Rapport-Building for Educational Developers

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Educational Developers Caucus
le Réseau de formateurs en pédagogie de l'enseignement supérieur

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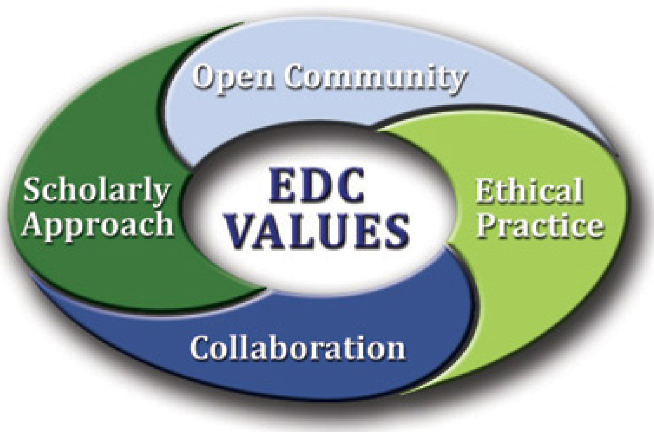
Educational Developers Caucus

As a community of practice, the Educational Developers Caucus engages individuals in educational development across Canada to network, share resources, collaborate on key issues through action groups, and connect through professional development opportunities.

Since the initial working group in 2001 and the establishment of EDC within the Society for Teaching and Learning in Higher Education in 2003, our community has grown. Reflecting our continuing evolution, our Living Plan is regularly renewed by our community to describe our evolving practices and needs tproviding a framework for aligning our professional development initiatives including grants, conferences, institutes, action groups, and webinars.

Our initiatives reflect our values of:

- **Open community** - We welcome all persons who share an interest in educational development work. We seek and value diverse perspectives on this work and the individual backgrounds, expertise, and wisdom ED professionals bring to our community.
- **Collaboration** - We encourage freely sharing our collective knowledge about educational development and related topics for our mutual benefit. We support a collaborative and peer-facilitated model of professional development for our members at all career stages.



- **Ethical practice** - We demonstrate integrity and transparency in all our interactions. We uphold the highest possible values in collegial scholarship, crediting others for their contributions, and undertaking all work according to accepted ethical practices and policies.
- **Scholarly approach** - We take a scholarly approach to our work, drawing on a variety of resources and contributing to that knowledge through our own scholarly inquiry. We embody multiple approaches to scholarship and its sharing so others can benefit from our work.

About the Educational Development Guide Series

The Educational Development Guide Series offers in depth open, scholarly, collaborative, and practical resources for new to experienced educational developers.

With the aim of embodying and furthering evidence-informed reflective practice in educational development, ED Guides are expected to:

- provide a practical and applied resource for educational development practice;
- draw on established literature and/or research, in addition to lived practice;
- reflect diverse contexts and perspectives within educational development;
- achieve high quality writing through constructive peer-review; and
- draw on the richness of our community by inviting contributions or collaboration from EDC action groups, ED colleagues, and/or others in response to a call for expressions of interest or initial conference sessions.

Further details of our ED Guides planning and creation process can be found online.

Table of Contents

Foreword

Lynn Taylor

Rapport-Building for Educational Developers invites us into the seldom explored “inner world” of educational development practice. As richly illustrated in the voices of developers themselves, establishing rapport—creating reciprocal learning spaces based on trust, mutual respect, and empathy—is essential to our practice. Despite its importance, our understanding of rapport and how it facilitates the development of teachers and developers alike remains implicit in practice. The authors of this guide engage readers in actively constructing explicit understandings of rapport that can be critically examined, integrated in practice, reflected upon, and elaborated (Kegan, 2002). This was not a simple task. As one interviewee observed, developing rapport is a process of “weaving rather than building” that emerges through authentic and highly contextualized interactions across our work with individual colleagues, groups, educational development peers, and our institutions.

The authors reflect this complexity throughout *Rapport-Building for Educational Developers*, integrating scholarship from diverse fields, the wisdom of educational development practice captured from in-depth interviews, and guided reflections of individual readers as they examine the meaning and scope of rapport in different contexts. This integration is critical to the value of this guide. Rowland (1999) made a compelling argument for the importance of creating a synergy among the *private context* of one’s own experience, the *public context* of formal knowledge in the field, and the *shared context* where knowledge generated in private and public contexts is shared, applied, evaluated, built, and recognized if we are to enable both “the development of new practices and more developed theories” (p. 312). Similarly, in conceptualizing professional learning across fields of practice, Simons and Ruijters (2004) identify the importance of intentionally integrating the learning in and from practice, research, and community in our ongoing professional development and learning.

The essence of professional learning is captured in Chapter 6 where Julie A. Timmermans and Carolyn Hoessler use Robert Kegan’s (2000) developmental learning framework to characterize the development of rapport as learning “the types of ‘tools’ or ‘strategies’ used by an educational developer (informational change), as well as changes in an educational developer’s ways of thinking about self, instructors and the rapport building process (transformational change)” (p. 57). The integrative approach taken in the guide creates a learning space where we are challenged to reflect on the meaning and impact of rapport in our personal practice. *Rapport-Building for Educational Developers* is a carefully-crafted professional learning experience, giving words—from both rapport theory and practice—to a process that is often known only implicitly, and engaging readers in a critical examination of how the development of rapport unfolds uniquely in each relationship and is influenced by the interaction among personalities, cultures, disciplines, and teaching beliefs and situations.

Although it is fascinating to examine the meaning of rapport and the conditions under which it is nurtured, the most resonant question that arose from my own engagement with *Rapport-Building for Educational Developers* was why rapport is so important in our growth as teachers, developers, programs, and institutions. I largely believe the answer resides in the intimate nature of learning about practice. Building trusted, reciprocal relationships with individuals or groups is critical to enabling respectful “significant conversations” in which “university teachers continuously construct, maintain and develop an understanding about teaching and learning” (Roxå & Mårtensson, 2009, p. 555). Such conversations are at the heart of educational development practice.

