changing world.

To take ownership of the change, individuals must first understand, integrate, and define new terms and concepts. These terms translate realities that help distinguish between certain current practices and those that are more consistent with the person's representation of the change. They serve as milestones in individual comprehension. During the accompaniment process, the change is made more concrete and topical by using and clarifying these words and analyzing their meaning. This task is part of the accompaniment process as it prevents certain misinterpretations and the "watering down" of information. Taking ownership of the same words to talk about the same things helps people move toward a shared vision of the change. When people cannot agree on the meaning of words, communication can break down and create resistance that can hinder comprehension and the progress of the change. With reflective-interactive communication, individuals take ownership of the terminology and gradually integrate it into their language and practices. Over the course of the accompaniment process, people find it increasingly easy to use the words and concepts associated with the change, a sign of their engagement in progress toward the change.

To conclude, when implementing a major prescribed change, it is vital to talk about it, strive to comprehend it, and understand its challenges and effects on practices. Achieving comprehension requires developing the competency "Maintain reflective-interactive communication in preparing for and facilitating the change process." Reflective-interactive communication helps avoid hasty judgments and interpretations that can hamper dialogue. It means not only agreeing to compare and challenge ideas, but also to critically examine one's own beliefs and practices as well as those of others.

## QUESTIONS FOR REFLECTION Associated with Competency 4

*"Maintain reflective-interactive communication in preparing for and facilitating the change process"*

**At the beginning or during the process**

- How can maintaining a relationship of trust and respect help promote reflective-interactive communication with accompaniment recipients?
- For those being accompanied, what is meant by "expressing oneself using accessible vocabulary?"
- How does one go about translating the complexity of the change in a comprehensible manner?
- What is meant by "implementing reflective-interactive communication?"
- What is meant by "preparing for and facilitating the change process?"

**During or at the end of the process**

- How does one exercise active and respectful listening?
- How can using the correct terms in referring to theories (socioconstructivism, metacognition, reflective practice, sociocognitive conflict) hinder the engagement of certain people?
- How can a person's interpretation of ideas impair his or her engagement and trigger affective reactions?
- How can the use of reflective-interactive techniques help improve communication?

COMPETENCY 5

# Utilize Professional Collaboration to Move the Change Process Ahead

COMPETENCY 5

## UTILIZE PROFESSIONAL COLLABORATION TO MOVE THE CHANGE PROCESS AHEAD

### PROFESSIONAL ACTS

1. Build partnerships with staff engaged in the change process
2. Engage in the exercise in a spirit of collaboration, cooperation and dialogue
3. Develop professional competencies for accompaniment both individually and collectively
4. Construct a shared vision of the prescribed change
5. Circulate information about resources, actions, and contributions among staff engaged in the change process
6. Develop networks for sharing and communication between staff engaged in the change process

ACTIONS

### As an Accompaniment Provider

- Be familiar with the resources in the workplace
- Be open to various interpretations of the change
- Acknowledge professional expertise in the workplace
- Increase responsibility by involving people in the accompaniment process
- Share leadership, responsibilities, and tasks

### When Accompanying Others

- Work in teams of colleagues
- Share one's perspective of teamwork
- Create conditions that foster collaboration
- Build group ownership with regard to the change
- Share expertise with others
- Compare and contrast one's vision of change with others
- Modify conceptions of the change
- Work to create a shared understanding of the change
- Take stock of professional expertise in the workplace
- Appreciate and disseminate expertise and actions
- Foster networking by promoting the circulation of information and the revisiting of experiences and actions
- Record the process
- Mobilize the professional community
- Identify theoretical aspects of practices in the workplace

## COMPETENCY 5: CONCEPTUAL BACKGROUND

Professional collaboration is very similar to networking. It creates interactions that require collective effort and discussion and that lead to collective decision making and concerted action. The group analyzes and adapts its interventions, thus making everyone responsible for accompanying colleagues. Professional collaboration is a process by which colleagues work together to carry out specific actions.

Professional collaboration can develop and manifest itself in a number of ways. (1) Dyadic accompaniment models cofacilitation in order to illustrate (a) the advantages of complementary expertise, (b) the necessity for continuity in the face of staff turnover, and (c) the dynamics created by leadership-training-accompaniment teams with different customs and makeups. Dyads also foster interaction when meetings are prepared (scheduling and predicting). (2) Working in teams during the meetings is a way to identify and resolve problems, discuss simulation exercises, and draw up summaries. Accompanied individuals may form groups according to their affinities or institutions, but sometimes they are invited to organize themselves differently so they can learn how things are done in other workplaces.

Working in teams of colleagues requires collaboration as well as coconstruction, cotraining and mutual training between team members together with awareness of the affective domain. It thus entails (1) organizing one's efforts to bring about a change, such as developing the competencies of accompanied persons, and (2) collectively monitoring and adjusting the decisions and actions to be taken (Lafortune, 2004d). Working in teams gives team members the benefit of another point of view on their work and professional judgment. However, they must be willing to accept feedback from colleagues and even have their work called into question. This means opening the door somewhat to one's "professional intimacy." Colleagues working together in teams must therefore develop certain qualities, the most important being respect for others, which fosters mutual feelings of trust and safety and makes it easier for team members to participate in debates and experiences that may challenge their ideas. Working in teams is a collective engagement.

Teamwork is often defined as working toward a common goal, vision, or understanding. From a socioconstructivist perspective, it is difficult to achieve this common vision or understanding because people do not necessarily have the same background or expertise as their colleagues. Differences are sometimes difficult to accept, but they can also contribute to the development of others. This is why it is so important

to be open to other points of view. An open attitude allows colleagues to understand why conflicts may develop in certain groups, but above all it allows the team to assert its collective strength. Socioconstructivist accompaniment fosters a shared vision through the exchange of ideas about how team members conceive the prescribed change and debates that may contrast and compare ideas. Debate does not mean confrontation, but rather a recognition that exchanging with others influences beliefs and practices. During the process, descriptions of practices—one's own and those of others—bring people to examine or construct a vision of their own intervention models and find ways to explain it to others. This exercise is not always easy to carry out, but it helps people to understand their professional acts more clearly.

**Professional collaboration**

Professional collaboration involves the coordination of collective efforts as well as discussions that lead to group decision making and concerted action. Actions are regularly analyzed and adjusted at the group level in order to share responsibility for implementing change among team members. This form of collaboration is termed "professional collaboration" because it takes into account the viewpoints that colleagues bring to bear on various practices, discussing them and even questioning them, in a climate of mutual respect and trust. This can imply a certain degree of "professional intimacy."

## UNDERSTANDING PROFESSIONAL ACTS ASSOCIATED WITH COMPETENCY 5

Establishing professional collaboration in order to move a change process ahead entails professional acts and actions. The following are the main professional acts and a certain number of actions that provide a clearer understanding of this competency:

- Build partnerships with staff engaged in the change process
- Engage in the exercise in a spirit of collaboration, cooperation and dialogue
- Develop professional competencies for accompaniment both individually and collectively
- Construct a shared vision of the prescribed change

- Circulate information about resources, actions, and contributions among staff engaged in the change process
- Develop networks for sharing and communication between staff engaged in the change process

## Build Partnerships with Staff Engaged in the Change Process

Creating partnerships with staff engaged in a change process helps familiarize them with resources in the workplace and share leadership and responsibilities as well as duties. It also gets them more involved by including them in the accompaniment process as well as empowering them with regard to its implementation.

In this form of partnership, collaboration is initiated by setting up teams of colleagues. This is an essential step in generating interaction, which may then lead to sharing with a broader group of colleagues. The partnership includes all professional staff, but also makes room for executives to participate. It is part and parcel of the relationship the organization maintains with the workplace. Working in teams of colleagues is important for moving in the direction of the prescribed change and also fosters the development of professional judgment.

Working with colleagues to develop interventions and analyze them as a group delivers the benefits of teamwork, encourages engagement by team members in the change, and provides the mutual support that makes people comfortable with taking certain risks, etc. Describing practices—whether one's own or those of others—leads people to examine or develop a conception of their own intervention models and helps them explain them to others. This process allows participants to better understand and explain their professional acts and to establish a measure of coherence between what they think and what they do. It can thus help them maintain an equilibrium between thought and action in order to remain in harmony with their practices, but it also helps participants open up to others so they can better understand other people's actions and choices (Lafortune and Lepage, 2007). The simple fact of working together in a team often opens the way to different types of partnerships in the institution, organization, or business. This form of partnership requires a change in stance, which is not necessarily easy in certain workplaces.

## Engage in the Exercise in a Spirit of Collaboration, Cooperation, and Dialogue

Collaboration, cooperation, and dialogue foster teamwork and team synergy. Collaboration with various partners not only requires that people know their colleagues, but most importantly, that they believe in the potential for collaboration. The complex challenges of our modern world make it essential to forge close collaboration between partners. Individuals can contribute to implementing prescribed changes in accordance with their expertise, field of specialty, duties, and analysis of the change. Successful change depends on the mobilization and engagement of all those concerned. Working together towards a common goal and involving everyone in the workplace ensures the cohesion and consistency of the action plan at hand.

To encourage this type of commitment, participants are invited to verbally express their notions of teamwork and to create conditions favorable to the group. They reflect on certain questions or problems and work together on concrete projects. The commitment requires a sense of belonging and identification with the group, which the accompaniment helps develop. In the face of major change, staff come to the realization that they can no longer work in isolation. The scope of the change creates a collective responsibility. This is why it is important to work with a number of different partners and to vary the makeup of the work teams. The goal is to maximize contact between participants so that they do not face the change alone, to forge ties between those undergoing the change, and to help set up and maintain professional networks.

This form of partnership does not happen by itself—it is built gradually over time. Collegiality is not always as easy as we could wish, expectations are not always fulfilled, and results are not always obvious over the short term. It often takes perseverance, and success is achieved through group initiatives carried out with colleagues, who come to know each other better because of this collective experience. For example, the organization of the education program into cycles is a new structure to explore. In a private business, the equivalent could be work organized into various teams where the work of team 1 depends on that of team 2. This presupposes there is a work model to introduce, an opportunity to seize to establish a form of teamwork. Faced with change, people can feel isolated and insecure, so they need to work in interaction with others and develop team spirit by emphasizing the complementarity of roles and the development of professional competencies.

## Develop Professional Competencies for Accompaniment Both Individually and Collectively

By agreeing to develop collective expertise and professional competencies for accompaniment, staff come to realize the importance and necessity of doing this both for themselves and for others, but also with others. People undertake to share their individual expertise and at the same time benefit from that of the group. This stance requires an open attitude towards others and a great deal of humility, creativity, and professional autonomy.

In order to mobilize teams of colleagues and to establish a process of professional collaboration, participants may be invited to contribute to the training and professional development of teams of colleagues as well as the professional community to which they belong. Knowledge of the work or expertise of others, in addition to making it possible to share certain information or training, can also be a spur to cotraining (in which the team engages in a training process where team members undertake to provide various training components to the group) and mutual training (the team acknowledges the expertise of a member of the team so that members can train each other). The process capitalizes on the experience and expertise of team members or accompanied individuals. For example, if team members were asked to jot down the professional experience they have acquired over their careers (initial training, continuing education, work experience, positions they held, training they have given), this would provide an idea of the expertise they possess and possibly allow their workplace colleagues to benefit from it. Recognizing individual and collective resources in the workplace shows that accompanied individuals are valued. By acknowledging their expertise and work experience, we also add meaning to all the training sessions provided to staff involved in the change.

## Construct a Shared Vision of the Prescribed Change

The meetings that are part of the accompaniment process are a testing ground where people can exchange experiences, reflections, and individual or collective accomplishments. People share objectives, set collective goals and challenges, make decisions, and are called on to collectively solve problems concerning implementation of the prescribed change.

The meetings are a time to discuss, share, reflect, and act. People cooperate and build in interaction with others. They plan experiments or work on action plans, test things out (simulations, case studies, experiments) and sometimes even draw certain theoretical conclusions based on their practices. The group's input is ongoing (debates, contrasted ideas, individual and group efforts, feedback, evaluation, adjustment). No one knows everything but everyone knows something. Each person is enriched through contact with others and their experiences. Spreading the meetings out over time makes them more conducive to exchanging and comparing ideas and to sharing successful methods or experiences. The process leads to the construction of a shared vision of the prescribed change, an updating of practices, and the development of professional competencies.

From a socioconstructivist perspective, it is difficult to achieve a common vision or understanding because people build their representations based on their own experiences, previous accomplishments and competencies, and they do not necessarily have the same background or expertise as their colleagues. An accompaniment process can, however, help a group of people build a shared vision and understanding, or at least bring people closer and thus allow them to understand other people's point of view while continuing to move forward in the change process. Sharing a vision means examining and discussing how one views the change and debating one's vision and comparing it to that of others. This process is very important even if other people's visions are different in ways, or even quite opposite and disturbing to oneself or others (Lafortune and Lepage, 2007).

On occasion some people may be unable to grasp the vision the majority of their colleagues appear to share. They may only agree to it in part or even find it difficult to move in the same direction or at the same pace as everybody else. Such differences should not go unacknowledged, because they are preferable to a "forced" consensus to which people pay lip service, but ignore in their professional acts and duties. Acceptance of change cannot be imposed. It is an illusion to believe that people can be forced to change without being led to it gradually through an accompaniment process. To overcome their resistance, people need to freely express their differences, insecurities, and apprehensions. This is how they situate themselves within the change process and better gauge how far they have to go and the adjustments they will have to make.

To build a shared vision, people must keep an open mind about different conceptions of the objectives of the prescribed change. The change may not necessarily match the idea each individual has of it. To adopt and take ownership of the change, people must engage in a process of learning and adjustment that may lead them to modify their conceptions and update their practices through contact with others and with the content of the change. The adjustment process continues in a loop, constantly fueled by new data and new understanding of the change and its impact on their work life.

## Circulate Information about Resources, Actions, and Contributions among Staff Engaged in the Change Process

Drawing up a list of workplace resources makes it possible to more widely circulate information about actions and contributions in the organization. In addition to acknowledging and celebrating these contributions, circulating the information may spur other groups to draw on the individual and collective expertise of staff. The interactive dimension plays an important role in the accompaniment process. Exchanging with others allows people to examine and compare their progress with that of their colleagues and of other institutions or companies. Disseminating these discussions facilitates access to other practice networks, other sources of information, and so on. It reveals previously unknown expertise that otherwise would have remained in the shadows. This allows everyone to benefit from all the expertise in the community.

## Develop Networks for Sharing and Communication between Staff Engaged in the Change Process

Setting up a sharing and communication network is one way of fostering engagement in the change process. Virtual or online communication would appear to be a good option even though its use is not widespread in some workplaces. Networks are even more efficient if they disseminate the results of what was constructed with the groups and if the content is accessible to other people or groups. Such a tool helps people forge ties when they have difficulty meeting because of lack of time, their work, or distance between workplaces.

Implementing sharing and communication networks early on is particularly important to those engaged in an accompaniment process, for such networks serve a greater purpose than just engaging in a few networking activities. They develop over time as people interact more and more and involve different people and groups. They are enriched by groups revisiting each other's work, by meetings that draw on people from different groups, by websites or other means of communication that inform about activities elsewhere, by accompaniment documents that record the achievements and reactions of those accompanied, and so on.

Accompanied individuals can also become resource persons at work by integrating the tested approach in their workplace or creating a similar group. They can modify or adapt the accompaniment process or adjust the approach suggested in the training or accompaniment material, all the while developing and maintaining a conceptual thread, setting one or more accompaniment objectives, fostering the construction of new learning, alternating individual and collective effort, encouraging interaction, incorporating accompaniment training into the process, keeping evidence of the group's efforts, encouraging participants to adjust their beliefs and actions, ensuring that other accompaniment situations are revisited with other concerned staff, spurring people to act, and so on.

Mobilizing staff engaged in a process of change, updated practices, and development of professional competencies requires that one reflect on the roles of those who decide to engage in the process, including their training of colleagues and contribution to teamwork. It also requires people to have another look at the actions they choose and their way of working together in an organization, institution, region, across several regions, or provincially or nationally. Apart from this questioning of people's roles, mobilizing teams of colleagues facilitates the coordination of activities among different sectors or levels in an organization or institution. It ensures greater coherence in the change process and the updating of practices.

The arrival of new staff is often perceived as negative and unsettling for a team or group, who may have the feeling that they are regressing, stagnating, going backwards, having their group's work rhythm or chemistry changed, etc. On the contrary, new people breathe new life into a group, contribute new ideas and points of view, and suggest new tools. These new resources force the workplace community to take new perspectives into consideration and make new adjustments. They also reflect

staff movement in institutions, organizations, and companies. Leading people to recognize the contribution new staff make to a team is part of the process of accompanying colleague teams.

In conclusion, reflection on how to implement change reveals the importance and value of working in teams of colleagues, which involves developing professional competencies for accompaniment and "utilizing professional collaboration to move the change process ahead." Working in teams of colleagues fosters interaction, promotes reflection, spurs those involved to carry out collective experiments, and provides an opportunity to discuss, give feedback, and analyze practices and experiences. In this sense, setting up colleague teams is part of establishing professional collaboration between various partners. This complex process does not happen by itself and entails much more than just signing a contract between two parties. The relationship is built over time and is based on mutual trust and respect. It calls for an understanding of the requirements for accompaniment and is not imposed from the top down. It develops rather through discussion, flexibility, and reciprocity. It reflects the strengths and limitations of those involved, but also their collective achievements.

## QUESTIONS FOR REFLECTION Associated with Competency 5

*"Utilize professional collaboration to move the change process ahead"*

**At the beginning or during the process**

- What is meant by "professional collaboration" in a change implementation context?
- What is meant by "working complementarily?"
- What is meant by "working in consultation?"
- What is meant by "working in teams of colleagues?"
- What is meant by "cotraining?"
- What is meant by "mutual training?"