It is perhaps not surprising that the characteristics of significant conversations—trust, mutual, respect, reciprocity, privacy, and intellectual engagement (Roxå & Mårtensson, 2009)—overlap extensively with the defining qualities of rapport. What is it about these significant conversations that makes establishing rapport so important to our practice? It is largely because these conversations are significant not only for the impact they have on the learning experiences of our students, but also on our very identities as teachers. Parker Palmer (1998, 2007) captures the essence of the intimacy embodied in significant conversations about teaching in his explanation of how a teacher’s personal identity and integrity interact to contribute to our professional growth. Palmer characterizes identity as our ability to recognize the diverse forces of our beliefs, values, personalities, and experiences. Being aware of how these forces form our core beliefs as teachers and how they are related is a critical first step in our continuous growth as teachers.

Palmer’s interpretation of personal integrity—being true to the “teacher within” (Palmer, 1998, p. 29)—derives from our ability to relate to those tensions we experience as we work in the disciplinal and organizational contexts we have chosen and as we respond to them in ways that generate a response consistent with knowledge of self, discipline, and context. Even as individuals, we can be challenged to reconcile some of the tensions between our personal beliefs, the cultures of our disciplines, or the contexts in which we teach. When we interact with others—students, colleagues, or administrators who do not share our perspectives—those tensions are sometimes more visible to us.

Maintaining our integrity is much more than defending our own identities. The strongest kind of integrity lies in responding to the inevitable tensions we discover from the interconnections between our perspectives and those of others. In negotiating these differences, some of our deepest learning occurs (Palmer, 1998). This is true for individuals, in our teaching, and for whole communities of practice. Staying grounded in our identities and being aware of how we are growing as we address the tensions we encounter in significant conversations about teaching are essential to our very identities as teachers and to sustaining our passion for our work (Palmer, 2007). It is no wonder, then, that the conditions for these conversations require trust, mutual respect, and empathy.

It is a privilege to engage in significant conversations about learning and teaching with each other. These conversations are built on a trust that our learning, and our students’ learning, motivates our discussions. They are sustained by reciprocity—the honest give and take of ideas, experiences, and perspectives offered with mutual respect and received with genuine intellectual engagement. Significant conversations can run deep. We not only share practices, but also critically examine and sometimes change the values, beliefs, and goals that shape our identities as teachers. Educational development practice focuses on enabling those conversations across personal, disciplinary, and organizational boundaries. In those conversations, we stand with colleagues in the intersection between their personal identities as teachers, the research evidence, and the strongly-held cultures of their disciplines and institutions. Rapport—in the deep sense that it is conceptualized in *Rapport-Building for Educational Developers*—is essential to fostering significant conversations in this complex personal, intellectual, and cultural context.

Lynn Taylor

University of Calgary

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Introduction

Kim West and Carolyn Hoessler

Rapport

In this guide, we seek to understand the essence of *rapport*, a quality integral to the relationship between educational developers and instructors, but difficult to define. The terms for this relational quality vary across the academic literature since rapport is elusive and varies for different people, contexts, and relationships. For this reason, we invite readers of this guide to simultaneously reflect on and define this quality in their own words.

Our Roots

This guide arose from a collegial conversation between the two coordinating authors about rapport and its role in educational development. After discovering a lack of existing research on rapport building in educational development, we, the coordinating authors, sought the insights and experiences of educational development colleagues by conducting the interviews mentioned in this guide. After conducting these interviews, we decided to engage further in conversation by inviting colleagues across Canada to collaborate on this guide. As such, this guide has been rooted in the individual yet diverse connections and insights that interviewees and collaborators have brought to the monumental challenge of describing and discussing rapport.

Our Methodology

We held individual interviews with educational developers in 2013. The call for interviews was sent out via email on the Educational Developer Caucus (EDC) listserv following research ethics approval at the University of Saskatchewan. At each step in the research process, we aimed to embody and model rapport and community building. This included sending five core questions in advance of interviews (see Appendix), using conversational openings to interviews, coding quotations as large sections within the whole transcript when deriving themes, connecting with the community throughout to inform our understanding, and then inviting and collaborating with the co-authors on this guide.

Most educational developers who were interviewed for this guide had more than ten years of experience. In addition, all interviewees lived in Canada, except for one individual who was interviewed from the United States. Interviews occurred via Skype or phone, and were recorded and transcribed with permission. Transcripts were sent for review and the findings in this guide have been shared in an anonymous format to protect the interviewees' identities. Quotations from these interviews have been included in each chapter and have more broadly framed the themes, thinking, and ideas throughout the guide.

Three Types of Knowledge

Our goal was to intertwine three types of knowledge to create a collective understanding of rapport and rapport building:

- **lived experiences** from individuals who were interviewed and from the authors of the guide, called *practical wisdom* by Bamber and Stefani (2015);
- **established scholarship** from the literature in educational development and across other disciplines, called *research* by Bamber and Stefani (2015); and
- **individual reflection** prompted by reflective questions for our readers throughout each chapter.

Terms

We use the term *educational developers* (EDs) throughout the guide to refer to individuals who are involved in *educational development*, including seconded faculty, graduate student fellows, instructional designers, managers, and staff who support instructors in their teaching and learning goals. The term *instructors* here encompasses tenure-track and term faculty, sessional and clinical instructors, graduate student teachers, lab coordinators and instructors, and teaching assistants. We recognize that the terms we have chosen may not fully capture all unique individuals, their roles, or their experiences across our rich and diverse profession.

Audience

This guide is intended for new EDs who are learning the language and skills of rapport building, as well as intermediate and more experienced EDs who are seeking to deepen their knowledge and understanding of rapport. All EDs, across the spectrums of experience and roles, can use this guide to build or enhance their knowledge, wrestle with contextual factors, reflect on lessons learned, and discuss issues with peers as part of an ongoing reflective and scholarly practice.

Organization of the Guide

This guide begins with three case studies on rapport that are designed to compare and contrast differing contexts and perspectives, inspire reflection, and spark discussion with peers. The first three chapters of the guide focus on building a conceptual foundation of knowledge of rapport, beginning with a definition (Chapter 1), reflecting on why rapport is important (Chapter 2) and discussing how rapport is shaped by contextual factors (Chapter 3). The middle section of the guide focuses on practical strategies for building rapport in individual consultations (Chapter 4) and groups (Chapter 5). The final section of this guide delves deeper into mentorship and professional growth by considering the informational/transformational aspects of rapport building (Chapter 6), how EDs can engage in collaborative learning and sharing of rapport-building techniques (Chapter 7), and how EDs can coach others in leadership roles within educational development centres (Chapter 8).

Reading this Guide

If you are new to educational development, consider beginning with identifying what rapport is (Chapter 1), how to build rapport with individual instructors (Chapter 4) and why it is important (Chapter 2). If you work with groups in your educational development practice, you may wish to read Chapter 5. If you are an experienced ED, the chapter abstracts and the case questions provide potential foci for further reading. To deepen your understanding of rapport, explore why rapport matters (Chapter 2), and the influence of contextual factors (Chapter 3). For EDs seeking a long-term perspective on rapport across their careers, Chapter 6 offers a lens to describe growth, and Chapter 7 and Chapter 8 speak to aspects of rapport related to mentoring and coaching. A non-linear approach to reading this guide might be to read and reflect on the case studies provided at the start of the guide and then to choose specific chapters of interest from the reflective questions included with the cases.

Recognizing the Unique Perspectives of our Authors

Each of the chapters in this guide is written by a different author or combination of authors in educational development. Accordingly, each chapter has a different writing style and presents unique examples from the author's experiences that reflect the author's unique perspective on rapport and rapport building in educational development.

We recognize that this guide is inherently tied to the perspectives of all the authors including interviewees who are individuals situated within the lenses of specific disciplines, experiences, cultures, and identities. In the writing of this guide we were conscious of how rapport is thought about, approached, and experienced differently across each of these dimensions. By broadly seeking contributions to this guide, our hope was that it would represent distinct voices across our community. Yet there are voices that remain absent from our discussion, particularly the wealth of insights that could be offered on rapport by both Indigenous and international perspectives and experiences. We invite you to consider seeking these perspectives and experiences in larger conversations about rapport with your colleagues.

We have learned a lot through the creation of this guide, and we hope it will contribute to your ongoing professional growth too—Happy Reading!

Kim West & Carolyn Hoessler

University of Saskatchewan

Chapter Abstracts

Chapter 1. Rapport: A Multifaceted Concept in Educational Development

This chapter presents a collective definition of rapport and its core facets in educational development. It also explores multifaceted variations in how EDs describe rapport (as both a process and way of being) and initiate rapport (personal and professional connections).

Chapter 2. Rhetorical Insight into the Role of Rapport in Consultations

Rapport is the foundation from which EDs support instructors. This chapter discusses the significance of rapport building in consultations by adapting a framework from the discipline of rhetoric. In using this framework, the chapter discusses constraints that EDs should also consider in rapport building, including understanding the cultural identity of the instructor and self-care.

Chapter 3. Factors Influencing Rapport Building: Culture and Context

This chapter is intended to provide readers with a theoretically-informed, yet practical, methodological, and ultimately individualized, approach to considering the ways that institutional cultures and contexts might influence work in rapport building. To help the reader cultivate a more situated practice for assessing the factors influencing rapport building in their own institutional context and culture, a series of guiding questions are proposed.

Chapter 4. The Five Moments of Building Rapport with Instructors during the Individual Consultation Process

Chapter 4 looks at how to build one-on-one rapport with instructors. There are four key *knowledges* to consider when facilitating consultations as an ED. The *knowledge of process* will be the primary focus of this chapter, with aspects from the other three *knowledges* (self, others, and relational tools) appearing throughout for additional guidance. Within this knowledge of process, each of *the five moments* will be described: preparing, welcoming, exploring, concluding, and wrapping-up. For each moment, core information, best practices, strategies, tools, and reflective questions are included.

Chapter 5. Rapport in Groups

In this chapter, we explore building rapport in groups. As EDs, we have many opportunities to work in group settings (e.g., workshop facilitation, teaching retreats, communities of practice). Working with a group of individuals is complex as we strive to build rapport with members of the group and support rapport development among group members. We begin the chapter by defining *groups* and exploring stages of group development. We then consider facets of rapport in a group context. Finally, we apply these ideas to three scenarios relevant to your role as an ED.

Chapter 6. Unfolding Rapport-Building Professional Development: Informational and Transformational Growth

EDs' rapport-building practices grow through new insights and experience in two distinct yet related ways: informational growth that expands tools and strategies, and transformational growth that shapes new ways of seeing instructors, themselves, and the rapport building process. This chapter describes the informational and transformational development seen in rapport building, and invites reflection on these two journeys in one's own individual practice, and in the one's practice of those one mentors and coaches.

Chapter 7. Mentoring Educational Developers in Rapport-Building Skills

This chapter is intended for newer EDs who would like to learn more about rapport and more experienced practitioners who would like to share their knowledge and skills. The chapter discusses collaborative models of mentorship and five techniques that experienced EDs can adapt for explicitly modelling how they build rapport with others.