**During or at the end of the process**

- How can we work in synergy with a team of colleagues?
- How does working in a team of colleagues encourage the development of professional competencies?
- How does professional collaboration help implement a prescribed change?
- How does the development of a network for sharing and communication promote the updating of practices?

COMPETENCY 6

# Make Use of Action Plans to Accompany the Change Process

COMPETENCY **6**

## MAKE USE OF ACTION PLANS TO ACCOMPANY THE CHANGE PROCESS

### PROFESSIONAL ACTS

1. Discuss the nature of the change with a view to action
2. Prepare accompaniment tasks and situations to help implement the change
3. Encourage the mobilization and development of a knowledge culture in the accompanied workplace
4. Choose processes, contents, means, tools, or accompaniment materials that facilitate a professional development stance
5. Focus on approaches and practices consistent with implementing the change
6. Support the development, initiation, analysis, and adjustment of action plans

**ACTIONS**

### As an Accompaniment Provider

- Take steps to enrich one's knowledge culture
- Develop affective security in the face of the change
- Construct a representation of the change and share it with others to validate understanding
- Think about how people will react to questions and proposed actions
- Recognize the signs, causes, and consequences of resistance to the change.
- Verbalize one's mental processes
- Explain one's actions
- Monitor the progress of the change
- Exercise accompaniment leadership

### When Accompanying Others

- Choose actions, priorizing those that facilitate the understanding of the change
- Question, compare, and reexamine ideas, beliefs, representations, and practices
- Anticipate the reactions of those being accompanied
- Choose gateways and a process to follow in order to move the change forward
- Keep evidence of the process, the experiments conducted, and the progress achieved
- Collectively plan accompaniment
- Encourage participants to speak out
- Use techniques that encourage adjustment
- Review experiences with a critical eye
- Set goals for learning and change
- Justify approaches and practices by explaining how they tie in to goals
- Provide back-and-forth feedback on intervention preparation, predicting, implementation, monitoring, and analysis
- Encourage participants to self-evaluate with a view to professional autonomy
- Help foster a feeling of affective security in the face of the change

## COMPETENCY 6: CONCEPTUAL BACKGROUND

Major change inevitably has a destabilizing effect on organizations. In the face of a change, accompaniment providers work toward its implementation, seeking to understand and take ownership of it in order to make it part of their model of practice and harness it to move the change process forward in their workplace. To bring about the change, they discuss and reflect on the issues it raises and its implications for professional practice. Taking ownership is an important part of the process; it provides an opportunity to react to the change, anticipate how staff will have to adjust, and plan before taking action. It gives people time to absorb the impact of the change, understand its meaning, and examine how it ties in with their model of practice. Gradually, they will adjust their model in accordance with the change being introduced. This process is a complex one and may require significant modifications that need to be dealt with through the accompaniment process. People who adapt more easily to change may do so because the proposed model is closer to their model of practice, but in the event of a prescribed and directed change, everyone must engage in the process. From this perspective, accompaniment provides useful support. The phase of taking ownership is necessary because it lays the foundation of understanding required to act, but it is important to go a step further and initiate action. It is a powerful lever that enables all resources to be mobilized for change.

Action plans facilitate the change process, the updating of professional practices, and the development of professional competencies. They presuppose a close link between the planning, predicting, design, development, implementation, and evaluation of a set of tasks, at the same time taking into account the knowledge culture in the field and the accompanied workplace. Action plans are carefully prepared and are comprised of a set of professional acts, actions, and means that encourage collegial work facilitating change. Accompaniment providers (or dyads) work to put in place a complex reflective-interactive mechanism that encourages accompanied individuals to gradually engage in the change. This is achieved through interaction, using socioconstructivist accompaniment tasks and situations. People manifest their desire or intention to change or learn by engaging in the accompaniment process; initiating action by planning and developing action and accompaniment plans; conducting experiments in their workplace; and revisiting the process, means, and tools used to develop the competencies of the accompanied group.

Successfully implementing a change requires taking action and putting in place action plans that require thorough preparation and offer realistic opportunities for adaptation, given the learning paths of accompanied staff. By structuring action plans to accompany the change, accompaniment providers develop a long term vision to support those being accompanied. In doing so, they ask how their plans will support people working to develop new professional practices, or how they will foster buy-in to change.

Plan development helps mobilize change-inclined resources and knowledge culture. It provides support, followup, and continuity, and promotes the reinvestment of learning. During the planning process, accompaniment providers use their collective competencies by working with their colleagues. Together, they set priorities and choose actions, strategies, and means for the change. These action plans are structured for consistency with the foundations, aims and intentions of the change. In the course of planning, accompaniment providers question the object (the what) of their intervention and how they plan to achieve it. Together, they explore and discuss their actions and practices with a view to analyzing them, calling them into question, and regulating the outcome. They critically examine the means and actions implemented to develop and exercise their accompaniment leadership.

The action plan is generally spread over a number of meetings that include training aspects (theory and practice) and followups. In addition to furthering their understanding of the change through contact with their colleagues, participants develop a shared vision of the change. Plan development encourages participants to analyze, reexamine, and update their practices, test aspects of the change in their workplace, and discuss the process with their peers. Sharing of change-related experiences spurs individual and group reflection.

A plan like this has several components: a conceptual thread, intentions, actions and justifications, predicting, adjustments, reflection, and evidence keeping.

## *Conceptual Thread*

A conceptual thread explicitly clarifies the spirit of an action plan and is used to guide reflections and actions, establish links between the ideas set forth and the actions taken, and revisit these actions to articulate the meaning, connections, and cohesiveness of the accompaniment process (Lafortune, 2004c).

The conceptual thread allows participants to reexamine the ground covered (individually and collectively) by explicitly identifying the subjects and processes experimented with during the accompaniment process. It provides direction for reflection and action. It helps reframe, adjust, and regulate actions and the process. Contextualization of the conceptual thread developed over the course of a year helps foster awareness of the progress made, and establish links between past and future action, thereby facilitating planning. The conceptual thread helps clarify the meaning of actions, ensure consistency in the accompaniment process, and appreciate how consistency was achieved. By virtue of the conceptual thread the accompaniment provider ensures that the choices made are consistent with socioconstructivist accompaniment. It also opens up new avenues for reflection and action, and can even revitalize the reflection/action process.

The conceptual thread is linked to the theoretical foundations of the change and to the knowledge that accompanied persons have about these foundations, their accompaniment experiences, and the adjustments they make in the course of action. It is, in fact, a major challenge for them to adjust without losing sight of the conceptual thread of the accompaniment at an individual meeting, and without forgetting that it is part of a larger series of meetings that will take place over a longer period.

### *Intentions*

Explaining accompaniment intentions is a way to clarify action plan goals. Intentions are formulated prior to accompaniment in relation to the plan and in keeping with its scope. The intentions are realistic and take into account the ground covered by individuals and the group. They can be readjusted once action plans have been drawn up.

### *Actions and Justifications*

Development of an action plan involves describing planned initiatives, even going so far as to include the wording of the questions to be submitted to the accompanied persons. Accompaniment providers can draw upon their plans to explain and justify choices made during the accompaniment process, even in the midst of an intervention. This exercise helps frame the action; it gives accompaniment providers confidence and the feeling that they know where they are going and why they have chosen certain actions over others. This assurance rubs off on those they accompany, leaving them with an impression of being in good

hands. Describing the actions undertaken is an excellent way to record evidence of the accompaniment process as it unfolds. It can serve as a reference for those seeking to retrace the conceptual thread underlying the process.

## Predicting

Predicting is used to anticipate certain reactions by trying to understand their underlying rationale and the consequences they may have, not only on individuals and groups, but also on the progress of change. When drafting questions, accompaniment providers anticipate certain answers. This helps them validate the questions and develop subquestions that can be used to spur further reflection and discussion during the accompaniment process. By attempting to answer their own questions, accompaniment providers can also assess the difficulty, clarity, and accuracy of the questions. Certain questions may elicit answers that take the reflection off on new tangents. The idea is not to influence outcomes, but to ensure sufficient clarity for productive reflection. Predicting facilitates adjustments both before and during the process. Prediction accuracy can be reviewed and validated so that adjustments can be made for future action.

## Possible Adjustments

Despite our ability to predict various aspects of the accompaniment process, certain adjustments may be made midstream. Accompaniment providers must often adapt to situations that require them to modify their accompaniment strategies. Despite their willingness to readjust, they will evaluate the impact their changes will have with respect to the conceptual thread underlying the accompaniment process, so as to be able to explain and justify their adjustments.

## Reflecting on Competencies, Beliefs, and Practices

In order to reflect on competencies, beliefs, and practices, we need to ask whether action plans draw on the competencies of accompaniment providers and recipients, develop professional competencies, or enrich participants' knowledge culture. Choices about how to put a plan into action may be based on individual beliefs. Can people explain their choices, situate them within their model of practice, or link past practices to practices brought into play as part of the change?

### *Evidence Keeping*

Evidence keeping is important for understanding how accompaniment processes unfold, but also for identifying which aspects were easily implemented and which caused difficulties. This is useful for adjusting and improving the accompaniment process. Evidence keeping encourages reflection and analysis. It is also useful for reviewing learning outcomes from the process and for evaluation purposes. When developing action plans, the accompaniment provider determines which types of evidence should be preserved and how the information should be collected and used. Evidence benchmarks the accompaniment process and can be revisited at different times along the way. It is used as a starting point and as a tool for reviewing, measuring progress, retracing the steps taken, establishing ties between meetings, and taking stock.

## UNDERSTANDING PROFESSIONAL ACTS ASSOCIATED WITH COMPETENCY 6

Implementing action plans to accompany the change process calls for professional acts and actions. The following are the main professional acts and a certain number of actions that provide a clearer understanding of this competency:

- Discuss the nature of the change with a view to action
- Prepare accompaniment tasks and situations to help implement the change
- Encourage the mobilization and development of a knowledge culture in the accompanied workplace
- Choose processes, contents, means, tools, or accompaniment materials that facilitate a professional development stance
- Focus on approaches and practices consistent with implementing the change
- Support the development, initiation, analysis, and adjustment of action plans.

## Discuss the Nature of the Change with a View to Action

People are often disoriented by a major prescribed change because their points of reference change. They are pulled left, right, and center, attending all sorts of training sessions and grappling with a deluge of information, some of it not always reliable and even appearing to contradict the change. The pressure is heightened by the urgency of the change process, making it even harder to choose appropriate actions and set priorities. Taking a proactive stance on the change requires thinking about its significance in advance in order to avoid confusion, sidetracking, and loss of focus. Coherence among the choices made, the actions taken and the application of the change help to make the change understandable and facilitate acceptance by individuals. Exchanging views on the nature of the change, raising awareness, fostering dialogue, and asking questions that alternately unsettle or reassure and support are ways of lending coherence to the actions taken. Coherence is further enhanced by discussions on updating practices and developing competencies, which in turn require accompaniment providers and recipients to question, compare, and reexamine their ideas, beliefs, representations, and practices. The decisions made should favor actions that are in keeping with the change, the updating of practices, and the development of professional competencies.

## Prepare Accompaniment Tasks and Situations to Help Implement the Change

Preparation is a vital component of the accompaniment process. It includes the planning and predicting of accompaniment situations from a socioconstructivist perspective. Contrary to certain beliefs, preparation is a complex endeavor. Some people see it as a simple task; they think, "I'll build my process as I go with the people I accompany and make any adjustments needed en route." This approach betrays a lack of structure and method, and leaves too much room for improvisation. Preparation of action plans and accompaniment situations, including planning and predicting, requires analyzing the situations best suited to the circumstances of the accompaniment and the persons being accompanied.

During preparation, accompaniment providers anticipate the reactions of those they will accompany and build in the flexibility they need to alter their choices or methods midstream in response to questions

and reactions from accompanied staff and in keeping with the intentions chosen. Accompaniment planning entails establishing conditions favorable to the change and to the updating of practices. These conditions can be discussed with those accompanied, drawing on other accompaniment situations for ideas. Planning the accompaniment process gives accompanied individuals and learners an opportunity to contribute. During the process, they realize the advantages of working as a team and the important role their colleagues play in their professional lives. Group planning lets participants pool the results of their experiments and allows other teams to benefit from their experiences and from the materials and tools they used. It also encourages questioning, feedback, synthesis, and other such practices.

Accompaniment also entails adapting intervention techniques to the knowledge culture, workplace, and characteristics of the persons being accompanied. Taking individual and group dynamics into account may seem self-evident, but is not always easy to put into practice for it can require significant adjustments in initial preparation. Accompaniment providers may have to make choices or decisions in the heat of the moment. This "state of watchfulness" necessitates a high degree of adaptability. The diversity of expectations can also make the task difficult, especially for providers hoping to connect with all those being accompanied. Nonetheless, providers exercise accompaniment leadership by choosing actions that help the group move forward and that respond to overall group expectations, even if they do not meet all of the needs expressed.

Adapting and transferring accompaniment tasks and situations based on the needs of the accompanied group is another vital step. The accompaniment process can differ from one group to the next depending on the group's expertise, makeup, and evolution. This is why it is important to know both the issues raised by the change and the people affected in order to choose, in partnership with them, the gateway(s) by which they want to access change and the path of implementation. And this is why it is important to ensure that implementation progresses in their workplace.

Clarifying and taking into account the role of accompanied individuals requires careful planning. The role needs to be defined in a manner that is sufficiently flexible and open-ended so as to leave room for contributions from participants in the accompaniment process. Planning should incorporate tasks that encourage them to get involved in the planning process themselves and to express their reflections, ideas, and perspectives on the change and the accompaniment. Another way to foster their engagement is to have them make choices, using

methods that promote reflection and adjustment, experimenting with aspects of the accompaniment inside the very process, or providing them with an opportunity to report back to the group on their analysis and critical reflections regarding experiments conducted outside of the meeting framework.

The goal here is to draw from and make new use of the accompaniment process to ensure that the change has an impact in the workplace. The question to ask oneself and those being accompanied is how to adapt or transfer the process so that it can be used with other colleagues. This facilitates the transference of learning outcomes and encourages action. The expectation that outcomes will be recycled in professional practice makes it easier to initiate action or accompaniment as part of the change process.

Each accompanied group adopts its own path, thereby affecting the actions initiated and the choices made. Even if actions dovetail with the theoretical foundations of a change, they cannot be appropriate for all situations. The persons being accompanied transfer the accompaniment process by adapting it to their circumstances, which may have similarities with those of other staff affected by the change. To do so, they are encouraged to keep evidence of their accompaniment process and the experiments conducted in their workplace. This makes it possible to monitor the progress of accompanied persons and groups and help them understand their own path through the process.

## Encourage the Mobilization and Development of a Knowledge Culture in the Accompanied Workplace

People engaged in a process of change will necessarily draw upon and develop their own knowledge culture. The announcement of a major change forces them to question the rationale behind it. Change introduces new concepts, some of which may not yet be clearly defined by the scientific community. Indeed, the concepts continue to evolve and will eventually stabilize under the ongoing scrutiny of both the scientific and practice communities. In the course of a change, personnel must also learn new terminology. The introduction of new terms marks a change in how things are described, but people still need time to fully comprehend and take ownership of this terminology, even as they continue moving forward in implementing change. They are called upon to tie in their existing knowledge with the new things they are learning about the change at hand. However, this knowledge culture is more than just a

body of knowledge. It also comprises abilities and attitudes, and the change-related strategies that people need to know how to use and justify (see Lafortune and Martin, 2004).

Socioconstructivist accompaniment must take into account the knowledge culture of the accompanied workplace, the actions already undertaken, and the organization's mode of operation. This can be achieved by clarifying intentions and not hesitating to question them if they are overly ambitious or inconsistent with planned actions. Discussing intentions in light of the action plans under development in accompanied workplaces is also beneficial.

Accompaniment providers also help develop knowledge culture by sharing their expertise and experience and encouraging cotraining and mutual training initiatives with the groups they accompany. Mutual training initiatives involve the sharing of expertise and are prepared by colleagues. Cotraining initiatives stem from a collective decision by all members of the team to self-train in the aim of sharing new learning with their colleagues. To take ownership of a change, participants discuss its foundations, read new reference materials, explore new authors, and consult various sources of information. The mandate for change spurs them to seek out new resources. As they navigate the change process, they raise new questions and tackle new problems. This situation has a snowball effect that impacts everyone directly or indirectly affected by the change situation. Researchers also take advantage of the momentum to publish studies that shed light and inspiration on the change at hand.

## Choose Processes, Contents, Means, Tools, or Accompaniment Materials That Facilitate a Professional Development Stance

Faced with imminent major change, people undertaking an accompaniment process react by expressing a wide variety of needs that reflect their enthusiasm, fear, resistance, or openness to change. These needs may be personnal, professional or organizational. As the process unfolds, participants who engage in it gradually modify their stance. In the early stages, they tend to adopt a "wait and see" attitude, expressing needs as requirements they wish to have met. Subsequently, they adopt a "professional development" stance, a proactive attitude that manifests itself in goal setting and in taking action for learning and change. This change in stance is likely due to their degree of engagement, but also to the fact

the socioconstructivist accompaniment approach encourages them to act as partners by making choices, experimenting, and drawing on their experience and expertise. As a result, they set learning intentions, navigating the process, and developing professional competencies.

Creating an environment conducive to the updating of practices often means taking time to meet needs that facilitate implementation of a change and gradually lead people from a "wait and see" stance to a "professional development" stance. To achieve this, persons being accompanied are encouraged to

- Deepen their understanding of the change; examine their practices and adapt or adjust them in accordance with the prescribed change
- Learn what the change entails (direction, foundations, approaches, etc.)
- Enhance their knowledge culture to better understand the nature of the change
- Develop a level of affective security about change (accept uncertainty, tolerate ambiguity) (Vallerand, 2006a, b); modify their conceptions and construct a representation of the change
- Share their vision of the change with others to validate their understanding of events

## Focus on Approaches and Practices Consistent with Implementing the Change

It can be difficult to deconstruct ideas about specific approaches that provide answers, but can also divert attention and interfere with practice updating by disregarding the foundations and goals of a change. Reflection may consist of determining whether proposed approaches and practices are consistent with implementation of the change. An in-depth assessment of these approaches and practices may be used to justify a particular choice by clarifying how it ties in with the goals of the accompaniment situation. Here is an example from the field of education that illustrates the importance of identifying approaches and practices consistent with implementing change. In the education community, certain professional approaches and practices are widely appreciated because they develop student skills and autonomy or focus on the way students learn. Not only are these practices and approaches reassuring for teachers, who are already familiar with some of them through training, they

can also be stimulating for students. However, it would be unfortunate to boil down proposed changes in the field of education to one or another of these approaches or practices and to use it as a sort of flag bearer for the reform.

## Support the Development, Initiation, Analysis, and Adjustment of Action Plans

Accompanying action plan implementation means supporting plan development. This involves working with those who will put the plans in place while at the same time respecting their professional autonomy by affording them sufficient leeway on content and plan management. Facilitating plan integration implies that plans are representative of the people involved; ensuring this requires familiarity with the accompanied staff. Autonomy fosters action and encourages ongoing analysis and adjustment of accompaniment tasks and situations. Action plan success depends largely on preparation, which should be rigorous, flexible, and realistic. In developing an action plan, accompaniment providers clarify their own intentions, conceptions, and values and clearly indicate the type of accompaniment best suited to the desired change. Ideally, the proposed actions should be tied to the accompanied person's duties. Action plans are drawn up with a view to assisting with accompaniment or the development of professional competencies. Far from adding to the workload for no purpose, action plans tend to complement actions already undertaken in accompanied workplaces. Their purpose is to help people move from a position of insecurity to one of relative security, not losing sight of the fact that all change requires time, and that participants are themselves changing even as they learn to accompany change in their respective workplaces. It is for this reason that concrete initiatives are part of a workplace action approach with some of the characteristics described below.

Creating conditions conducive to change, updating of practices, and development of professional competencies makes it possible to implement a genuine accompaniment process rather than simply juxtapose a series of ad hoc training sessions. Providing the necessary support helps ensure reuse, continuity, and consistency. Putting the right conditions in place makes it easier to transfer accompaniment process learning outcomes into practice with different groups of staff affected by a change.

## Anticipating Questions, Answers, and Reactions

To suggest or elicit ideas for transferring accompaniment learning outcomes and promoting their reuse, accompaniment providers need first to go through the exercises themselves to ensure that ideas flow freely and are pertinent, worthy of interest, and at least partially organized. It is important for them to know how some of the questions they ask are likely to be answered and to try to anticipate other questions that may arise in the accompaniment process. Anticipating reactions to questions and suggested actions, planning justifications and answers, and thinking of examples, modifications, transferences, and other accompaniment or learning situations are all excellent ways to observe what happens during the process, but also to facilitate adjustments in midstream.

Anticipating resistance to change by seeking to recognize its manifestations, causes, and consequences and by envisaging possible solutions for dealing with it are two means to help understand it and take suitable action. It is sometimes hard to determine why people resist change. Accompaniment providers try to identify which elements they control in dealing with this resistance. The simple act of trying to understand these reactions has a positive impact on accompaniment. Generally, the reactions are clearly visible, but the causes are harder to identify; even people who reject change do not always know what their reasons are. Shedding light on resistance and its manifestations usually helps point the way to a solution. Helping people formulate and justify their reservations leads to dialogue and encourages mutual understanding. People are more open to finding a solution—and there is a good chance they will end up accepting the implementation of some or many aspects of a change.

Listening to people and taking their resistance to a change into account may mean being attentive to their fears and apprehensions and trying to identify their source in order to act on the underlying causes, at least those over which one has some control. Understanding resistance helps accompaniment providers react to it positively; giving consideration to both change resistors and change enthusiasts helps develop a shared vision of the change. Often, people who outwardly show resistance want to fully understand the change in order to better take ownership of it. Their reactions can be interpreted as an obstacle to change, but also as an opportunity to explain it more thoroughly. Their questioning can be productive because it forces a deeper understanding of the change. These resistors want to understand why they should do things differently and often adopt a critical attitude toward change. At the same time, some of their questions or comments may be perceived as threatening by those

who have already bought into the change, even undermining their engagement. The accompaniment process encourages the airing of sometimes divergent views, but the comparing and contrasting of these ideas forces people to clarify their perspectives and can facilitate understanding of the change process.

## *Initiating Action by Preparing Interventions in the Workplace*

Prescribed change, even if it is thought through, comes about through action. The amount of work this entails varies depending on the scope of the change and the resistance it provokes. But the leap from reflection to action is by no means impossible. To help people gradually change their professional practices without discouraging them, it is important to encourage realistic goal-setting that shows change is possible. Through this type of support, accompaniment providers help people collectively construct ideas that can be transferred to other situations. They do so by providing a means to record actions for subsequent review and discussion so they can be used as fodder to develop other actions. Although the "small steps theory" may seem like an attractive strategy, it merits discussion in order to avoid the risk of maintaining a status quo situation that fails to spark serious questioning or engagement in change.

Accompaniment providers foster engagement and help spur action by using socioconstructivist techniques and building, in conjunction with others, the tools and materials of socioconstructivist accompaniment. For example, coevaluating the work of students in order to harmonize the evaluation practices of a school team and validate evaluation tools can challenge teachers' ideas about evaluation and give them a greater understanding of how it can be used as a learning aid and competency marker. The resulting evaluation tools will better reflect the foundations of the prescribed change and be consistent with professional practices.

Implementing change entails initiating action through intervention planning that involves back-and-forth interaction with respect to intervention preparation, execution, followup, and analysis. To ensure renewal, the accompanied staff can gradually be brought on board as active participants in the accompaniment process, trying their hand at synthesis, feedback, and questioning, taking on the leadership of part of the process, planning or attempting experiments in their workplace, and reporting back to their colleagues on the results. Keeping evidence of these actions for discussion and feedback purposes helps generate understanding of the ties between these interventions and the demands of the

change. All actions, no matter how interesting or stimulating they appear, need to be examined in relation to competency development or the goals of the change.

## Modeling Accompaniment

Accompaniment providers are called upon to exercise leadership and spur reflection on prescribed change from an action perspective. They act as a bridge between those instigating the change and those incorporating it into their practices. One technique they use extensively is modeling, serving as examples by verbally "acting out" the process and mental approach involved and openly expressing their own doubts and questions as they go. Modeling helps those being accompanied to understand the strategies, attitudes, stances, and competencies demonstrated by accompaniment providers and to grasp how they are used. Providers "practice what they preach," actively demonstrating their process and approach by doing, showing, and explaining and by exploring transferable ideas. This technique ensures consistency between their thinking and their actions, their beliefs and their practices—in short, between their words and deeds. By making the what, how, and why of their actions visible, providers present their interventions as transferable models.

## Providing Feedback on Intervention

Feedback on interventions not only serves an adjustment function, it also propels the change forward and helps encourage the updating of practices and the development of competencies in the workplace. It is a way of closely monitoring the status of the change and its implementation. Feedback entails reflecting on actions taken, explaining the choices made, clarifying who develops competencies and for what purpose, thinking about necessary adjustments, and self-evaluating in the aim of achieving greater professional autonomy.

## Capitalizing on Action Plan Interactions

Group accompaniment entails developing action plans. Often, this involves finding ways to spark people's interest in plans suggested by their peers. Even when accompaniment providers present plans that are not their own, they must keep the interests of the group in mind and continue to meet its special needs. Learning to capitalize on interactions allows providers to realize that they can enhance their own expertise by

drawing on that of others and on their views of accompaniment. In addition to the content and processes discussed, knowledge of other people's actions influences one's own strategies and approach to intervention and encourages the sharing of intervention techniques, tools, and ideas. This knowledge leaves people actively poised to examine and reflect on practices, learn useful lessons for accompaniment, and even integrate these practices into their approach. It is sometimes easier to criticize or see the weaknesses in other people's proposals than in one's own. "Socioconstructivist accompaniment presupposes ... a process of collective coconstruction [and] implies a step-by-step approach guided by reflections, social interactions, and collectively analyzed actions that may lead to adjustments before any further action is taken (Lafortune and Lepage, 2007, p. 37 [translation]).

In conclusion, change cannot be implemented without taking action. This is why "making use of action plans to accompany the change process" is such an important competency to develop. When organizations start to implement a change, accompaniment providers sometimes take ownership of the change, modifying, analyzing, and adjusting their practices and engaging in a professional development process. However, they must not stop there. The second crucial step is to initiate action, both on their own and on the part of those they accompany. Therefore, accompaniment requires two levels of action.

## QUESTIONS FOR REFLECTION Associated with Competency 6

*"Make use of action plans to accompany the change process"*

**At the beginning or during the process**

- What is an action plan for implementing a change?
- Why are planning and predicting important phases in preparing an intervention?
- What motivates the commitment to initiate action?
- How would you define and explain the modeling of one accompaniment process?

**During or at the end of the process**

- In what way is evidence keeping a professional act?
- How is knowledge culture mobilized in an accompaniment situation?
- How can feedback on interventions be provided from a socioconstructivist perspective?
- In what way does thorough but flexible preparation lay the groundwork for accompanying a prescribed change?
- How can accompaniment providers help accompanied persons overcome their resistance to change?
- What can be done to help foster a professional development stance?
- What can be done to carry out action plans rather than juxtaposing ad hoc initiatives?

COMPETENCY 7

# Use Evaluation in the Change Process

COMPETENCY 7

## USE EVALUATION IN THE CHANGE PROCESS

### PROFESSIONAL ACTS

1. Ask staff how they perceive the change and its progress in the workplace
2. Observe how the change evolves
3. Analyze how the change evolves and the extent to which it is implemented
4. Adjust one's actions over the course of the intervention
5. Write analytical summaries of one's actions and those of accompanied individuals

### As an Accompaniment Provider

- Be aware of one has evolved oneself
- Consider evaluation as an accompaniment aid
- Step back from the action to analyze it and make adjustments
- Put in place means to evaluate professional competency development
- Set observation goals and criteria
- Examine one's practices along with those of colleagues and accompanied individuals
- Evaluate one's development and progress

### When Accompanying Others

- Spur reflection on intervention and evaluation practices
- Consider various evaluation practices to follow the change as it evolves
- Keep evidence of progress
- Measure the progress of accompanied individuals
- Share and discuss one's observations and reflections
- Analyze how the change has evolved and adjust intervention
- Get staff to interact, work together, and consult each other at various times about adjustments to be made
- Build the accompaniment sequence according to choices, needs, progress, and expertise

## COMPETENCY 7: CONCEPTUAL BACKGROUND

Evaluating the progress of a change process is a complex undertaking, even more so if it involves evaluating both the extent of change implementation and how the professional practices of accompaniment providers and recipients have evolved. This complexity is due to a number of factors, but the socioconstructivist perspective is certainly one of them.

In change accompaniment, the socioconstructivist perspective encourages those concerned with how much progress has been made toward the change or the development of change accompaniment competencies to examine the change process itself and those implementing it. They need to evaluate two aspects: how the change is coming along and how successful people have been in updating their practices. No matter what is evaluated, though, accompaniment leadership in a change accompaniment process is participatory rather than hierarchical. Great importance is therefore given to the contribution and engagement of accompanied staff, which is why the evaluation process has special significance.

Such a conception of evaluation differs from what is most often heard. According to a certificative or hierarchical conception, evaluation is perceived as a professional task incumbent upon an individual charged with evaluating another individual, group of individuals, or organization in order to judge their actions based on tasks to be performed, employer expectations, or professional or business development objectives. This type of evaluation is primarily concerned with making individuals, groups, organizations, institutions, or businesses accountable for their actions. Evaluation is most often entrusted to an executive (or an individual or firm from outside the company) who is not necessarily looking for input from others or the individuals or groups being evaluated. In many workplaces, however, changes are occurring in how work is organized. Collaborative practices are increasingly replacing hierarchical ones and consequently influencing evaluation practices.

The competency at hand looks at evaluation from two different angles: that of accompanied individuals seeking to update their practices and that of progress toward change implementation. Such evaluation is part of a perspective aimed at facilitating professional development and change implementation. The evaluation process therefore involves looking at evaluated individuals both in terms of personal progress and how they are going about implementing the change. It is an opportunity to discuss strengths as well as items that can be improved upon while considering what challenge the accompanied individual wishes to meet and

while also bearing in mind not only the organization's or company's objectives, but the goals of the change. Performing an evaluation from a perspective of professional development assistance requires time to integrate learning or implement change. It affects how change implementation is evaluated. On the one hand, people progress as they implement the change; on the other, their progress in the change process ensures that they update their professional practices.

**Evaluation in change accompaniment**

In change accompaniment, evaluation concerns two aspects: the updating of professional practices by those implementing the change and the extent to which the change is implemented. In this sense, evaluation is a complex procedure that involves casting a critical eye on professional practices to gauge one's own progress as well as the progress of accompanied individuals in a change process or professional competency development process for change accompaniment.

According to this conception, evaluation practices assist and support change accompaniment. They are applied from a perspective of progress and professional development, while taking into consideration prescriptive elements and the aims of the change to be implemented in the workplace. Evaluation is carried out using data collected from accompanied individuals, according to clearly stated criteria. Once analyzed and interpreted, this data is discussed with staff, who can then measure and validate the progress or development of their professional competencies to accompany the change. According to this conception, evaluation practices help to guide the choice of future actions and to decide which measures to take to pursue professional development and keep a change process moving forward. In the socioconstructivist accompaniment of a change, evaluation is reflective-interactive, i.e., it emphasizes the reflection, contribution, and engagement of accompanied individuals, while taking their ideas, values, points of view, and professional expertise into consideration. Evaluation also helps to identify, analyze, and understand the extent of the change's implementation, what has in fact been implemented, the time it took, and the degree of autonomy achieved through the change process.

According to Hadji (1997, cited in Legendre, 2005, p. 630) evaluation in education is a "process of comparing and contrasting expectations with reality." It is "a systemic search for information about student learning and construction of a judgment according to progress" (Linn and Grönlund, 1995, reported in Legendre, 2005, p. 630 [translation]). In the accompaniment process, evaluation can help not only with learning or professional development, but also competency recognition and progress reports (MEQ, 2003).

In change accompaniment, it could also be said that evaluation is for comparing ideas about the change and questioning the worth of practices (what is being done and what should be done), their effectiveness (what should be changed or improved on, given the change and its prescribed elements), and the positive and negative effects that certain practices could have when considered from the perspective of the desired change. Evaluation therefore helps staff faced with implementing the change. It aids their professional development and helps accompanied individuals recognize the progress they are making in the change process.

Evaluation is a professional act. It is hard to boil it down to the application of rules and procedures or gloss over the other partners involved in the process. When a change is implemented, evaluation also takes into consideration all the people involved in the accompaniment process. To reflect the task's complexity, requirements, and scope, it is instructive to reexamine and discuss one's beliefs and perceptions with regard to evaluation practices in order to put them into perspective by comparing them with the change requirements and adjusting them based on group input. Accompaniment is conducive to putting in place teams of colleagues to foster and support discussions about the notion of evaluation, which may lead to hard questions. Such accompaniment is part of a reflective practice that takes a critical and thorough look at evaluation practices. Evaluation is an act that leads to decisions that require discipline, coherence, and transparency. Professional acts are associated with this competency—acts concerning evaluation of the accompaniment process, but which may also concern the updating of practices by staff affected by the change, as well as the extent to which the change has been implemented.

In a change process where evaluation is used, accompaniment is conducive to ongoing reflection about actions and their continuity and their consistency with the aims of the change. Such accompaniment spurs reflective practice and an updating of practices if it leads to critical examination, questioning, actions, and analysis of these actions. It is in keeping with a socioconstructivist perspective if the process presupposes reflections/interactions that contrast and compare practices and beliefs (conceptions and convictions) and lead to sociocognitive conflict, which makes for greater coherence or enhances awareness of inconsistencies and enables one to verbalize them, share them, and discuss them (for more, see Lafortune and Deaudelin, 2001; Lafortune and Martin, 2004; Lafortune and Lepage, 2006). When a major change is implemented, many

past evaluation practices tend to be called into question, while others need to be reviewed so that they are more in line with the foundations of the prescribed change.

With this competency, evaluation is approached from the viewpoint of updating professional practices. It can fulfill two roles, the first one being to help accompanied individuals make progress and the second one to recognize their progress and report on the success of the process. When evaluation is used in accompanying a change process, the help function refers to the support provided to the accompanied individuals. It presupposes that accompaniment providers will look at the progress of the people they are accompanying in order to work with them to find ways to help them develop and progress as the change is implemented. Accompaniment providers consider the accompanied individuals' progress by giving them more responsibility as the process moves forward. Throughout the process, providers will call on self-evaluation, coevaluation, and mutual evaluation. Use of these evaluation practices in the workplace is still embryonic, given how complex it is to use their results to help people make progress. Comments from accompanied individuals can help both accompaniment providers and recipients clarify remarks or put into perspective any impressions they might have about the progress they or their coworkers are making in the change process. This type of evaluation ensures discipline, coherence, transparency, and a certain fairness.

It is important to discuss the evolution of the change with those being accompanied. What do they think? How do they rate their progress in the change process and that of the people they are accompanying? How can evaluation help move the change process forward? How can the results of these evaluation practices be used to help people change? What spurs them to change, to engage more in the change?