Chapter 8. Building Rapport among Teaching Centre Staff through Organizational Coaching

This chapter explores how leaders and managers in teaching and learning centres can use coaching as a vehicle for building rapport with centre staff. It is written for those currently holding or aspiring to transition into a management or leadership role. Drawing on scholarly literature, the chapter describes coaching behaviours and presents practical strategies and sample questions for applying coaching in performance management processes. These strategies can be adapted to build rapport within a variety of centre contexts.

Acknowledgements

We are thankful for the community of EDs who directly supported the work of this guide, including the individuals who shared their perspectives in interviews and to all the individuals who provided feedback at various stages in the development of this guide, including at conferences and as reviewers.

We are also grateful to the instructors with whom we share the experience of rapport-building, without which the guide and our ED work would not be as rich of an experience.

Our gratitude to Lynn Taylor for writing a Foreword that magnificently introduces our readers to this guide..

We appreciate the EDC's ongoing support for the Educational Development Guide series and thank Jessica Raffoul for all her work in coordinating the series. We are also grateful in having received an EDC Grant that supported the transcription of interview data and the analysis of written themes for this guide.

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Roselynn is an educator, facilitator, and curriculum developer, with experience in a variety of educational settings. She works as a Curriculum Consultant at the UBC Centre for Teaching Learning and Technology and holds a Bachelor of Education Degree; an MA in Society, Culture, and Politics in Education; and is currently completing a PhD in Educational Studies.

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Natasha Kenny is the director of the educational development unit at the University of Calgary's Taylor Institute for Teaching and Learning. As director, she works to advance the university's educational vision, collaborates with colleagues to build teaching and learning capacity, and actively engages in scholarship related to educational development and teaching and learning in post-secondary contexts.

Cases

From our experiences writing this guide, we've learned that rapport can look and feel "drastically different" (Interview 12) depending on the context and on the individuals who are involved in the process. We've provided the following three cases for readers to begin to think about why and when rapport occurs, and to reflect upon those situations in which rapport, for whatever reason, may not be built.

The cases reflect the topics that are discussed throughout the guide and are also referred to specifically by the authors of each chapter. You may wish to return back to these cases periodically to critically reflect on your ideas about rapport within the context of your own educational development practice. You may also consider discussing these cases with a colleague or mentor to learn more about their perspective and experiences with rapport and to consider why their perspective and experiences might differ from your own. Look for this symbol might when a case is referred

Case #1: First-Time Consultation

The case depicts a first-time consultation between an instructor, Noura, who is teaching a class and an ED, Sharmi, who has some teaching experience.

[Noura arrives at Sharmi's open office door. Sharmi is working on her computer at her desk.

She glances at the door, makes eye contact with Noura, and stands up with a smile, inviting her in.]

[Sharmi]: Hello Dr. Doroshenko; please come in. It's good to meet you. I'm Sharmi. *[Shakes hands with instructor.]*

[Noura]: Good to meet you, too. *[Glances around ED's office, which has some personal touches including books and wall art.]* You can call me Noura.

[Sharmi]: Please have a seat, Noura. *[Gestures to a round table next to the desk with a plant, tablecloth, and 2-3 chairs.]* There's a stand over there if you'd like to hang your coat. Would you like a coffee, tea, or water?

[Noura]: No thank you. *[Sharmi waits as Noura hangs her coat, then they sit down at the table.]*

[Sharmi]: Lovely weather, isn't it?

[Noura]: Yes, it's very mild for this time of the year.

[Sharmi, *making eye contact and leaning forward slightly***]:** Thanks for coming in today. I'm really looking forward to our conversation. Before we start, I'd like to remind you this consultation is confidential so whatever we discuss stays between the two of us.

[Noura]: Okay.

[Sharmi]: In your email you mentioned you wanted to discuss teaching large classes effectively?

[Noura, *crosses arms***]:** Yes, I'd like to change things up a bit in the large class that I teach. I'd like to engage my students more. I use videos to try and get students interested in the content. But they don't really talk and I'm struggling to find ways to get students to engage.

[Sharmi]: For sure, it can be frustrating when students don't respond. Describe to me what is usually happening in your class, before and after the video, for example?

[Noura, *uncrosses arms, speaks quickly***]:** Well, last week we were talking about marginal benefit versus cost. I used a 2-minute clip from a popular TV show, where one of the characters tries to talk the other into buying illegal cable. I posed a few questions to the class afterwards, but it's always the same students who tend to respond. The thing is—my feedback on student evaluations tells me they love the videos, but they still won't talk in class!

[Sharmi]: What strategies have you tried so far to engage your students? What worked, what didn't?

[Noura]: I usually don't have time to incorporate any discussion or group work but I would like to. There's a lot of content to get through and my lectures are only 50 minutes long.

[Sharmi, *nods***]:** I'm hearing that time is a challenge for you but you want to get students talking.

[Noura, *nodding***]:** Yes. I tried to incorporate what I called a "Case Study in Two Minutes" at the end of one of my lectures and it was a disaster. *[Laughs, leans forward.]*

[Sharmi, *leans forward***]:** What happened?

[Noura]: Nobody responded, so I ended up quickly summarizing what I wanted them to get out of the case study and then the lecture was over.

[Sharmi]: Well, at least you aren't the first instructor who ran out of time for an activity before. *[Smiles.]* I can't tell you how many times that has happened to me.

Reflecting back, what do you think you might do differently?

[Noura]: Hmmm… *[Pauses.]* I'm not really sure.

[Sharmi]: Have you ever used a teaching technique before called think-pair-share?

[Noura]: No, I haven't.

[Sharmi]: The reason I mention it is because it's a great technique for helping students to get to know each other. I find that in a large class students can sometimes be shy about speaking in front of their peers. It's challenging when you are teaching in a 50-minute time slot and there's not a lot of time for activities. The think-pair-share is a technique that can really help with that.

[Noura and Sharmi discuss think-pair-share as a teaching strategy and a few other teaching strategies appropriate for a large class setting.]

[Noura]: Thanks very much. I feel really inspired after talking with you. I'm definitely going to try some of these active learning techniques we talked about in my class.

[Sharmi]: I'm glad you found our conversation helpful. Perhaps we can meet in a couple of weeks to talk about how things go?

[Noura]: That would be great! I would really like that.

[Sharmi]: I'll email you later today with those resources we talked about. I'll also suggest some times when we could next meet.

[Noura, *getting ready to leave***]:** Okay, thanks. *[Stands.]*

[Sharmi, *stands***]:** It was really nice to meet you today. I appreciate having the opportunity to talk with instructors such as yourself who are so enthusiastic about teaching. Good luck, and I look forward to seeing you in a few weeks.

[Noura]: Thanks for taking the time to meet with me today. Bye.

[Sharmi]: Bye.

Reflective Questions for Case #1:

- In this case study, what did you notice about how rapport was built? What did Sharmi do to initiate a connection with Noura? When and how did Noura respond?

See Chapter 1, Establishing Personal and Professional Connections, and Chapter 4, Moment 2, Welcoming the Instructor

- How did Sharmi welcome Noura into her office space? What observations did you make about the office space? Is it important and/or authentic for you to act as a host or to welcome an instructor into your office space? Why or why not? If you were the instructor, would it matter to you if you perceived the space to be welcoming or not?

See Chapter 4, Moment 2, Welcoming the Instructor, and Chapter 3, Spaces

- At what point was Sharmi successful in building a rapport with Noura? How do you know when you have built rapport with an instructor? Do you rely on certain cues or indicators of rapport? Are there certain cues or indicators that you rely on more often than others? If yes, why do you think that might be the case?

See Chapter 4, Moment 3, Active Listening

- What verbal and nonverbal behaviours, communication strategies, and active listening phrases did you observe that might have contributed in some way to building rapport with Noura?

See Chapter 4, Moment 3, Active Listening

- Trust, empathy, and respect are significant factors for building rapport in an educational development context. Is there any evidence that these factors may have contributed to rapport-building between Noura and Sharmi? In what ways and why?

See Chapter 1 for more information on the core facets of trust, empathy, and respect

- There are many ways that an ED could have potentially approached this conversation. Do you think you would approach this conversation similarly or differently? For instance, at one point, Sharmi uses reassurance as a strategy to connect with the instructor when she says, "I can't tell you how many times that has happened to me." Would you use reassurance as a strategy or approach the conversation differently? Throughout this conversation, what strategies (other than reassurance) might feel most authentic for you and why? How are these strategies connected to your own personal perspective on rapport and/or experiences?

See Chapter 1, Establishing Personal and Professional Connections, and Chapter 4, Moment 3, Active Listening

- What do you think Sharmi could have done to contribute to rapport-building with Noura before Noura even arrives for the consultation? What follow-up strategies could Sharmi use to extend rapport-building after the consultation?

See Chapter 4, Moments 1 and 5

- Consider how Sharmi might view what rapport looks like? How do you see rapport and your role?

See Chapter 6 for how ways of seeing rapport and how the ED's and instructor's roles may change

Case #2: Unexpected Clash

This case focuses on an instructor, Cecilia, who is teaching a class and Paulo the ED with whom she consults with. Paulo was recently hired into his role as an educational developer at a small college and this is one of his first consultations. So far, Paulo has been lucky in that colleagues have provided him with advice and guidance when asked, but he is nervous about the upcoming consultation with Cecilia as he has not received any direct mentorship or support on rapport-building or even on the basics of what to do during a consultation. Paulo has heard from others that Cecilia is known to be a very experienced and opinionated instructor. He has spent quite a few hours digging into the scholarly literature on best practices in teaching and learning and reading the EDC listserv, scanning it for best practices about what to do during a consultation. He hopes he will make a good impression during the consultation by sharing his knowledge about best practices with Cecilia. The big day finally arrives, and here's how it goes:

[Paulo]: Hi, welcome, I'm very excited to meet with you today.

[Cecilia, *crossed arms***]:** Hi, yes, well, my Department Head recommended that I speak to someone here about the comments from my student evaluations.

[Paulo]: Okay, why don't you tell me a little more about that?

[Cecilia]: The students don't like the way I respond to questions to class. They say that I'm too abrupt or gruff. Am I too abrupt and gruff? [Rhetorical question.] I don't know… but the way I see things is black and white. There is a right or wrong answer. I just don't see the point of wasting time making the students feel better about themselves.

[Paulo]: So what I'm hearing is that students think you are too abrupt or gruff when responding to their questions….

[Cecilia, *exasperated, cutting Paulo off***]:** Yes, I just told you that! Have you ever been in a situation like this? Do you teach students at all?

[Paulo]: My role here at the Centre is to support instructors such as yourself who are teaching. I have had experience teaching before, although not currently, and I am very familiar with the best practices from the scholarly literature on teaching and learning. I am hoping to share a few ideas with you on rapport building from…

[Cecilia, *cutting Paulo off again***]:** How can I learn something from someone who is not currently teaching themselves? Thanks for your time, but you don't understand the realities of my situation. *[Cecilia leaves.]*

[Paulo then seek out a colleague for advice on what went wrong and how he could have handled this situation differently.]

Reflective Questions for Case #2:

- What strategies did Paulo usein attempting to build rapport with Cecilia? What would you do similarly or differently as the ED in this situation?
- What would you adjust in your introduction, questioning and nonverbal behaviours when facing an instructor who was sent to you by their Chair, instead of coming of their own volition?

See Chapter 2, Constituent 1: Exigence

- What collegial advice would you offer Paulo if he came to you after this incident occurred?