Evaluating how well practices have been updated and the extent to which a change has been implemented is considered to be a professional duty, which presupposes accompaniment. It is demanding since it is part of a professional development process. Accompaniment providers are therefore themselves transformed by the accompaniment they are called upon to provide. Knowledge of a field of expertise, a workplace, or the individuals who make it up impacts the change accompaniment process and how it is evaluated. Discussion and sharing, as well as comparing, contrasting, and challenging ideas can lead to conflict, resistance, and withdrawal. This is especially true when discussing evaluation and how well individuals have progressed in the change process. Accompaniment providers support and guide others; they think about their own

practices while adopting reflective postures, which are reflected in their accompaniment actions and their own ways of evaluating. Accompaniment providers work with others to try to clarify the meaning of the change to be brought about, and together they come up with means and conditions that pave the way for change.

To use evaluation in a change process, accompaniment providers

- Develop and exercise professional judgment and accompany the development and exercise of professional judgment by others
- Understand what is being evaluated—i.e., the degree to which change is applied and practices are updated—and help accompanied individuals understand it
- Strike a balance between action and reflection, especially when evaluating
- Bring out beliefs and explain practices involving change, which helps the evaluation process
- Seek the means to understand resistance to change and to evaluate accordingly
- View evaluation as a change accompaniment process, depending on the intervention context

The accompaniment process is built around evaluation of how practices have been updated to address the change and brings with it a number of principles unique to socioconstructivism:

- Reflection in and on action taken to update professional practices
- Coconstruction of a collective model of practices that fit the change
- Interaction with peers, colleagues, etc. that leads to reexamination, greater awareness, and partnership and collaboration
- Teamwork with colleagues that advances discussions on how to develop fair, equitable, coherent, thorough, and transparent judgments

These principles are relevant in as much as they are transposed and used in the action. The intention is to accompany staff as they update professional practices to fit the change and speed its implementation. This presupposes a reflective practice (adapted from Lafortune, 2008a). Other principles may be put forward to bring about such accompaniment. The following three principles demand the development of

what might be termed "a meta perspective," which is a means of providing observations to accompanied individuals without passing judgment, the intention being to take action, share information, and perform a collective analysis. For accompaniment providers, these principles mean making adjustments on the go, taking risks, and accepting disequilibrium in others and in oneself.

1. Get colleagues to respectfully share ideas, knowing that differences of opinion may arise. This can be done by examining current practices. It is possible to use the professional practices of those being accompanied as a starting point. They can be studied to see how well they fit with the change. As an accompaniment provider, it is easy to succumb to temptation of the status quo so as not to overly disturb those being accompanied. This does not facilitate new learning or spur progress in a change process, however. Showing "sympathy" in this way does not favor change or encourage accompanied staff to engage in undertakings that will help them to continuously improve and develop as professionals. Ways must therefore be found to bring out contradictions and spur reexamination, while bearing in mind that resistance will be automatic if the disequilibrium is too great. The right balance must be struck between accepting practices and questioning those that are to be changed or adjusted. This requires observation skills and openness to constant adjustment or ongoing improvement over the course of the accompaniment process.
2. Bring out the richness associated with the various beliefs and practices that contribute to implementing the change. This can be achieved by provoking a reexamination of beliefs and practices while stressing the richness of differences. It is also a way to gain greater acceptance for inconsistencies. At this stage, diversified opinions are encouraged, but it is important to insist they be justified. This means attention must be focused on the positive, although without disregarding any inconsistencies that reexamination brings to light.
3. Develop the ability to listen to and interpret arguments and justifications. Beyond the actual words being used, what are the real reasons for what is being said? Is the justification a pretext for resisting change or is it based on solid ground? Whatever the nature of the arguments, they often convey real fears that should be listened to so that an appropriate response can be made to foster a change process (Lafortune 2008a).

To foster commitment to a directed change or one that includes prescriptive elements, professional practices are essential to supporting staff in their change process. While raising awareness about change in a spirit of progress and moving forward, professional acts for this competency encourage staff to engage in the change, foster gradual and ongoing improvement, set individual and collective challenges, and try to meet them with the help of the accompaniment provider and other staff involved in implementing the change.

## UNDERSTANDING PROFESSIONAL ACTS ASSOCIATED WITH COMPETENCY 7

Using evaluation in a change process presupposes professional acts and actions that seek to support and guide staff involved in the process. Even though the change is prescribed, it cannot be imposed by force. Staff must be brought to see the change as an opportunity to improve their practices while continuing to develop as professionals.

The following are the main professional acts and a certain number of actions that provide a clearer understanding of this competency:

- Ask staff how they perceive the change and its progress in the workplace
- Observe how the change evolves
- Analyze how the change evolves and the extent to which it is implemented
- Adjust one's actions over the course of the intervention
- Write analytical summaries of one's actions and those of accompanied individuals

### Ask Staff How They Perceive the Change and Its Progress in the Workplace

Assisting staff in making progress in the accompaniment process presupposes reflection and questioning about how they perceive the change, the resulting changes to their practices, and development of their professional competencies. Questions may concern the intervention practices, but also to what extent the change has been applied in a given workplace. The professional practices that help lead to questioning and understanding

of the change and the extent of its implementation include feedback; proactive, interactive, and retroactive adjustment; and self-evaluation, coevaluation, and mutual evaluation. Asking questions provides an opportunity to see where accompanied individuals stand with regard to the accompaniment process and the implementation of the change in order to get a better idea of the extent to which the process has developed and how much progress people have made with regard to the change or how engaged they are in it. Questioning fosters new awareness that leads those being accompanied to follow their own progress, along with that of their colleagues or the group they belong to, and see how it fits with the change to be implemented in a given workplace.

## Observe How the Change Evolves

To be able to observe, make observations about how the change is developing, and discuss these observations, one needs to keep in frequent contact with colleagues or the various people associated with the change being implemented and follow up on actions and professional practices. The accompaniment process uses diverse strategies, and observation is a particularly useful one. It may seem easy to observe accompanied individuals, but doing so requires planned accompaniment situations where one observes what is transpiring, wonders what previous reactions were like, and seeks to understand attitudes and reactions that arise in the thick of the action. It also requires observation criteria so as not to lose the conceptual thread of the accompaniment process. Depending on one's intentions, it may be necessary to make other people aware of one's observation intentions and the criteria chosen for the process. In some circumstances, it may be instructive to have accompanied individuals take part in an observation process by inviting them to observe themselves. Such a process requires sound knowledge of the people, group, or workplace. Observation calls for a close connection with others and the actions they are engaged in. One must pay close attention and keep evidence by taking notes throughout the observation process or shortly afterward in order to keep track of changes that occur and understand subsequent findings.

Observations fuel reflection. They help learn more about one's own actions and those of others, and about what one has experienced, either alone or with colleagues. Individual and collective reflection helps draw lessons from these experiences by observing reactions, limits, high points, challenges, individual and collective strengths, and more. Observation provides an opportunity to step back from the action to see what can be

consolidated, improved, changed, or explored further. It lets us analyze situations and adjust interventions according to the progress of individuals and the change itself.

## Analyze How the Change Evolves and the Extent to Which It Is Implemented

Analyzing the development of a change and the extent to which it has been implemented presupposes observing one's own practices and those of colleagues and accompanied staff by using various tools, processes, means, and criteria. In addition to fostering better understanding of the anticipated change, various processes and means can be used to analyze the development of the change and the extent to which it has been implemented. These processes and means include

- Interaction (exchanges, sharing, discussions, comparing and contrasting)
- Coconstruction (alternating between individual and collective work and consultation or cooperation with others as well as making connections between theory and practice)
- Questioning (moments of reflection, accompaniment interviews, questionnaires, etc.)
- Synthesis (brainstorming, drawing parallels)
- Feedback (reflective and interactive)
- Modeling (adapting what accompaniment providers say to how they intervene through concrete examples that prove how actions can fit the words)
- Reflective practice (moments of reflection, metacognition, practice observation, professional competency development)
- Evaluation (self-evaluation, coevaluation, mutual evaluation, observation, adjustment)
- Evidence keeping (information sheets to record learning outcomes and personal challenges, synthesis development, accompaniment journal, etc.)

Reflective-interactive feedback on experiences of implementing the change encourages followup and support for such implementation. By carefully following staff and engaging with them and the accompanied group, one moves them to act. Modeling can be achieved by self-

evaluation practices over the course of the process. This means "being an example" through self-evaluation in an accompaniment situation by giving verbal expression to one's reflections in front of other group members, bearing in mind the process's conceptual thread. When evaluation is used in accompanying a change, it can be aimed at providing assistance with professional development or suggested as an accompaniment aid. In this sense, feedback and questioning—which spur interaction and reflection—are considered appropriate.

## Adjust One's Actions over the Course of the Intervention

Accompaniment providers are called upon to adjust their actions throughout the accompaniment process. Interactions with others and the collaboration and consultation that predominate throughout the process lead them to take into consideration the accompaniment situation, the progress staff have made in the change process, changes to practices, and development of professional competencies. Even though the accompaniment's intentions are consistent with the change to be implemented, groups will not necessarily all progress at the same rate. By applying evaluation practices, accompaniment providers ponder the adjustments and modifications to be made in order to improve the accompaniment process. They do this by considering accompanied individuals as committed partners who intend to learn about the change and seek to rally around a shared vision of the change, but also by holding that each group's progress does not follow a predetermined or interchangeable sequence. The accompaniment sequence is drawn up in conjunction with the groups according to their choices, expressed needs, progress, and workplace expertise, while taking their actions into consideration.

Accompanied individuals will also adjust their actions over the course of an intervention in relation to the accompaniment process. Their progress and the interactions they have with the accompaniment provider and others in the group will lead them to adjust and change their practices in the course of the process in so far as they continue to progress through the change process. They make their expertise (training and experience) available and also draw on the group's own expertise. By engaging in the process, they are helping to construct a vision of the change. This construction alters not only how they perceive the change, but also the conceptions they have already developed through their training and work experiences.

## Write Analytical Summaries of One's Actions and Those of Accompanied Individuals

Even though the aim is the same, i.e., "accompany the implementation of a prescribed, directed change," accompaniment material, processes, means, and tools may differ from one group (or individual) to the next. The gateways are not necessarily the same, nor the intentions to learn or change. Moreover, the conceptual thread for the accompaniment sequence can vary considerably from one group (or accompanied individual) to the other, even if aspects like processes, means, themes addressed, and the structure of meetings remain largely the same. This is why it is useful to write analytical summaries on the actions undertaken and the accompanied individuals at various stages of the accompaniment process, and to adjust the actions accordingly and in relation to intentions to learn, change, or accompany, and then add them to the conceptual thread.

Thinking about helping accompanied individuals acquire the means to evaluate the development of their professional competencies can help them to progress in the change process. One way of doing so is to come up with actions to put in place, keep evidence of their progress, and analyze the results to get a better understanding of how the actions evolved. This is a way to measure how well actions reflect intentions. People might wonder if what they are already doing is in line with the change, or may acknowledge what they could do to be more consistent with the change. The time people spend reporting on progress helps them take personal stock of their engagement and success in the process, and also their colleagues' or teams', by promoting reflection and the contrasting of ideas. In the accompaniment process, it is important not to confuse comparing ideas (reexamining ideas) with confrontation (a discussion aimed more at convincing others than developing new ideas with others). The former moves ideas forward and helps build new ones through interaction, while the latter is minimally conducive to constructing knowledge let alone coconstructing ideas, finding solutions, or solving problems. The point is to evaluate practices in a spirit of assistance and support, rather than in a spirit of accountability to management or authorities.

Various aspects of the accompaniment process can be evaluated (learning outcomes, challenges, perspectives, the repercussions of the accompaniment process, conditions conducive to implementing the change, etc.). Evaluations can also be carried out over different time sequences or be made at strategic moments in the accompaniment process

(to take stock or to reaffirm the engagement of the accompanied individuals), an approach suited to actions undertaken in a group, adjustments made over the course of the accompaniment process, directions taken, the addition of new elements, and the planning of future tasks or accompaniment situations.

Accompaniment providers carry out analytical assessments to better prepare their intervention or to help themselves plan the accompaniment process by determining the needs of the accompanied workplace, but also by drawing on concrete experiences and situations from the workplace to enrich the accompaniment process and assist with implementation of the prescribed change. Performing such analysis is also an aid to action continuance and a way to identify followup activities to offer groups by going back over the intervention. It is a time for people to look back on what has been accomplished, while taking a step back from the action. Following such analysis, people are often ready to meet new challenges, take more specific action, make new decisions, and take new action to move toward the intended change.

Analysis enhances staff engagement and responsibility while improving their relationship with the change. By following the progress of the change, accompanied staff do not feel like change is being imposed or forced upon them, even if the change is prescribed and directed. This way of seeing the change facilitates the accompaniment process as people are more able to evaluate losses to be mourned and gains associated with the change, and also the unexpected effects of the change. They can therefore better channel their individual and collective efforts. Given the change's scope or impact, it is often forgotten that, above all else, the goal is to improve a system, organization, work environment, or intervention.

In conclusion, accompanying the implementation of a change presupposes performing evaluations both during and after the action, as much to help with professional progress as to evaluate the change's evolution or impact. This means that the "Use evaluation in the change process" competency must be developed in order to help both accompanied providers and recipients see how practices have evolved and the influence and impact the change has had on the organization, the competency development of accompanied staff, and the clientele served by the staff.

## QUESTIONS FOR REFLECTION Associated with Competency 7

*"Use evaluation in the change process"*

**At the beginning or during the process**

- What does observing how a change has evolved mean?
- How can evaluation practices be used in a change process?
- What role can colleagues play in updating one's professional practices?
- How can self-evaluation, coevaluation, and mutual evaluation be used to spur engagement in a change process?
- How can evaluation practices linked to the change be used in the accompaniment process by adopting a socioconstructivist perspective?
- How can reexamining one's perceptions and beliefs support professional competency development with regard to the use of evaluation practices?

**During or at the end of the process**

- How is it possible to reexamine practices without generating certain forms of resistance?
- What does an observation that raises awareness or leads to adjustments and new practices consist of?
- How does teamwork among colleagues help adjust and fine-tune actions and professional acts?
- How can analysis be facilitated when the change is directed or involves prescriptive elements?

COMPETENCY 8

# Use Professional Judgment, Acting Ethically and Critically

COMPETENCY **8**

## USE PROFESSIONAL JUDGMENT, ACTING ETHICALLY AND CRITICALLY

### PROFESSIONAL ACTS

1. Know one's model of practice and be able to explain it
2. Exercise critical thinking with an open mind
3. Justify decisions and actions
4. Recognize and respect others' values and representations
5. Avoid any form of discrimination, hasty conclusions, or inappropriate words or acts
6. Take a democratic approach
7. Understand the framework of the change, and use it wisely
8. Make connections between professional, critical, and ethical judgment in considering the cognitive, metacognitive, affective, and social domains

**ACTIONS**

### As an Accompaniment Provider

- Be able to explain one's model of practice
- Accept criticism and feedback from others
- Be creative
- Show reflective-interactive autonomy
- Recognize one's attitudes and beliefs
- Understand the role of rational and affective elements
- Take a critical distance to ensure discipline, coherence, and transparency
- Practice modeling by being an example
- Be aware of one's inconsistencies
- Accept uncertainty, tolerate ambiguity
- Take risks
- Respect others by considering their "zone of proximal development"
- Fight stereotypes and prejudice
- Avoid categorization, labeling, unfair generalization
- Take into account the complementarity of accompanied staff

### When Accompanying Others

- Examine problems as a whole, considering their complexity
- Explore different points of view and justify, compare, and reexamine one's own
- Review, validate, confirm, reexamine, and adjust decisions
- Use interaction, reexamination, reflection, and feedback to support the reconstruction or emergence of a new system of values
- Create an open attitude toward diversity
- Identify and implement strategies adapted to the response observed
- Challenge positions, create uncertainty
- Be prepared to explain interpretations

## COMPETENCY 8: CONCEPTUAL BACKGROUND

In actions aimed at developing and evaluating professional competencies, professionals face problems that are complex, unusual, or even new to them entirely. These problems cannot be resolved using tried-and-true techniques or processes. Instead, professionals must draw upon their expertise (experience and training) to seek out solutions worth presenting for discussion and review so that they can be refined, validated, and improved. By its very nature, this approach helps them feel qualified to find solutions appropriate to a given situation. They can adjust their actions and seek feedback from colleagues if necessary.

While professional judgment is already a part of practices in certain fields, it is a concept that requires further examination in a competency evaluation or professional development context. Furthermore, professional judgment is not only used for evaluating what people produce, but also various professional acts that require making decisions regarding, among other things, how to address someone, e.g., to share information about a project; how to justify the approach chosen to promote the development of competencies; how to take advantage of professional experience; how to choose intervention strategies and compare them in a way that explains the objectives pursued and the coherence of the conceptual thread, etc. Evaluating competencies involves making judgments, i.e., deciding on the steps required to complete a project both in terms of assisting with change implementation and recognizing efficiency. In this regard, it takes more to judge competencies or the level of efficiency achieved than a series of isolated judgments. Professional judgment is broader and permeates all professional acts.

One might wonder about the expression "use and develop professional judgment." When professionals in various fields are in a position to make decisions, they are said to be using professional judgment when they make decisions that they are able to justify as required, when they make decisions that reflect the desired intentions and aims, and when they can explain the elements of their expertise (experience and training) used in reaching the decisions. They are said to be developing their professional judgment when they seek to reexamine, validate, confirm, question, or adjust their decisions, etc. In this regard, others inevitably help develop professional judgment. Thus professional judgment becomes more rigorous supported by principles, policies, frameworks, programs, standards, and regulations that serve to guide its use. It can thus be said that professional judgment is exercised alone or with others, but develops

primarily through interaction with others who validate, bear out, or question it in new situations that, over time, can be compared with a set of previously experienced situations.