- What implications might this situation have on a) Paulo's long-term rapport with Cecilia, b) the relationship between Cecilia and the Centre, and c) the relationship between Cecilia's college, department, school, or unit with the Centre?
- What strategies could Paulo use to rebuild trust/rapport with Cecilia after this incident?
- How might Paulo's existing ways of seeing himself, instructors, and rapport building shape his reflections about his experience with Cecilia?

See Chapter 4, Moment 5: Wrapping up from the meeting

See Chapter 6 and Chapter 2, Constituent 2: Rhetorical Audience

Case #3: Working with Colleagues

This case focuses on the nuances of rapport between two educational developer colleagues, Hasan and Lydia. Even though Hasan and Lydia have worked together on educational development projects before, this case focuses on the interpersonal dynamics between the two colleagues as they plan a workshop on teaching portfolios. As planning unfolds, Hasan and Lydia discover what seem to be different underlying educational philosophies about how to work with different groups of instructors.

[Hasan]: I'm really looking forward to with you on this upcoming teaching portfolios workshop!

[Lydia]: Me too, Hasan. We haven't had many opportunities lately to work together, so I think this will be fun.

[Hasan]: Okay, to get started maybe we should talk about if we want to tailor this upcoming workshop. I know some Centres have workshops that are tailored for specific groups like faculty, graduate students, etc. I really think this is a good idea. We could tailor our workshop so that it is more geared toward faculty. What do you think?

[Lydia]: Hmm, one of the benefits of offering the session this way would be that it would be more tailored to address faculty needs. I do have a couple of concerns though. In my experience, it's been really great bringing together people of different experience levels because they can learn so much from one another…

[Hasan, *cutting off Lydia***]:** Yes, but we've had some workshops in the past with faculty members and graduate students from the same department and that hasn't gone well. The graduate students weren't comfortable at all providing feedback to faculty on their portfolios.

[Lydia]: That's true. I think with proper planning we could set up the feedback sessions so that doesn't happen again.

[Hasan]: Well I think moving forward we shouldn't force people into uncomfortable situations. Besides, I prefer to work with faculty-only groups. My position focuses on faculty development much more so than graduate student development, and I need to prioritize my time.

[Lydia]: Okay, well that is good to know as we plan ahead for upcoming workshops. I think we may have some differing views on how we want to engage with faculty members and graduate students. For this workshop, we already have some graduate students registered along with faculty. I think we will have to work with what we have.

[Hasan]: Okay, we'll plan for having both audiences this time, but I think we will need to think about this more thoroughly for next time.

Reflection Questions for Case #3:

- Does rapport exist in a situation where two colleagues like Hasan and Lydia disagree or struggle to connect on a philosophical basis? Why or why not?

See Chapter 2, Rhetorical Insight into the Role of Rapport

- Barkley (2017) suggested the following: "To build rapport you don't have to like the other person's model of the world, or agree with it, but you have to at least understand it" (para 6). What could Hasan and Lydia have done to better understand where the other person was coming from?
- When reading this case study, try to empathize by putting yourself in the shoes of Hasan and Lydia. Rather than distancing yourself, think about what you would truly say, do, and feel from each of their perspectives.
- How might your values (e.g. harmony, self-preservation, conflict management style, personality, and/or past experiences) affect how you would respond as either Hasan or Lydia in this scenario?

See Chapters 7 and 8

- How do trust, empathy, and respect factor into this scenario from both Hasan's and Lydia's perspectives? For instance, how might the following quotation from one of our interviewees factor into this context? "… they've gotta feel like they can say anything to you about what's going on with their teaching" (Interview 14).

See Chapters 1 and 2

- Would your response as Hasan or Lydia differ if you were in a negative work environment versus a positive work environment? What role(s) do you think emotions could play in either Hasan or Lydia's response and future behaviour?

See Chapters 2, 7, and 8

- How would this situation change if the power dynamics between Hasan and Lydia shifted (e.g. change in job roles or status)? For example, what if Hasan was the Director of the Centre and Lydia was a newly hired ED colleague with experience primarily from another university?

See Chapters 7 and 8

For Further Reflection and Practice –Your Own Cases

- Take turns with a colleague practicing different rapport-building scenarios from your own experiences. Aim to practice experiencing the give and take of rapport from both perspectives.
- To become more conscious of how you build rapport within your practice, take rapport-building notes during your next consultation. As you meet with someone, partition one area of your notes for observations that you make about rapport and the rapport-building process. Discuss your observations with a colleague afterwards, being careful to only share process-oriented pieces about rapport rather than confidential information.

Chapter 1

Rapport: A Multifaceted Concept in Educational Development

Carolyn Hoessler and Kim West

Introduction

In our research, we've discovered there are multiple (and sometimes contrasting) perspectives on what rapport looks and feels like for EDs. In the Introduction to this guide, we describe three types of knowledge: lived experience, established scholarship, and reflection. In this chapter, we consider each type of knowledge in our goal to define rapport and its core facets (trust, empathy, mutual respect) in educational development.

Rapport is not static, nor identical, across ED's experiences, but is shaped by EDs' values, experiences, and educational development philosophy. Throughout this chapter, we explore variations in how EDs describe and initiate rapport. EDs describe rapport as both a process and experience. EDs who describe rapport as a process see it as a series of steps across an evolving relationship rather than a single experience. In contrast, EDs who view rapport as an experience describe the quality of the working relationship, that is, being in a trusting and respectful relationship. We then discuss the different ways that EDs can initiate a connection either through shared personal experiences (e.g., discussing family life or shared interests), or as professionals (e.g., discussing common challenges or similar teaching experiences). As an ED, you may prefer to initiate rapport in one way, or use different ways given the situation or context. In the end, how you see and build rapport depends greatly on your own values, experiences, and philosophy.