These considerations lead us to define professional judgment as follows (inspired by Lafortune, 2008a, pp. 27–28).

**Professional judgment**

Professional judgment is a process that leads to decision making. The resulting decision takes into account various considerations derived from a professional's expertise (experience and training). This process demands discipline, consistency, and transparency. Rigorous professional judgment is based on principles, policies, frameworks, programs, standards, and regulations that serve as guideposts. In addition, professionals can justify their decisions when necessary on the basis of the objectives pursued or the aspects of their expertise (experience and training) used to reach the decision. Rigorous professional judgment implies being in a position to reexamine, validate, bear out, question, or adjust past decisions. In this regard, others play a key role in developing professional judgment. To ensure consistency, professional judgment is held up to others so that they may discuss and question it. Professional judgment is exercised alone or with others, but develops primarily through interaction with others who validate, bear out, or questions decisions made in new situations that, over time, can be compared with a set of previously experienced situations. Transparent professional judgment implies clarification of the criteria on which decisions are based and the ability to revisit decisions as necessary.

Using and developing professional judgment implies accepting subjectivity, being aware of one's beliefs and practices, clarifying the decision-making process using appropriate and adequate tools, and justifying the decisions made. This vision of professional judgment requires a form of accompaniment or at least interaction within a team of colleagues. Accompaniment enables the emergence of sociocognitive conflict, which leads to in-depth reflection on one's beliefs and practices regarding the foundations of the change. Accompaniment may even be necessary in order to put a team of colleagues in place that will spur discussion about decisions and reexamination of professional practices.

Even when professional judgment is already part of the practices in place, using it to explain, justify, and argue in favor of certain decisions requires reflection on professional practices and decision-making processes. Such reflection is more likely to engender a change when it is part of a reflective practice (see Competency 2) that encourages professionals to reexamine their judgments, improve the strategies leading to

their judgments, and become aware of the influence of their prejudices or preconceptions. Again, the implication is that professional judgment is better exercised in conjunction with colleagues in order to develop and improve it and to ensure discipline and timeliness.

In using and developing professional judgment, the role of teamwork with colleagues is to

- Question decisions
- Bring prejudice to light
- Create uncertainty
- Ensure fair decisions
- Develop a sense of collegiality

In accompanying the development of professional judgment, it may be useful to have accompanied persons reflect on professional judgment as it exists in their field of expertise and on their role in the institution. To this end, participants in a past experiment in the education field were asked to list what they expected from professionals in general. The responses showed clear ties to evaluation or diagnosis. Other types of decision making emerged more subtly (deciding to take action with people in a particular situation, to inform or consult colleagues, etc.), and ties to teamwork were rarely mentioned. Feedback from others on one's own work was not viewed as essential or necessary, and participants therefore did not automatically think of specific expectations in this regard vis-à-vis other professionals. Three types of expectations emerged: relational (attitudes, openness, listening, respect, etc.), intellectual (discipline, ethical and critical thinking), and professional (reflection, competency, autonomy). The most common type of expectation concerned the professionals' relationships with others. Some work teams even evoked this aspect exclusively. In an accompaniment approach, it would seem important to seek a balance between relational, intellectual, and professional elements. What can be expected of a professional who has the ability to listen and is open-minded but clearly lacks certain required competencies with respect to subject knowledge, for example? In developing professional judgment, it seems important to discuss these expectations in order to understand what is essential, necessary, and useful for each accompanied person.

A discussion on how to recognize when people are using professional judgment showed that such people

- Communicate and explain their thinking
- Accept criticism and feedback from others, and take risks

- Examine problems as a whole, considering their complexity
- Are creative
- Analyze and synthesize information
- Are independent
- Act ethically
- Are engaged in a reflective practice

Consequently it would appear that professional judgment requires training in synthesis, analysis, and critical thinking as well as experiences involving creativity, autonomy, and ethics.

Considering professional judgment today without drawing ties with ethics is somewhat problematic, especially when ethics is understood to involve reflection and a practice rather than a prescriptive approach. According to Gohier (2005), ethics is an art (a combination of knowledge, abilities, and attitudes): knowledge of rules and information, the ability to create and reflect, and the adoption of attitudes of attentiveness to the environment and sensitivity to others in one's way of being and acting. In this regard, an ethical perspective would appear essential to professional judgment. Consequently ethical reflection comprises an element of uncertainty that can be associated with a certain subjectivity in the use of professional judgment. However, this subjectivity can be exercised with discipline, transparency, and consistency if it is well understood, well defined, submitted to colleagues for review, and based on expertise (experience and training) that allows for comparison with similar cases.

## UNDERSTANDING PROFESSIONAL ACTS ASSOCIATED WITH COMPETENCY 8

Using professional judgment while acting ethically and critically presupposes a number of professional acts and actions. The following are the main professional acts and a certain number of actions that provide a clearer understanding of this competency:

- Know one's model of practice and be able to explain it
- Exercise critical thinking with an open mind
- Justify decisions and actions
- Recognize and respect others' values and representations

- Avoid any form of discrimination, hasty conclusions, or inappropriate words or acts in the workplace
- Take a democratic approach
- Understand the framework of the change, and use it wisely
- Make connections between professional, critical, and ethical judgment in considering the cognitive, metacognitive, affective, and social domains

## Know One's Model of Practice and Be Able to Explain It

Using and especially developing professional judgment entails interacting with others in order to explain one's decisions. For these interactions to be a part of the professional development of accompanied persons, it is necessary to know one's own model of practice and be able to explain it. This in-depth knowledge will help reveal which elements of the model arise from professional judgment and will show where professional judgment is used in one's practice, considering that people who use professional judgment

- Communicate and explain their thinking
- Accept criticism and feedback from others, and take risks
- Examine problems as a whole, considering their complexity
- Are creative
- Analyze and synthesize information
- Are independent
- Act ethically
- Are engaged in a reflective practice

## Exercise Critical Thinking with an Open Mind

Among other things, being open to interaction, discussion, plurality, and divergence consists of exploring different points of view and justifying one's own perspective while comparing it to that of others and reexamining it, if necessary. It also means recognizing (being aware of) one's attitudes and beliefs (convictions and conceptions) in order to understand the role of rational and affective elements in one's decision making. Professional judgment includes a critical dimension that allows one to

take a step back, i.e., seek rigor and coherence that one can subsequently explain. Taking a critical distance means asking questions about what influences one's own judgment. Some may wonder whether this is possible without calling on others to clarify one's thoughts, actions, beliefs, and practices (Thagard, 2000). Reflection, analysis, and adjustment in interaction with others would appear to be key to promoting rigor, coherence, and transparency. Developing critical thinking is therefore essential to using professional judgment, as it allows people to "evaluate the issues, consider the facts, assess their accuracy, and put them in perspective relative to their own position. This requires exploring and comparing diverse points of view, developing arguments, and using criteria" (MEQ, 2004, p. 40 [translation]).

## Justify Decisions and Actions

In an accompaniment approach, making decisions is not enough; to be a model for others, accompaniment providers must justify the decisions they make. Exercising one's judgment means making decisions on the basis of the objectives pursued. Developing professional judgment implies being in a position to revisit, validate, bear out, question, and adjust past decisions. In this regard, others play a key role in developing professional judgment. One might say that professional judgment is exercised alone or with others, but develops primarily through interaction with others, who validate, bear out, or question it in new situations that, over time, become comparable to relatively familiar situations.

Justifying one's professional acts consists of reviewing them in order to explain them and arrive at an understanding of what will help develop competencies. It also involves adjusting one's practices to the prescribed change. Many professional acts are intuitive and promote the change, while others can hinder it, although unintentionally. Examining one's practice and analyzing various actions can help show why accompanied persons have been able to build knowledge or develop competencies.

Developing competencies requires being in a situation to act. These situations are complex and fairly new with respect to the accompaniment of change. Accompaniment providers must act as a model (provide an example in action). Being in a situation to act and acting as model requires consistency in thoughts and actions, in beliefs and practices. Maintaining consistency is not always easy and may even be impossible in certain cases. Yet a reflective practice can help people become aware of their inconsistencies—a first step toward greater consistency. Lastly,

providing an example means being in a situation to move toward the prescribed change, accept uncertainty, tolerate ambiguity, and take risks (Vallerand, 2006a, b).

## Recognize and Respect Others' Values and Representations

In an accompaniment situation, people's values always come into play and are not necessarily universal. Values guide people's decisions and practices, and can sometimes give rise to conflict. For this reason it is important to be able to recognize one's own values and those of others. Values are a sort of filter through which decisions are made; they often explain people's affective responses and actions. When values are clear and not imposed, they can help others find their place and identify their own values. Change situations often lead people to question certain individual values that previously guided their professional action. Accompaniment can help shift individual values. The methods used (interaction, reexamination, reflection, etc.) can support the reconstruction or emergence of a new value system.

When people really engage, they sometimes place themselves in a situation of vulnerability; they take certain risks whose consequences it would be wise to consider. Scrupulous respect for accompanied individuals and their ideas and courage is therefore necessary. Accompaniment is built on respect toward others and a relationship of mutual trust that develops over time.

## Avoid Any Form of Discrimination, Hasty Conclusions, or Inappropriate Words or Acts in the Workplace

Avoiding hasty conclusions and judgments that engender negative attitudes requires respect for others and consideration of their "zone of proximal development." Allowing others to be heard and express their beliefs regarding the prescribed change and its implementation provides them with an opportunity for discussing and debating ideas and putting them into perspective. In order to avoid any form of discrimination, hasty conclusions, or inappropriate words or acts with respect to accompanied individuals, one must examine the practices and beliefs (conceptions and convictions) that influence one's attitudes, words, acts, prejudices, and preconceptions. Certain principles can guide such examination:

*Creating an open attitude toward diversity* in oneself and accompanied persons involves accepting and even valuing individuals for their attitudes and abilities, ways of doing things (strategies, approaches), ideas and points of view, as well as their culture or ethnicity. This requires knowledge, competencies, understanding, and respect in order to help accompanied persons find enrichment in diversity.

*Considering differences as an aid to accompaniment* is part of the perspective of accompaniment as a complex process in which accompanied persons have diverse characteristics. In an accompaniment situation, it may be helpful to clarify how accompanied persons define sameness or difference in their practice. Discussing the role of sameness and difference can be an opportunity to look collectively at how new people are welcomed and received in an institution, company, organization, or work team.

*Fighting stereotypes and prejudice in oneself and others* means not only adopting attitudes, words, and acts that show a concern for treating others fairly, but also responding to words or acts that convey prejudice toward certain group members. Fighting these stereotypes is part of a reflective practice. In an accompaniment situation, it is not easy to accept one's own stereotypes and prejudice, let alone share them with others. However, recognizing them is the first step toward fighting them and preventing them from influencing judgments regarding past experiences. Attentive accompaniment can help shed light on the effect of stereotypes and prejudice on evaluation, for example.

*Avoiding categorization, labeling, and unfair generalization* is necessary because learning is a complex process that makes it difficult to assemble accompanied individuals into homogenous groups or subgroups. On the one hand, it is possible to accompany collective reflection on the inclination to imagine "categories" of people (beginners and experienced, those who resist change and those who welcome it, innovators and upholders of tradition, etc.) so as to facilitate intervention. On the other hand, accompaniment can make it easier to recognize the tendency to ascribe certain behaviors, attitudes, or ways of learning to certain types of people. Whether used to encourage reflection on the creation of "categories" or the tendency toward unfair generalization, accompaniment leads people to observe their own perceptions of accompanied persons, talk about them, collectively discuss observations, and better understand the scope of their thoughts, words, and acts.

*Constructing an idea of what it means to accompany a group of individuals* requires examining what it means to "accompany individuals within a group." Ideally, accompaniment providers should be able to think about each person, where they are coming from, and what can help them, while taking notes, observing, etc., in order to best accompany them.

*Being open to reflective practice* means analyzing one's practice by examining one's actions (interventions, approaches, strategies, training), competencies, abilities, knowledge, attitudes, and values in order to understand connections, manifestations, causes, consequences, difficulties, and successes and arrive at a representation of one's practice with a view to coherence. This means not only looking at one's practices, but also agreeing to reexamine and adjust them. Constantly adding new practices to previous ones can lead to the use of too many methods, or methods that are not necessarily complementary or consistent, even though they may seem to be a good idea when considered individually.

*Agreeing to coconstruct as a team of colleagues* implies genuine cooperation and even coresponsibility for the development of professional competencies. The colleague team can play a role with respect to the many ways of applying principles, i.e., by discussing, reexamining, and questioning them, as well as developing and imitating them. Accompanying a colleague team requires a certain degree of "tact" in order to get team members committed to an approach that may give rise to doubts and questioning. One way to do this is to ask whether an individual is capable of complete objectivity and whether a team can help ensure greater objectivity and fairness.

Accompaniment is carried out with a variety of partners. The strength of the ties between these partners influences individual and group development. These ties must be carefully maintained, e.g., by seeking to understand where others are coming from and identifying and implementing adapted strategies and adjusting them according to the response observed. Teamwork presupposes shared responsibility; discussions leading to coordinated or collaborative actions; a pooling of efforts; collective monitoring, adjustment, and decision making; as well as concerted action (Lafortune, 2004d). To this end, it is necessary to develop and maintain mutual trust, even when discussion and comparison (not confrontation) are necessary. This mutual trust is developed through teamwork, through the use of professional judgment that leads team members to

- Question decisions
- Bring prejudice to light

- Create uncertainty
- Develop a sense of collegiality

## Take a Democratic Approach

Decisions must be made responsibly by adopting a democratic approach that takes into account how staff affected by the change complement one another, as well as dimensions such as respect and the desire for collegiality and coherence, which are part of a reflective stance. Taking a democratic approach leads people to make informed decisions that require taking a critical perspective, as well as interaction and discussion with colleagues. These interactions help ensure greater coherence and fairness than when decisions are made by a single person. Such a democratic approach is tied to accompaniment leadership in which the process of influencing people is shared while respecting the roles and functions of the individuals involved in the change.

## Understand the Framework of the Change, and Use It Wisely

In accompanying a group, it is necessary to know the framework that people operate under and must deal with every day based on the assigned roles, tasks, and powers that determine their area of activity. In addition to this knowledge, being prepared to explain how accompanied persons interpret this framework is even more helpful in understanding beliefs and practices, thoughts and actions, responses and questions. This helps ensure that the steps taken will be critically and ethically appropriate.

## Make Connections between Professional, Critical, and Ethical Judgments in Considering the Cognitive, Metacognitive, Affective, and Social Domains

In an accompaniment approach, critical, professional, and ethical judgment are tied together. The critical dimension is part of professional judgment, otherwise how could accompaniment providers ever step back and weigh the pros and cons, qualify their statements, make choices, select certain pieces of information over others, etc.? It helps one cast a critical eye and provides rigor and the ethical perspective that promotes

transparency and accountability. Using professional judgment calls for a reflective stance, consistency between beliefs and practices, and between thoughts and actions, as well as tolerance of uncertainty. Moreover, professional judgment develops through interactions with others and a reflective practice—so that through contact with others and in the course of action people build awareness of their actions and adjust them as they go—as well as experience and the use of judgment. By comparing one's actions and decisions with those of others, one creates an inventory of diverse situations that enrich one's practice and refine one's professional judgment. This inventory requires consideration of the cognitive, metacognitive, affective, and social domains.

In conclusion, "using professional judgment, acting ethically and critically" is part of the perspective that rigorous, coherent professional judgment, exercised transparently, requires both cooperation and consultation with colleagues, as well as certain comparisons (reexaminations that can occur without confrontation). Accepting this perspective leads people to seek the expertise and help of colleagues to make informed decisions that may have a significant impact on the development of accompanied persons and on implementation of the change. In this regard, developing professional judgment promotes reflective-interactive autonomy. This type of autonomy involves interaction rather than working alone to make decisions; it involves accepting feedback from others on one's practices, even questioning them altogether, while remaining accountable for one's professional acts.

## QUESTIONS FOR REFLECTION Associated with Competency 8

*"Use professional judgment, acting ethically and critically"*

**At the beginning or during the process**

- What are the characteristics of a person who uses professional judgment wisely?
- What are the characteristics of professional judgment?
- What are the links between ethics and professional judgment?
- What is the role of a critical perspective in the use of professional judgment?
- What does it mean to show consistency between thoughts and actions? Between beliefs and practices?
- How can one ensure that professional judgment is rigorous, coherent, and transparent?

**During or at the end of the process**

- How can engagement in a reflective practice promote the use of professional judgment?
- How can the ability to explain one's model of practice help a person develop and use professional judgment?
- What factors can influence the use of professional judgment?
- How can one use professional judgment ethically in making certain professional decisions?
- How does teamwork help develop professional judgment?

# AFTERWORD

*Professional Competencies for Accompanying Change: A Frame of Reference* is an invaluable work that explores various ways to approach today's educational environment with a view to fostering change.

People readily agree that our world is changing in countless ways. Whether we hope for or fear some of these changes, our choices are to resist, to endure, or to influence the course of events and their pervasive repercussions. The fact is, all groups and individuals must take the time to reexamine their habits and practices. This is doubly the case for schools, which must change their training objectives with the advent of lifelong learning and which must develop an "improvement culture" in everything they do. Thus in education—in Québec as well as in countless other communities and countries—attempts have been made to respond appropriately to the changing world and to make the updating of practices an evolving tool that can be used to improve services. In the great collective undertaking that was the reform of the Québec educational system, we completely reenvisioned what we hoped to achieve and how we intended to do it, in order to better prepare all students for the challenges of living in a knowledge-based society.

As expectations for change continue to raise the bar higher, our young people need to be given the chance to take an active part in our constantly evolving and ever more complex society. All of our young people need to become skilled at processing information, meeting

challenges, organizing their lives, cooperating, communicating in multiple languages, and utilizing information and communication technologies. Not only must they acquire **knowledge and skills in traditional disciplines**, they must also learn to be lifelong learners, because it must be remembered that much of the knowledge they will need as individuals, citizens, and workers will not be constructed in secondary school, but instead acquired throughout their lives. It is a good thing these learning resources are on the rise, because so are the challenges coming our way.

Since its inception, the Québec educational system has continuously extended its reach. Once concerned only with literacy, it now teaches the arts, the trades, and citizenship. Once a closed shop to all but a few, and for a few short years, it has now made education mandatory for all until age 16 and beyond. We can be proud of all the progress we have made. But today the challenge is even greater than before, because our goal now is to help all students acquire "what were previously felt to be very advanced cognitive competencies and attitudes, beyond the grasp of the masses."[1] As elite athletes know, it is far more difficult to improve a very good performance than to learn the rudiments of a sport. If we want changes in education, it is not because we are not already good; it is because tomorrow we must be even better.

But how can we rise to the challenge? It is seldom enough to simply declare that there will be change, and waiting until it occurs on its own can require a great deal of patience. This is where the change accompaniment concept developed by certain authors can be a real help. Louise Lafortune's work in this regard shows particular promise. It offers a new way to look at on-the-job training as a part of a directed change that leaves ample room for professional initiative.

*Professional Competencies for Accompanying Change: A Frame of Reference* grew out of an accompaniment-research-training project for implementation of the Québec Education Program. Competencies that emerged from the articulation of theory and practice and synergies of accompaniment providers and accompanied individuals led to an accompaniment development framework for those who face major and complex change on a daily basis. It is a concrete example of broad and fruitful collaboration between the research and workplace environments.

1. Organization for Economic Cooperation and Development (2002). *What Schools for the Future?*, Geneva, Center for Educational Research and Innovation, OECD, pp. 71–72.

The professional competencies set out in the frame of reference shed light on the various facets of the attitudes required to effectively accompany individuals seeking to improve their practices. Adeptness as an accompaniment provider develops over time, and the document from Louise Lafortune's team provides insight into the attitudes required. It explains why it is important to embrace change, self-analyze, accept the opinions of others, tolerate ambiguity, and view learning and respect for others in a new light.

The eight competencies detailed in this frame of reference illustrate the various dimensions to consider in the accompaniment process. How does one deal on a timely basis with the complexity of new accompaniment situations? How can one engage in a reflective practice? How can casting a critical eye on problems help identify possible solutions? These are the kinds of questions that the frame of reference attempts to answer. It prompts us to take a close look at the individual and what he or she is, as well as at the engagement process that equips the individual to formulate an accurate vision of the workplace, structure his or her professional identity, and develop his or her ability to act, the very goals of the Québec Education Program.

The interaction of theory and practice is the foundation of a continuous training culture, which is essential for informed change. Participants in the accompaniment-research-training project experienced as much. Writing the frame of reference for professional competencies for accompanying change afforded them the opportunity to gain greater exposure for their observations. In reflecting, analyzing, and putting their professional actions and acts into words, they have produced a genuine frame of reference that will assist those who undertake accompaniment of individuals facing the challenge of changing their orientations or concerned about directed change. To be positive, accompaniment for updating practices must be planned with rigor, flexibility, and skill; this is why it is important to be trained in this type of accompaniment, which cannot be improvised, and which assumes that specific competencies have been developed. And that is where this book will make an significant contribution.

It is my hope that the impetus Louise Lafortune and her team have provided this dynamic for change will resonate in the evolution of pedagogical and organizational practices throughout the education system. Accompaniment—of accompaniment providers, administrators, teaching staff, support personnel, and even students in the development of

competencies and acquisition of integrated knowledge, as the Québec Education Program has recommended—should serve to accelerate a process that is already under way.

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# GLOSSARY

This glossary is intended as a form of dictionary to provide explanations for concepts and expressions used in the education community and other fields where change involves accompaniment. It covers concepts and expressions that have been developed or used in a particular way as part of a accompaniment-research-training project related to changes in education. These concepts and expressions serve as benchmarks used by a group of people to describe, situate, and circumscribe change and better understand the requirements for accompanying change within an organization. This glossary contributes to the development of a shared vision of change. It is largely based on the following works: *Compétences professionnelles à l'accompagnement d'un changement. Un référentiel* (Lafortune, 2008a); and *Un Modèle d'accompagnement professionnel d'un changement. Pour un leadership novateur* (Lafortune, 2008b).

**Accompaniment**

Accompaniment is a form of support based on a process of professionalization. It assumes consistency between the work of accompaniment providers and the goals set for them in the accompaniment process. The process involves a form of modeling that uses a working example transferable into a workplace or group accompaniment situation. It is designed for those implementing changes that demand modifications to professional practice, with all the questions, apprehensions, uncertainties, ambiguities, and risk-taking that this entails. It requires reflective-interactive practice on the part of the accompaniment providers and those being accompanied.

Accompaniment is conducted in collaboration with workplace communities and groups that chart their own course with respect to their need for help in navigating a change. These choices are the result of collective decisions made

on the basis of resources, staff expertise, existing workplace practices, and the aims and intentions of the change. The accompanied persons transfer the accompaniment model by adapting the approach to their particular situation. To do so, they are encouraged to document their process of accompaniment and the experiments conducted in their workplace. This makes it possible to track the progress of the accompanied persons and groups and understand their approach. Accompaniment also implies collegiality that may develop into professional collaboration over time (for further explanation, see Lafortune, 2008a).

**Accompaniment leadership**

Accompaniment leadership is a process that orients professional practices by providing direction for change. It is exercised and developed through individual and group reflection and through interaction with personnel affected by a change. Leadership of this kind builds awareness and leads to initiatives that are developed, carried out, analyzed, evaluated, adjusted, and revisited in a spirit of professional collaboration. This process is part of reflective practice where reflection and practice analysis paves the way for the development of models of practice and professional competencies for accompaniment.

Normally, accompaniment leadership influences the level of staff engagement and encourages steps to translate commitment to the change into concrete actions or into action and accompaniment plans. Such leadership fosters innovation and initiative, but also presupposes a certain form of collegiality and the sharing of power and responsibility with accompanied staff. This type of leadership cannot be imposed. It is recognizable through its achievements, the relationship the leader maintains with the work team or staff at the organization or business involved, the trust he or she inspires, and so on.

In a context of prescribed change that sets a direction, it is a matter of fostering not just commitment, but engagement. The accompaniment process for such a change can foster openness, skepticism, questioning, or rejection (Lafortune 2006). It involves interaction, collective reflections, actions, collective analyses, and regulations. Accompaniment leaders share various characteristics, including a certain culture, ethical behavior, an ability to take the affective dimension into account, and a commitment to reflective practice (for further explanation, see Lafortune, 2008a).

**Accompaniment process**

The accompaniment process is a dynamic process that fosters action and leads to change. It involves a set of professional acts with defined aims that are planned and structured from a socioconstructivist perspective on the basis of a partnership with a specific group. The process includes strategies for leading discussions, training, and accompaniment and draws on various tools (self-questioning, interaction, coconstruction, reflection, analysis, modeling, etc.). It is an assistance, support, and mediation measure designed to help individuals within a group to move forward and develop professional autonomy while taking into consideration the cognitive, metacognitive, affective, and social dimensions.

From a content perspective, accompaniment combines theory with practice, and reflection with action in an integrated, complementary manner. Implementation of this process calls for a culture that manifests itself in attitudes, knowledge,

strategies, abilities, and experience, but also through the development and exercise of professional competencies associated with accompaniment leadership. By its duration and continuous nature, the process encourages change and helps ensure that its foundations, aims, and content are integrated in a durable way. More generally, it fosters interrelated initiatives for training a workplace community through mutual aid, collaboration, and communication (also see Lafortune and Deaudelin, 2001; Lafortune and Martin, 2004).

**Action initiation**

Action initiation is the moment chosen by an individual or group to initiate actions, professional acts, or accompaniment situations to facilitate a change. It is a crucial and often difficult phase because change, especially significant change, forces people to adjust their models of intervention. These adjustments vary in scope depending on the accompanied individuals or groups and their position with respect to the change. Action initiation is essential for ensuring the updating and long-term viability of practices associated with the theoretical foundations of a change. Two phases can drive action initiation: 1) change-related narratives of practices and experiences that generate reflective-interactive feedback, and serve as a window on workplace practices, providing inspiration and an opportunity to learn about giving feedback on other experiences; 2) subgroup accompaniment of action plans developed and led by accompanied persons. These phases encourage people to initiate actions and experiments facilitating a change or to support the change accompaniment process.

Action initiation presupposes (a) a team-designed and planned project; (b) experimentation and action; (c) monitoring; (d) individual and group analysis; (e) adjustments, and; (f) evidence keeping.

**Action plan**

An action plan can take the shape of an intervention sequence, plans to carry out various professional acts, or a structure suggesting actions to implement as part of a change accompaniment process. Action plan implementation helps facilitate change, the updating of professional practices, and the development of professional competencies. These action plans presuppose a close link between the planning, predicting, design, development, implementation, and evaluation of a set of tasks, at the same time taking into account the knowledge culture in the field and the accompanied workplace. These plans are reflective actions comprised of a series of professional acts, actions, and means that foster collegial effort to implement a change. Accompaniment providers put in place a complex reflective-interactive mechanism that encourages accompanied individuals to gradually engage in the change. This is achieved through interaction, using socioconstructivist accompaniment tasks and situations. People manifest their desire or intention to change or learn by engaging in the accompaniment process; initiating action by planning and developing action and accompaniment plans; conducting experiments in their workplace; and revisiting the process, means, and tools used to develop competencies among the people being accompanied.

Successfully implementing a change involves taking action and putting in place action plans that require thorough preparation and offer realistic opportunities for adaptation, given the learning paths of accompanied staff. By structuring

action plans to accompany the change, accompaniment providers develop a long term vision to support those being accompanied. In doing so, they ask how their plans will support people working to develop new professional practices, or how they will foster buy-in to the change.

Plan development helps mobilize change-inclined resources and knowledge culture. It provides support, followup, and continuity, and promotes the reinvestment of learning. During the planning process, accompaniment providers take advantage of their collective competencies by working with their colleagues. Together, they set priorities and choose actions, strategies, and means for the change. These action plans are structured for consistency with the foundations, aims, and intentions of the change. In the course of planning, accompaniment providers question the object (the what) of their intervention and how they plan to achieve it. Together they explore and discuss their actions and practices with a view to analysis, reexaminaton, and regulation. They critically examine the means and actions implemented to develop and exercise their accompaniment leadership. The action plan is generally spread over a number of meetings that include training aspects (theory and practice) and followups. A plan like this has several components: a conceptual thread, intentions, actions and justifications, predicting, possible adjustments, reflection, and mechanisms for evidence keeping (for further explanation, see Lafortune, 2008a).

### Coconstruction

Coconstruction is a process that enables individuals to construct new representations from existing ones by comparing and contrasting their views with those of other people involved in the process, in a spirit of discussion and sharing. Knowledge of a change is constructed based on one's own model of practice, which, in the course of the accompaniment process, is subject to successive adjustments as new learning occurs or as the person progresses through the change process, during which new learning also occurs. In the course of socioconstructivist accompaniment, participants compare and contrast their constructions with those of others involved in a similar process. Likewise, they validate their constructions against the literature and existing theoretical models. Individual constructions are thus forged as they are challenged and called into question by various influences. Collective construction of a model of practice for a change helps build a shared vision of the change. Staff take ownership of this collective construction and integrate it into their own model as they continue challenging and testing it in everyday work situations. In the course of this complex process, there is constant back-and-forth movement between theory and practice as staff members share and discuss their representations with others, drawing on individual and collective expertise within the group before starting a new cycle with other persons or groups (adapted from Lafortune, 2004d,e; Lafortune and Deaudelin, 2001a. For further explanation, see Lafortune, 2008a,b).

### Cofacilitation

Cofacilitation is a form of professional collaboration associated with socioconstructivist accompaniment. It serves as a "safety net" for accompaniment providers, affording them support from one or more colleagues. Providers not only benefit from mutual support, but also from the input their colleagues can provide. Multiple interactions (information sharing, discussion, etc.) about ideas,

actions, and strategies foster better analysis and provide critical distance that helps clarify choices and improve decision making. Cofacilitation encourages the sharing of theoretical foundations that enrich the respective knowledge cultures of the partners involved. It injects an element of dynamism into their work by allowing individuals to contribute to the construction, justification, and consolidation of their intervention models, and gain a conscious awareness of their beliefs about teamwork and about accompaniment in general. It also helps ensure monitoring and continuity in the event of a team member's departure (for further explanation, see Lafortune, 2008b).

**Competencies in development**

A competency in development is one whose development is ongoing. Competency development is a lifelong endeavor. Regardless of age, knowledge, abilities, or experience, people try to achieve greater mastery every time they use a competency in a new and different situation. This idea of a competency in development is rooted in the impossibility of identifying all situations where a competency may be required. On the other hand, individuals can make correct and appropriate use of certain aspects of a competency, in which case they are deemed to have achieved a degree of mastery. In order to fully appreciate the dynamic aspect of this process, it is appropriate to talk about developing competencies. A competency is developing when progress is achieved towards mastering its components, and when use of those components grows more complex in response to the unforeseeable needs of the situation.

Competency development involves drawing on knowledge and existing abilities that are not fully mastered. If these features are relatively mastered, this means that individuals are at the stage of using the competency to secure their mastery. Use of a competency can be defined as the application of constructed knowledge and "mastered" abilities that enable one to perform a task or produce something, whereas competency development refers to the notion of progress toward full mastery of a skill. When change is implemented, the people affected strive to incorporate new skills and explore new ground, which is why it is more difficult to develop competencies than to use them. In a context where competency development is an ongoing, open-ended process, use of a competency has to do with the level of mastery, and the user's awareness of his or her strengths and weaknesses with respect to the competency. Competency development is stimulated by cognitive dissonance and difficulties that instill doubt, raise questions, and encourage experimentation. It is an action-based process and leads to autonomy (Lafortune, 2004d,e).

**Conceptual thread**

The conceptual thread explicitly clarifies the spirit of the accompaniment process or action plan. It is used to guide reflections and actions, establish links between the ideas set forth and the actions taken, and revisit these actions to articulate the meaning, connections, and cohesiveness of the accompaniment process (Lafortune, 2004e). It allows participants to reexamine the ground covered (individually and collectively) by explicitly identifying the subjects and processes experimented with during the accompaniment process. It helps reframe, adjust, and regulate actions and the process. Contextualization of the conceptual thread that ran through meetings over the course of a year helps foster awareness of

the progress made, and establish links between past and future action by facilitating planning. The conceptual thread helps clarify the meaning of actions, ensure consistency in the accompaniment process, and appreciate how consistency was achieved. It also opens up new avenues for reflection and action, and can even revitalize the reflection/action process (for further explanation, see Lafortune, 2008a).

### Emergent theory building

"Emergent theory building is a process whereby theoretical discoveries are made based primarily on the action that a studied community takes as part of its own study. The community actively helps researchers achieve greater understanding at the same time that it comes to a better understanding of itself. It can suggest a problem, reorient research and intervention to a more productive path, and critique or validate research results. Emergent theory building is the product of interaction and of the coconstructions created by individuals from the community and the research team. It is a means to coconstruct theory for new concepts ... because it draws on material constructed in a group setting and returns it to the group for dissection and improvement, while also drawing on existing theories." (Lafortune, 2004d, pp. 297-298 [translation].)

During the accompaniment process, people reflect on change, gain new awareness, establish links, and make observations. Some of their new findings may lead to theorizing, because they bear witness to the experience underway. But this information must first be collected as evidence and kept for subsequent examination and comparison. It must be analyzed, interpreted, and validated before any theoretical statements (definition of concepts associated with change or the accompaniment of change) can be formulated or any experiential models (professional accompaniment model for change) or models of practice can be built (Lafortune 2008a).

### Engagement

Guillemette (2006) defines engagement as a willing, voluntary, conscious, and deliberate personal investment, or as a profound attachment. Engagement demonstrates the importance that an individual accords to a goal or person with whom he or she has ties, and guarantees the completion of tasks the individual has undertaken. Kiesler (1971) also associates engagement with tasks, likening it to "the tie that binds an individual to the acts that he consciously, freely, and willingly carries out. According to the author, acts alone commit individuals" .... (Kiesler, 1971, cited in Pirot and De Ketele, 2000, pp. 368–369 [translation]).

In accompanying change, engagement also refers to action, because initiating action is vital to implementing change. However, engagement may also involve preparing for action; an individual can be engaged without actually taking action. In an accompaniment process, not everyone takes action at the same time. An individual may claim to be committed to a change, but the level of commitment will determine whether action ensues or not. For some people, action may take longer. Conversely, other actions can be carried out in the absence of true commitment. Nonetheless, the accompaniment model helps the accompanied individuals realize the importance of action in moving the change process forward.

In other words, engagement manifests itself in observable professional acts. Individuals show their commitment through their actions, even in situations that are not always conducive or favorable to implementing change.

"Being engaged" can also mean being subject to constraint; this is known as obligation or locked-in engagement (Jaros *et al.*, 1993; Johnson, 1995). This type of engagement may exist simply because the envisaged change is considered impossible. In such cases, individuals remain engaged because they feel that they have no other choice (Adams, 1999; Becker, 1964; Gérard, 1965; Levinger, 1999). Self-engagement, on the other hand, assumes both freedom *and* constraint (Strauss, 1992), and the belief that the situation does not depend solely on structural constraints, but on oneself as an individual and on one's choices and actions (Nadot, 1998). An individual may "be engaged" without having actively made a commitment, or without having done so consciously or voluntarily (Becker, 1964; Lawler and Yoon, 1993; Leik *et al.*, 1999; Strauss, 1992). In other words, the state of being engaged (or the engagement state) may be the result of an obligation engagement (Guillemette (2006, pp. 18–21).