Chapter Learning Outcomes

By the end of this chapter, readers should be able to:

- Critically reflect on and formulate what rapport means based on the collective definition presented in this chapter;
- Discuss the multiple facets and characterizations of rapport, including how EDs perceive rapport as both a process and experience; and
- Identify how to balance making personal and professional connections with instructors based on a unique approach and philosophy of educational development.

On a broader scale, rapport may vary within the individual contexts and circumstances of our profession. Just like the differing plays of light on a reflective surface, this chapter explores multiple facets of rapport and how it varies in educational development. Throughout the chapter, we've provided Reflection Points for you to consider what rapport looks and feels like for you and to reflect on your experiences of rapport to build on the presented insights from existing scholarly literature and the lived experiences of the EDs interviewed (described in the guide's Introduction).

Defining Rapport: The Scholarly Literature

Rapport has been defined many times in academic contexts and disciplines within the scholarly literature. It has been studied the most extensively in what are considered the "helping professions," including psychology,[1] nursing, therapy, patient care,[2] and education.[3] Within education, rapport is more commonly cited in administrative and K-12 studies than in college and university education studies. Rapport has also been studied in non-academic and academic contexts in fields such as communication, business, and marketing.[4]

Across these different academic contexts, four components are frequently included in any scholarly definition of rapport (Buskist & Saville, 2001; Faranda & Clarke, 2004; Jorgenson, 1992; Tickle-Degnan & Rosenthal, 1990):

- it is a relationship,
- it develops from positive interactions,
- it involves reciprocity or mutuality, and
- it results from trust, caring, and/or a shared connection.

Rapport is foundational to building relationships with others. Most definitions describe rapport as a positive relationship; a lack of rapport is generally associated with negative interactions or the absence of a relationship. Rapport involves reciprocity or mutuality, the former referring to exchanges of mutual benefit and the latter referring to shared feelings or experiences. In fact, the etymology of the word "rapport" comes from the late 12th century Anglo-Norman and Old French verb, "rapporter," which means "to bring back"; the 20th century use focuses on "mutual understanding between persons; sympathy, empathy, connection; a relationship characterized by these" (OED Third Edition, Dec. 2008). Building on the theme of mutuality, Jorgenson (1992) defines rapport as a "co-interpretative experience," or one that involves the "bringing back" of feelings or experiences. We'll turn our attention next to defining rapport in the context of educational development through the lived experiences of EDs.

Defining Rapport: Lived Experiences and a Collective Definition

We interviewed twenty EDs from across Canada and the United States.[5] From inductive analysis of these lived experiences, we identified three core facets of rapport: trust, empathy, and mutual respect. In drawing upon the scholarly literature and the lived experiences of EDs, we have arrived at the following definition of rapport in the context of educational development:

> **Rapport is the process or experience by which individuals or teams of EDs and instructors build a mutually positive connection, relationship, or shared understanding with one another in an atmosphere that is conducive to reciprocal trust, empathy, respect, openness, growth, and change.**

We recognize that our definition of rapport may not fully capture the unique roles or experiences of every ED across our rich and diverse profession. Using the reflective questions below, take a moment to reflect on what rapport means for you.

---

1 Altman, 1990; Hendrick, 1990; Izard, 1990 in psychology

2 Barnett, 2001; Beck, Daughtridge, & Sloane 2001; Fine & Therrien, 1977; Roter, 2000; Travelbee, 1963 in nursing, therapy, and patient care

3 Beidler, 1997; Benson, Cohen & Buskist, 2005; Bain, 2004; Dobransky & Frymier, 2004; Frymier & Houser, 2000; Frisby & Martin, 2013; Knaack, 2011; Lowman 1995; Rogers & Renard, 1999; Rowe, 2000; Starcher, 2011; Tiberius 1993-1994; Weimer, 2010; Wilson & Ryan, 2012 in education

4 Bregman, 2013; Buck, 1990; Catt, Miller, & Schallenkamp, 2007; Fiksdal, 1988; Raines & Ewing, 2006 in business, communication, and marketing

5 The interview and research process is described in the Methodology section of the Introduction to this guide.

Reflection Point

- What words, images, or metaphors resonate with how I see rapport? How would I describe rapport to others?
- How do my perceptions of rapport differ from my colleagues? Seek opportunities to ask others and hear differing perspectives.
- What experiences do I have in building rapport through trust, empathy, and mutual respect with others?

The Core Facets of Rapport: Trust, Empathy, and Mutual Respect

These core facets of rapport are key concepts that underscore rapport building in the context of educational development. In our research, all the EDs referred to at least one or more of the core facets when asked to describe rapport. In addition, one ED took a more bird's eye view by describing the interrelationship between the core facets:

> by rapport, for me what that means is a kind of a mutuality. A mutual trust and care…They know somehow that they trust me and I trust them. So there's like an element of trust, and an element of empathy. And it's got to be felt by them, that I feel empathy for them. They need to know that somehow. So to me it's like this communication act that involves mutual trust and respect and care. It's like an ethic of care almost. That's what's underneath it, for me. (Interview 5)

In addition to their role in EDs' lived experiences, the core facets of rapport have also been mentioned in the scholarly literature. For example, Buskist and Saville (2001) describe rapport as "a positive emotional connection" between students and teachers, tied closely to the sharing of "at least part of one's self," "trust and respect, and a willingness to involve [the learner] in in the learning process" (para. 14). This section summarizes what the core facets of rapport are, as discussed by the EDs interviewed for this guide. Later chapters in the guide present strategies for building rapport (Chapter 4) and discussions of why rapport deeply influences the relationship between EDs and instructors (Chapter 2).

Trust

Trust was the most commonly mentioned core facet in the EDs' lived experiences (in 18 of the interviews). When referring to trust, EDs used phrases such as "a trust relationship" (Interview 7), "trust building" (Interview 2), and when the person can "trust me" and see that we "can be trusted" (Interview 14).