Engagement can also be qualified as a dynamic and open-ended process that takes different dimensions of engagement (affective, cognitive, metacognitive, and social) into account. These dimensions are part of a socioconstructivist perspective that tends to portray engagement as something that develops and transforms itself depending on the interactions that people have in their workplace. However, there is a distinction to be made between the concept of engagement (willing, voluntary, conscious, and deliberate personal investment or profound attachment) and the concept of engagement in a context of significant and prescribed change (questioning, reflecting on practices, taking initiative and action). Consequently, engagement takes on different meanings depending on the context.

Only individuals have the power to define and commit to their engagement, which is why we often talk about self-engagement. "[T]he self is both subject and object of the action; it is a matter of engaging oneself by oneself. Actions with this characteristic—i.e., whose subject and object are the same—can be termed autonomous" (Guillemette, 2006, p. 17 [translation]). Manifestations of engagement can be observed in an individual's attitudes and actions. From a socioconstructivist accompaniment perspective, intrinsic commitment is a way to express one's freedom and implies voluntary choice. By observing people's attitudes and actions, it is possible to determine, interpret, and qualify the commitment they have made. In the case of an accompaniment model for change, self-engaging means adopting a professional development posture. The models seek to foster a level of engagement among the persons being accompanied so that they will act in a way that facilitates a change within their organization. Though their actions, they alone can define, bear witness to, and be accountable for their engagement, consciously or not. One characteristic of a committed individual may be to take initiative and action above and beyond what is required. Individuals who act this way show that they like and believe in what they do, and enjoy doing it. They take an interest in their profession and the professional acts they perform allow them to achieve personal and professional fulfillment. They are proactive, perseverant, and have a sense of responsibility. They seek to understand or pursue actions undertaken in a particular situation, and contribute to them in a manner consistent with their own values and beliefs.

Engagement can also refer to interest in individual or group actions to undertake. Depending on the level of interest in the change being implemented, commitment can range from "rather low" to "very high." If commitment is high, barriers to change rapidly disappear and solutions are readily identified. If it is low, barriers easily lead to withdrawal, discouragement, and weaker commitment to finding a solution (Lafortune, Mongeau, Daniel and Pallascio, 2000). There are different types of engagement, including professional engagement; relational engagement; voluntary, cognitive, and reflective engagement; and more (for further explanation, see Lafortune, 2008).

**Enrichment of the knowledge culture**

Enrichment of the knowledge culture is the introduction or development of new knowledge, practices, concepts, topics, competencies, and strategies in a specific field and workplace that helps provide the accompaniment and training necessary to understand the foundations of a change. It encourages an informed reading of change by providing a credibly argued vision for both those interested in understanding the change and those who resist it. It is not a matter of "converting" or "indoctrinating" the persons being accompanied. Instead, the goal is to provide tools that encourage them to think about the goals, scope, and underlying foundations of the change in order to nourish their reflections and, ideally, encourage them to understand and gradually accept the change.

Implementation of a major prescribed change enriches the knowledge culture, thereby helping participants understand the foundations of the change and acquire the necessary autonomy to adapt their professional practices or model of practice. In a changing world, enhancing the professional knowledge culture is associated with professional development and the successive regulation of professional practices. To be or become an accompaniment provider, it is vital to enrich one's knowledge culture: it helps accompanied persons see the relationships between theory and practice.

Developing a knowledge culture in the field affected by the change helps ensure that the accompaniment approach is consistent, relevant, and theoretically grounded. However, there are questions as to the scope and depth of this culture. According to Lafortune and Martin (2004), it is not just a body of knowledge. It is a set of attitudes, knowledge, strategies, abilities, competencies, and experiences that allowed those being accompanied to develop their critical judgment, creativity, critical distance, and self-assurance. It is an active culture in the sense that accompaniment providers draw upon their own resources and examples in the accompaniment process. This assumes a link between the proposed actions and the theoretical rationale put forward (adapted from Lafortune and Martin, 2004; for further explanation, see Lafortune, 2008a,b).

**Evaluation in accompanying change**

Evaluation is a complex process that consists of examining and critically reflecting on the renewal of professional practices put in motion by a change in an organization, and the extent to which that change is successfully implemented. It involves judging one's progress in the change process, as well as the progress of accompanied staff. Evaluation performs a helping and supporting function in

the process of accompanying change. It is used with an eye to fostering progress and professional development, taking into account the prescriptive aspects and guidelines for the change being implemented.

Evaluation is carried out using data collected from accompanied staff in accordance with explicit criteria. Once analyzed and interpreted, the data is discussed with the staff, enabling them to measure and validate the progress of the change or the development of their accompaniment skills. From this perspective, evaluation practices help guide the choice of future actions and determine which measures are necessary for further progress in the change process. In the socio-constructivist approach to accompanying change, evaluation is reflective and interactive, i.e., it makes ample room for the reflections, contributions, and involvement of staff by taking their ideas, values, viewpoints, and professional expertise into account. Evaluation also helps in assessing, analyzing, and understanding the extent to which change has been implemented by determining what has actually been done, the time required to do it, and the level of staff autonomy in the change process (for further explanation, see Lafortune, 2008a).

**Evidence keeping**

Evidence keeping is a useful means of systematically collecting information to keep track of the path or progress of those on the inside of the change accompaniment process. It uses tools like questionnaires, information sheets, moments of reflection, syntheses, coconstruction, recordings, accompaniment journals, etc. Evidence keeping encourages reflection as well as the analysis of existing professional practices and practices associated with change. Evidence is also useful for reviewing learning outcomes from the process and for evaluation purposes. When developing action plans, the accompaniment provider determines which types of evidence should be preserved and how the information should be collected and used. Evidence provides benchmarks for the accompaniment process and can be revisited at different times along the way. It is used as a starting point, and for predicting, revisiting, reviewing, monitoring, and evaluating; it helps us understand the evolution of the process, identify its strengths and weaknesses, measure progress, retrace steps taken, summarize the process, and establish ties between meetings. It facilitates regulation and adjustment and helps improve the accompaniment process (for further explanation, see Lafortune, 2008b).

**Feedback**

For Wlodkowski and Ginsberg (1995), feedback is information provided to learners about the quality of their work. It is probably the best way to influence competency acquisition on the part of learners, because it encourages them to reframe, challenge, or regulate their knowledge in the aim of change, advancement, evolution, or explanation. Its goal is to inform rather than control, while at the same time promoting efficiency, creativity, and autonomy among staff. Feedback appears to affect the motivation of learners, because it allows them to evaluate their progress better, understand their performance, sustain their efforts, and receive encouragement (Wlodkowski and Ginsberg, 1995).

In the accompaniment process, feedback can serve as a springboard for discussing and analyzing a situation, communicating information, or taking stock. It can be limited in scope to specific information destined for a single

person, or refer more broadly to reflections, comparisons, or new awareness that spur a group to reframe, challenge, or regulate practices in the aim of change, advancement, evolution, or explanation. The type of feedback most widely used in the accompaniment process occupies a continuum ranging from minimally to highly reflective, i.e., feedback that promotes diverse levels of reflection. "In reflective-interactive feedback ... the degree of reflectivity and reflective interactivity may vary. Non- or minimally reflective-interactive feedback supplies information about actions, productions, attitudes, or behavior in the form of commentary, evaluation, or suggested solutions for a given situation. Feedback at the reflective-interactive end of the continuum encourages feedback recipients to reflect on their actions, productions, attitudes, or behaviors and to envisage and discuss solutions" (Lafortune 2004d, p. 296-297 [translation]).

Using feedback in the context of a prescribed change is a challenge for accompaniment providers, since not all experiments and ideas will be appropriate for the change to be implemented. Giving feedback in a change context means keeping the following goals in mind: (1) situating the theoretical foundations of the change; (2) ensuring that all aspects of the feedback are consistent; 3) agreeing to take a critical view that involves challenging ideas and practices; 4) taking into account the affective dimension while also considering the change and the professional relationship in question. Accompaniment providers who act as guides learn to recognize the strengths and weaknesses of proposed actions and to support individuals as they evolve in their roles and develop their competencies. Feedback can be facilitated with strategies such as the following: (1) identify key words when listening to people present experiments and proposals; (2) build on the words or expressions they use; (3) ask questions in a way that engages the entire group, avoiding asides and two-way dialog; (4) limit the amount of time people can take to describe their experiences (for further explanation, see Lafortune, 2008a,b).

### Interaction

Interaction is characterized by reciprocal actions between individuals affected by a change and the steps they take to move the change process forward. Interaction spurs discussion, sharing, debate, and the comparison of ideas and practices. Regardless of staff members' roles or status within an organization, it is through interaction with each other that they eventually build a vision of the change to be implemented. Interaction fosters coconstruction, which is why it is important to emphasize the quality, frequency, and diversity of interactions. It also encourages individual and group questioning, awareness building, adjustment, regulation, analysis, evaluation, and observation. Interaction can help staff move forward in adopting change and in updating their professional practices, or in adapting their models of practice (for further explanation, see Lafortune, 2008a,b).

### Model building

Model building is a conceptual process used to develop models of professional practice that can subsequently be adjusted or modified on the basis of a person's knowledge culture or professional experience. In engaging in a process of change, those accompanied continuously transform and adapt their models of practice. In some respects, the models serve them as a starting point (previous knowledge)

from which to approach change as they seek to understand it and take ownership thereof. Based on existing models or elements derived from existing models, accompaniment providers and those they accompany reach different conclusions about their respective professional practices. The connections they make between these observations and the professional acts they perform help them identify a model of practice (adapted from Lafortune and Deaudelin, 2001, Lafortune,2005a,b). Moving from the description of practices to analysis and model building is a challenge that requires reflective practice. At the start of the accompaniment process, it is hard for personnel to conceive of modeling their practices, let alone representing them clearly. Nor do they necessarily see the usefulness of doing so, often considering it a waste of time. Accompaniment providers can facilitate the task, both for themselves and those they accompany, by providing moments of reflection, doing feedback in readily understandable language, and regularly summing up progress in the course of the process (for further explanation, see Lafortune, 2008b).

**Model of practice**

In education, the model of practice represents in a way the education professional's vision of teaching, learning, and evaluation. In other fields, the model of practice is the vision that professionals develop of their work and of the main duties and acts they perform. When accompanying a change processes incorporating prescriptive elements, the model of practice not only includes the way the accompaniment process is represented, but also the theoretical foundations, aims, and intentions of the change that have been, or are being, incorporated by accompaniment providers into their models of practice. The model guides the decisions they make and the professional acts they perform when accompanying people. In developing models of practice for accompanying change, they organize the representations, values, attitudes, and knowledge that will guide their professional conduct. They organize their model based on theoretical knowledge, but also on their own expertise (training and experience), the difficulties faced during accompaniment, and the analysis they are able to perform as a result (Cohen-Azria, Daunay, Delcambre and Lahanier-Reuter, 2007).

**Modeling**

Modeling means being an example rather than giving examples (Lafortune and St-Pierre, 1996). It consists of providing an example in action and acting in a manner consistent with that example, modeling the behavior one seeks to obtain through the accompaniment process in the accompanied workplace and in everyday professional acts and gestures. Persons being accompanied observe the behavior of accompaniment providers. And providers implement their model of practice—in word and deed—through the way they intervene and use themselves as examples in action. By verbalizing their process in action (reflections, doubts, strategies, adjustments) or pointing out certain acts to those they accompany, accompaniment providers are "modeling." They think aloud, ask themselves questions, announce their intentions, and justify their decisions or choices. They make their strategies visible to help foster understanding, but also to encourage other people to use them in their workplace. In addition, they help accompanied persons see how these strategies can be transferred to new accompaniment situations or used with other staff affected by a change (Raynal and Rieunnier, 1997).

Modeling, therefore, is more like a demonstration of a process in action than a step-by-step procedure. For accompaniment providers, this means remaining open to changing their practices and showing they use reflective practices themselves. Modeling of this kind requires an ability to self-question, self-evaluate, and self-observe, as well as an ability to get accompanied persons to do the same. Asking others to change or reexamine their practices without showing a reciprocal willingness to do so oneself can lead to frustration and mistrust on the part of the persons being accompanied. Modeling can be a powerful tool for developing competencies used to implement change and update practices. It is a way to demonstrate coherence between thoughts and actions, and beliefs and practices. This coherence is vital for training, accompaniment, credibility, and engagement.

Ideally, model building (see glossary entry for this term) should precede modeling, because in order to "use oneself as an example," it is best to have built a model of practice ahead of time, to be in the midst of doing so, or to have integrated at least some of the attendant professional acts by developing the appropriate competencies and knowledge culture. In reality, not all accompaniment providers have clearly defined models of practice. This can cause confusion and misunderstanding, because there may be inconsistencies or gaps between what someone thinks, what they say, and what they do by way of an example. Thanks to its reflective-interactive perspective, the accompaniment approach encourages the construction and fine-tuning of models of practice in action. By comparing and contrasting ideas, the persons being accompanied gain newfound awareness of the difference between their words and their professional acts. They can then evaluate what can be done to strengthen the links between their thoughts, words, and actions. By seeking to understand the model of practice of the accompaniment provider who is helping bring about a change, the group acts like a reflective mirror (for further explanation, see Lafortune, 2008a,b).

### Moment of reflection

Moments of reflection are periods used to activate prior knowledge, experiences, and competencies, integrate learning, and help people reflect on various aspects of change and its accompaniment. They are vital to awareness-building, the change integration process, and the development of professional competencies used in accompaniment. Moments of reflection require comfort with silence. Accepting silence and making space for it helps create moments conducive to reflection and to the emergence and exploration of new ideas. Considered responses are often more nuanced, because the underlying ideas have been pondered, weighed, and assessed before being shared with others. Encouraging people to take time to think and actively seek answers fosters reflection and helps them integrate and take ownership of a change in a way that strengthens their autonomy. Moments of reflection are necessary, but are made more meaningful if they are explained, and if participants can share what they understand with others (for further explanation, see Lafortune, 2008a,b).

### Predicting

Predicting is a process used to anticipate certain reactions by trying to understand their underlying rationale and the consequences they may have, not only on individuals and groups, but also on the progress of change. This process is used during the intervention planning phase. For example, when drafting questions,

accompaniment providers will anticipate certain answers. This helps them validate the questions and develop subquestions that can be used to spur further reflection and discussion during the accompaniment process. By attempting to answer their own questions, accompaniment providers can also assess the difficulty, clarity, and accuracy of the questions. Predicting can also be applied to tasks that are to be performed, theoretical content to be presented, or the way accompaniment is carried out. The idea is not to influence outcomes, but to ensure sufficient clarity for productive reflection. Predicting promotes adjustments both before and during the process. The accuracy of predictions can be reviewed and validated so that adjustments can be made for future action (for further explanation, see Lafortune, 2008b)

**Professional collaboration**

Professional collaboration is the pooling of professional activities to carry out a project or achieve a goal associated with a group or community of practice. It involves cooperation, consultation, and coordination of collective initiatives as well as discussions that lead to group decision making and concerted action. Actions are regularly analyzed and adjusted at the group level in order to share responsibility for implementing change among team members. This form of collaboration is termed "professional collaboration" because it takes into account the viewpoints that colleagues bring to bear on various practices, discussing them and even questioning them, in a climate of mutual respect and trust. This can imply a certain degree of "professional intimacy." Collaboration not only requires that people know their colleagues and partners, but most importantly that they believe in the potential for collaboration. Individuals can contribute to implementing change in accordance with their expertise, field of specialty, duties, and analysis of change. Successful change depends on the mobilization and commitment of all those concerned to ensure cohesion and consistency (for further explanation, see Lafortune, 2008a).

**Professional judgment**

Professional judgment is a process that leads to decision making. The resulting decision takes into account various considerations derived from a professional's expertise (experience and training). This process demands discipline, consistency, and transparency. Rigorous professional judgment is based on principles, policies, frameworks, programs, standards, and regulations that serve as guideposts. When necessary, professionals will justify their decisions on the basis of the objectives pursued or the aspects of their expertise used to reach the decision. Rigorous professional judgment implies being in position to validate and bear out, or review and adjust past decisions.

Faced with a decision, individuals exercise their professional judgment. They exercise it alone, but develop it in a team setting by taking advantage of the insights and expertise of their peers, who validate, endorse, or challenge decisions made in response to new situations by comparing them with situations from their own past experiences. Professional judgment is also used in evaluating and developing professional competencies or in other situations where staff deal with problems that are complex, unusual, or new to them entirely. Situations like these cannot be resolved using tried and true techniques or processes. Instead, professionals must draw upon their expertise to seek out solutions worth presenting

for discussion and review so that they can be refined, validated, and improved. By its very nature, this approach strengthens professional judgment and helps them feel qualified to find solutions appropriate to a given situation. They can adjust their actions, referring to input from their colleagues if necessary. Furthermore, transparency in professional judgment assumes the existence of clearly defined criteria and the possibility of reviewing and updating decisions if necessary (Lafortune, 2008a).

**Prescribed change aimed at updating professional practices**

Prescribed change aimed at updating professional practices is a goal-oriented proposal to modify the way in which certain professional practices are performed. Such change must be solidly grounded to ensure consistency and help foster respect for the proposed changes among those affected. The idea of prescribed change implies a certain obligation. At the same time, flexibility is required when working with people considered as professionals, even though a certain amount of rigor is necessary. This is the opposite of rigidity, which is why it is vital to accompany prescribed change (for further explanation, see Lafortune, 2008a).

**Questioning**

Questioning consists of asking a series of questions in a way that encourages expression, dialogue, sharing, reflection, cognitive conflict, reassessment, etc. It is reflective if it leads participants to reflect on their professional practices or think about the strategies and processes used to perform tasks or professional acts. It is socioconstructivist if it fosters knowledge- or competency-building, elicits interaction, or provokes sociocognitive conflict (adapted from Lafortune, Martin and Doudin, 2004). It encourages people being accompanied to verbalize what they think, what they do, how they do it, how they could do it differently, and how they could help promote new awareness or encourage action on the part of their accompanied peers. Questioning can also lead them to take a closer look at the process of accompanying change, and to transfer their experiences into their own accompaniment practice.

In reflective practice, questioning encourages people to speak out and helps foster greater awareness about their practices, questioning them without eliciting undue resistance and without forcing blanket acceptance of change. From this standpoint, people use questioning to promote reflection, thereby creating dissonance that helps call accepted wisdom into question. Questioning represents a real challenge, given its role and usefulness in eliciting in-depth reflections, fostering sociocognitive conflict, stimulating interaction, and leading accompaniment providers and those they accompany to a new state where they reflect on their newfound awareness and their progress toward reflective-interactive autonomy. Upon achieving this type of practical autonomy, people can prepare and revisit their own interventions by calling them into question or consulting others with a view to fine-tuning their practices and reexamining their approaches (Lafortune, Martin and Doudin, 2004, p. 15).

In accompanying reflective practice, questioning calls for the preparation of questions, but also reflection as to their value by anticipating possible responses and subjecting the questions to the critical eye of colleagues before using them. Another possible step is to examine the types of questions asked and assess the

level of reflection they demand in order to reformulate them to elicit even more reflective engagement. Depending on its relevance, questioning is more likely to foster reflective engagement if it elicits new awareness that fuels reflection and leads to action.

Questioning can be a way to elicit reflective practice. In this sense, "questioning linked to an accompaniment process is closely related to the feedback provided about the planning and conduct of the intervention, and *a posteriori* analysis of the action. Be it in the form of comments, information, stock taking, or questioning, this feedback may have broader significance and foster reflection, comparison, or new awareness that requires a reframing, reexamination, or regulation for the purpose of change, advancement, evolution, or explanation. The feedback becomes reflective and interactive if it leads the persons being accompanied to reflect on their actions, productions, attitudes, or behaviors and to envisage a solution that they can discuss with others in order to obtain critical feedback or answer questions that require additional exploration or explanation" (Lafortune et Martin, 2004, p. 15 [translation]).

**Reflective-interactive autonomy**

Reflective-interactive autonomy is the ability to act relatively independently in certain accompaniment situations. It does not mean working alone; examples include knowing how and when to seek interaction, accepting feedback about ideas and actions, being able to justify one's ideas and actions, and distinguishing between situations where individual reflection is required and those where other people's ideas are helpful (both those where a theoretical and practical understanding is useful or even essential, and those where collective thinking is crucial for innovation).

Development of reflective-interactive autonomy on the part of accompanied persons is linked to their knowledge of the foundations of the change, but also to the greater and deeper understanding they gain in response to training and to their interactions with colleagues and experts (for further explanation, see Lafortune, 2008a,b).

**Reflective-interactive communication**

Reflective-interactive communication is a process that presupposes a relationship, rapport, link, or other form of interaction between individuals. In the accompaniment model, it can occur between accompaniment providers and the accompanied persons, but also as part of the relationship that accompanied persons develop with change-related content (e.g., professional competencies to be developed) and with the desired outcome of change (practices to be implemented). Communication of this nature is intended to provide information and nurture reflection on change and its effects on professional practice. It encourages individuals to interact and question their professional practices, and spurs them to action. The intention of reflective-interactive communication is to communicate change to individuals. They, in turn, interpret or decode the message to decide whether to accept the change and integrate it into their practices, but also retain the option of providing feedback. Depending on their receptiveness or past experiences, comprehension of the message can vary significantly. Feedback makes it possible to determine whether the message and related intention have been correctly interpreted and to anticipate what can be done to foster better understanding of the change. In reflective-interactive communication, it is

vital to take previous knowledge and interpretations into account. This form of communication also involves making time for listening, observation, self-questioning, and discussion; using appropriate vocabulary; establishing critical distance; and choosing means that reflect the change at hand (for further explanation, see Lafortune, 2008a)

**Reflective-interactive dynamic**

The reflective-interactive dynamic is a set of means (cognitive and sociocognitive conflict, metacognition, dissonance, awareness building, coconstruction) implemented as part of the accompaniment process to foster change within an organization. The reflective-interactive dynamic of the accompaniment model in a socioconstructivist perspective on change aims to make participants cognitively active at the metacognitive and reflective levels. Cognitively active individuals use intellectual processes that may differ (description, explanation, analysis, model building) or vary considerably in complexity (Lafortune and Deaudelin, 2001). The reflective-interactive dynamic also seeks to foster sociocognitive conflict, "a state of cognitive dissonance provoked in individuals by social interaction that brings them in contact with conceptions or constructions different from, or even incompatible with, their own". Reflective-interactive accompaniment can therefore provoke newfound awareness that results from an internal process or an external intervention and that involves consciousness (verbalized or not) of what has resulted from the process, either in personal reflection or in interaction with others (Lafortune, 2007d). These moments of newfound awareness are essential to a learning process that targets the development of complex thinking abilities and metacognition. Finally, this accompaniment can equip accompanied individuals to be attentive to: "what I am learning", "how I am learning", "what contributed to my learning", "how I can make use of what I have learned in another situation" ... (Lafortune et Martin, 2004 [translation]; for further explanation, see Lafortune, 2008b).

**Reflective-interactive techniques**

Reflective-interactive techniques involve specific actions such as questioning, interaction, reflection, discussion, feedback, and sociocognitive conflict aimed at engendering a shared vision of a change. They encourage dialogue, the challenging of ideas, and reflective-interactive communication. The new awareness and observations generated by these techniques encourage staff to move the change process forward by taking action. The persons accompanied change their model of practice when they integrate these techniques into their professional acts and practices (for further explanation, see Lafortune, 2008a).

**Reflective practice**

Reflective practice is the act of stepping back to critically examine one's operating modes and analyze, both individually and collectively, the acts and actions carried out in the course of a professional intervention. From a socioconstructivist viewpoint, reflective practice presupposes interacting with staff and reassessing the practices of individuals and groups who agree to challenge their beliefs (conceptions and convictions) and experience cognitive dissonance in the aim of achieving greater consistency between what they think, do, believe and accomplish (practices) in their professional lives. Interactions help bring inconsistencies to the forefront and enable participants to verbalize, share, and discuss them with

a view to improving the work they do. Practices can be examined at four levels: (1) what happens, (2) how it happens, (3) why it happens that way, and (4) what can be done to improve the practice.

Reflective practice comprises three components: reflecting on and analyzing one's practices; initiating action; and building an adaptive model of practice (Lafortune and Deaudelin, 2001). (1) Reflecting on and analyzing one's practice involves much more than simply discussing it with colleagues. It requires a willingness and desire to improve, adjust, or modify one's practices within an organization. It entails attempting to describe practices objectively in order to examine and analyze them with a view to improvement. The act of observing and describing becomes a lever for change. Analyzing entails making connections and comparisons, and providing justifications and explanations. It requires a willingness to accept having one's ideas and practices called into question and challenged by colleagues. (2) Action initiation shows that the reflection has led to an outcome and that the analysis is actionable. It presupposes a new and profound—as opposed to superficial—awareness, one deep enough to elicit lasting change. Initiating action is part of the transference process that results from reflection and analysis. It leads to individual and collective reviewing of actions in order to foster interactions, comparisons, and regulations that result in the updating of practices and in change. (3) This process of reflecting, comparing, analyzing, calling into question, and initiating action results in the development and evolution of models of professional practice. These models are the reflection of how professionals view their work and the main duties and tasks they perform in the course thereof—in short, everything that guides their professional conduct. Models of practice evolve over the course of peoples' careers in response to their training and experiences. This reflective process creates a dynamic whereby they continue to progress in their fields through ongoing assessment of their intentions, objectives, goals, beliefs, and values. Reflective practice is a process whereby they draw upon their practices to continue learning and developing professionally (for further explanation, see Lafortune, 2008a,b).

**Reflective writing for professional development**

Reflective writing is a technique that uses writing to reflect on one's professional practices and analyze them *a posteriori*. It helps build knowledge and develop competencies, and is also useful for training and self-learning. The goal of reflective writing is to help construct a professional practice model; it aims to conceptualize practice by examining it from a critical distance, even if there are benefits to observation in action (Lafortune, forthcoming 2009). Reflective writing differs from narrative writing. Narrative writing tells stories; recounts anecdotes; conveys facts, experiences, and practices; or clarifies contextual, affective, and other elements. Reflective writing deals with contextualized, potentially transferable experiences.

Reflective writing can be understood as a source of knowledge construction and training; it has a stimulus effect. By engaging in reflective writing, participants enter a loop where they simultaneously build knowledge, educate themselves, and perform professional acts. Through writing and subsequent acts, they conceptualize their practices and put in practice their conceptualizations—just like a reflective practitioner developing his or her own model of practice. By distancing themselves from their actions, reflective writers step back, decenter themselves, and decontextualize what they have done. They may even engender

a generalizable, communicable theory. It is no longer the personal self that is writing, but the professional self. People engage in reflective writing in order to reflect on the development of their professional competencies with the aim of eventually sharing and discussing their reflections with others, and thereby improving their practice. Professional development becomes a topic for reflection and may become a self-learning process.

Reflective writing can promote professional development (it helps develop professional identity, build experiential knowledge, etc.). Writing this way is not an innate skill. It involves learning as well as a healthy dose of humility and trust, both in oneself and in others. It also acknowledges that mistakes are a source for learning. Used in socioconstructivist accompaniment, reflective writing, unlike "free" writing, incorporates certain predetermined elements and criteria and can have a professionalizing effect. Reflective in nature, it contributes to reflection on the development of professional competencies, which could lead to discussion with others and thereby improve practice. The development of the professional competencies therefore becomes the object of reflection. Thus, the process of writing is understood to be a professionalization process that contributes to the development of professional identity and construction of practice-based knowledge (Lafortune, forthcoming, 2009; for further explanation, see Lafortune, 2008b).

**Self-evaluation**

In reflective practice, self-evaluation is a process by which accompaniment providers recognize strengths and weaknesses in the way they prepare, conduct, analyze, and adjust interventions, and in the way they guide others to do the same. Self-evaluation is "an evaluation or ... critical reflection on the qualitative value of ideas, work, situations, steps, procedures, processes, and skills based on criteria determined by the learner" (Paquette, 1988 [translation]). For self-evaluation to be meaningful and engender changes in practice, keeping a reflection or accompaniment journal to clarify one's self-evaluation process and sharing notes with colleagues are good ways to strengthen reflective practice (Saint-Pierre, 2004). People can also self-evaluate prior to observing themselves in action, for example by rating in advance their ability to perform a given task. After performing the task, they can review their self-evaluation for accuracy. In short, self-evaluation is useful in the accompaniment process because it enables participants to take a closer look at how they prepare, take action, and perform when in action, as well as carry out a synthesis or provide feedback afterwards.

To sum up, self-evaluation provides an opportunity to judge one's work. It can be performed individually, but can also be combined with co-evaluation to obtain feedback from colleagues or accompaniment providers. Self-evaluation can be carried out using question sheets to be completed at different phases of the intervention or accompaniment process. Questions can be open-ended or come with a choice of check-box answers (e.g., "not a all," "a little," "somewhat," "a lot"). To make the reflection as comprehensive as possible, justification may be requested. Self-evaluation can be performed prior to action. Once a task is completed, reviewing the self-evaluation allows the person to compare initial and final perceptions (for further explanation, see Lafortune, 2008a,b).

**Shared vision of change**

A shared vision of change is the representation constructed by a group of people over the course of the change accompaniment process. From a socioconstructivist perspective, it is difficult to achieve a vision founded on a shared understanding because people construct their representations based on their own experiences, prior learning, and competencies, but also because they have followed different paths and developed different expertise than their colleagues. However, the accompaniment process can help build a shared vision, or at least bring people closer together by enabling them to appreciate the visions of others as they work together to implement a change. Sharing a vision means discussing conceptions of the change and debating and comparing ideas and visions. It is an important step, even if the visions discussed are different from one's own, diametrically opposed, or even disturbing (Lafortune and Lepage, 2007).

On occasion, some people may be unable to fully grasp the vision supported by the majority of their colleagues. They may only agree to it in part, or even find it difficult to work in the same direction or at the same pace as everybody else. Such disparities should not go unacknowledged, because they are preferable to a "forced" consensus to which people pay lip service, but ignore in their professional acts and activities.

The construction of a shared vision requires keeping an open mind about different visions of change. The change to be implemented may not necessarily match the idea of each individual. In order to adopt or take ownership of the change, people engage in a learning and regulation process that can lead them, through their contacts with others or with the content of the change, to alter their conceptions or revisit their practices. This regulation process continues in a loop since it is continuously fueled by new information, but also by the way in which people understand change and its impact on their work life.

**Socioconstructivist accompaniment of a change process focused on updating professional practices**

The accompaniment of a process of change is a support measure related to a given field of expertise. Individuals use a model of professional practice to accompany staff affected by a change in order to help them build knowledge of the change and develop accompaniment competencies. The model of practice may differ from one person to the next, but is consistent with the foundations, aims, and intentions of the change. Accompaniment providers share and discuss their representations of the change with accompanied staff. These discussions may alter the providers' perceptions and require them to adjust to the situation, just as their perceptions will influence the representations and models of practice of those being accompanied. Accompaniment implies knowledge of the foundations, aims, and intentions of the change that has been—or is being—integrated into the accompaniment provider's model of practice. This model guides the professional decisions and acts made and performed by the provider to foster staff involvement and provide support and guidance.

The socioconstructivist perspective adopted here assumes that accompanied staff structure their knowledge about the change and develop accompaniment skills through their interactions with the accompaniment provider and their peers. As part of this process, staff compare their views of change and adjust their

models of practice by observing, examining, and analyzing individual and collective representations of the change. At the same time, they consider the model of practice recommended for the change. Interaction creates (socio)cognitive conflicts and generates newfound awareness of constructed representations. Participants reflect, ask questions, make observations, construct new representations through action, and ascribe meaning to the change they want to understand in order to take ownership. When these interactions are significant, they can transform the representations and the models of practice of the accompanied person. Complementarity of personnel and expertise enriches the process, which takes on the form of a true partnership. Accompaniment takes different individual dimensions into account: cognitive, metacognitive, affective, and social (after Lafortune and Deaudelin, 2001). With respect to content, accompaniment combines theory, practice, reflection, and action in an integrated, complementary manner. Socioconstructivist accompaniment requires a knowledge culture associated with the foundations of change as manifested in five components: attitudes, knowledge, strategies, skills, and experiences. It also involves developing and using skills that encourage accompaniment leadership (inspired by Lafortune and Martin, 2004; for additional explanations, see Lafortune, 2008a)

### Synthesis

Synthesis—the product of comparing and contrasting ideas—is an interpretation by individuals or members of a group that draws on individual and collective reflections. It takes inspiration from and speaks to a diversity of viewpoints, but not necessarily all viewpoints. Its content is structured, and often organized in an original manner. Individuals carrying out a synthesis select ideas, establish connections, and organize information hierarchically in keeping with their understanding and interpretation of the matter at hand. They may decide to eliminate aspects that do not dovetail with the proposal or request, or add new ones to make the synthesis more meaningful. Their models of practice (training and experience) will influence the aspects they deal with in preparing the synthesis by serving as a sort of interpretation guide. Their models of practice are among the available resources on which they can construct new knowledge about change.

Some might see the comparing and contrasting of ideas as an obstacle to synthesis because of the different, even opposing ideas that can emerge. A synthesis based on group interactions may represent the group's ideas or values, but perhaps not the ideas and values of each individual member of the group. The results are not necessarily integrated into the process, but may instead be used for group questioning and for fostering new awareness. A synthesis is a way to organize information at a particular moment; clarify or explain one's understanding of a situation, process, or subject; and situate oneself and one's thoughts and understanding about a given situation. It can also help accompaniment providers gain insight into the individuals or groups they accompany, see where they stand on change, and understand their comprehension of change and the way they tie it in to their professional practice (for further explanation, see Lafortune, 2008a,b).

**Taking the affective domain into account from a cognitive perspective**

Taking the affective domain into account from a cognitive perspective involves exposing and describing the situation, recognizing the affective dimensions at issue, and being able to list the causes and consequences of actions underway or already completed. Recognizing affective reactions makes it possible to take these reactions into account as they emerge, and to draw on the experience to adapt solutions to other contexts on the basis of one's own affective reactions, those of others, and those that emerge from the interaction. Taking the affective domain into account from a cognitive perspective requires an understanding of the overall situation that enables one to take the critical distance necessary to act appropriately to foster a change (for further explanation, see Lafortune, 2008a).

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She is currently at work on books focusing on the affective dimension of accompaniment, professional writing with a professionalizing effect for navigating change.

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In any organization, major change brings stimulating challenges. Changing or updating one's professional practices takes time, and the people involved need training and guidance to navigate this complex process. Change, even if it is prescribed and guided, cannot be imposed. This is why it is necessary to help staff take ownership of the change in order to understand its foundations and advantages.

Using a frame of reference developed in the field of education, this book proposes eight professional competencies required to accompany change. Practiced in context, in interaction with others, and in harmony with the workplace, with its specific culture and ways of doing things, these competencies deal both with the type of accompaniment to use and the professional collaboration that should be developed, as well as the affective aspects of taking action and exercising professional judgment. They emerge in an integrated and complementary way from the reflective practice of the accompaniment providers who help those they accompany to engage in such practice.

The eight competencies form a system that influences, directs, guides, and challenges all the decisions, actions, and judgments of those who accompany the change, in such a way as to encourage staff affected by the change to take ownership of it.

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