In the scholarly literature, trust is defined as "the process of holding certain, relevant, favourable perceptions of a person" (Wheeless & Grotz, 1977, p. 251), and between teachers and students as "the affective glue that binds educational relationships together" (Brookfield, 1990, p. 163). Brookfield also refers to trust as contributing to an atmosphere of openness, risk-taking, vulnerability, growth, and change. Similarly, one ED described the role of trust in the ED-instructor relationship as being central to the willingness to try:

> The most important is to build trust between the two of us…I had to come to a place where I truly understood what was behind the questions that they were asking me, and they had to come to a place where they trusted me enough that whatever I offered as advice would be meaningful and useful for them, and that they might have to be willing to try something out, or take a risk, or step beyond their boundaries. … And unless I could build trust with them and make them feel safe and that I truly had their best interests at heart, and that I understood them at a deep level, then anything I could offer would be only superficial and not really meaningful... (Interview 19)

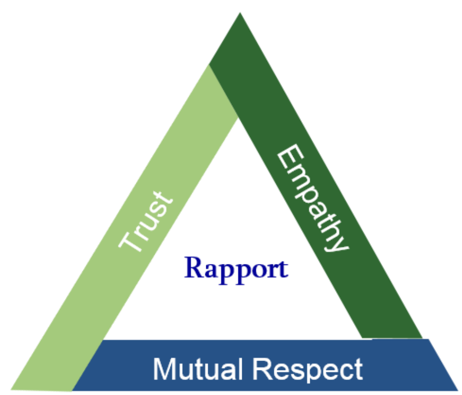
Individual perceptions of trust and its relationship to rapport varied across the EDs' lived experiences. Most EDs described trust as arising as an outcome of rapport rather than as an antecedent of rapport as positioned in the research of Granitz, Koernig, and Harich (2009).

Trust as an Outcome of Rapport - EDs described rapport as the precursor to and basis for establishing trust in comments such as

- "I think it's particularly significant that without some form of good rapport we can't necessarily establish confidence or trust, which I think is necessary to discuss some of the topics that would likely be coming up" (Interview 6);
- "You can have rapport as a precursor to trust" (Interview 9);
- "I think one of the things that rapport allows to begin to grow or continue to grow is trust" (Interview 10);
- "The purpose of personal rapport is that they feel comfort in talking to you, they feel that they can trust you, and so forth" (Interview 12); and
- "Why would that person trust me unless we have a rapport?" (Interview 16).

Trust as Part of the Rapport-Building Process - EDs also described trust as the part of the process of building connections, care, respect, openness, and comfort within a relationship:

- "It's about creating a feeling of connection with the other person and you would do this by showing that you understand what they're saying to you and that you can be trusted" (Interview 14);
- Rapport is "like this communication act that involves mutual trust and respect and care" (Interview 5); and
- "So in a relationship with faculty member or with whomever you are having a conversation with, it involves some trust. It involves a sense of comfort with sharing ideas with each other, openness, so trust is very important" (Interview 8).



Trust was also viewed as a means to gauge the existence of rapport, as this ED described: "Rapport…a section along the continuum of relationship building and trust, and so I would see rapport as being that state that you're beyond getting-to-know-you with someone and maybe not necessarily to the point of complete total mutual trust, and collegiality" (Interview 20). For further discussion on the indicators of rapport in a consultation, see Chapter 4.

Roots of Trust - Many EDs recognized that trust arises from being worthy of trust, of being "really open and listening and asking questions and just looking and sounding really open to whatever they tell you, then it allows them [to] feel like they can trust you and that you understand where they're coming from" (Interview 14). For at least two EDs, the key to trust was confidentiality: "My lips are sealed" (Interview 16) and "I wanted to create a bond and a link and a sense of mutual respect and trust with whomever I was working. A lot of our work as you know is certainly done in a confidential manner and milieu. I'm always cognizant of that because I want the relationship to be strong" (Interview 18). This sense of confidentiality and trust is required, according to Border (1997), for instructors to explore their teaching process.

Empathy

Empathy is another core facet of rapport recognized by EDs, though it was not as commonly mentioned in EDs' lived experiences as trust. This may be because EDs build empathy in different ways, and in that regard they also may not perceive empathy in the same way. In the scholarly literature, empathy is referred to as the ability to relate to a person and their situation without judgment and in a caring and respectful way (Norfolk, Birdi, & Walsh 2005; Rogers, 1975; Kalisch, 1973).

EDs spoke about empathy as creating an atmosphere of caring, respect, and/or non-judgment modelled to instructors through verbal and nonverbal forms of communication:

- Caring was described as feeling genuine empathy for the instructor or situation: “I don’t know if you can fake caring” (Interview 16).
- Respect was described in terms of valuing the instructor’s experiences and roles: “I build rapport is by making it really clear that I think their research is important, whatever it is...” (Interview 5).
- Non-judgment was expressed by ED as understanding contrasting perspectives and points of view: “Both sides. Both sides. You’ve gotta see both sides, and you’ve gotta explain the other side to the client. And you might have to counsel the client on how to explain her side to her students” (Interview 16).

Finally, respect, caring, and non-judgment were expressed through actions such as listening, asking questions, and adapting to instructor’s needs. For example, one interviewee noted

> I think there are times when I can point out certain concerns or issues that an instructor or faculty member or student may want to address. But I want it to be a place where we can sort of work through problems together. I need to really hear from them what it is they want to achieve and to discover so that we may think about together how we may create an interesting assignment for students, consider the development of a teaching dossier and seeing how we can refine it. I like to keep pushing back questions to them in a respectful kind of manner. (Interview 18)

Mutual Respect

EDs define *mutual respect* as the recognition of the expertise and knowledge that all parties bring (Ramsden, 2003; Rodabaugh, 1996). For instructors, there is the acknowledgement of both disciplinary (content) and pedagogical (how to teach within one’s discipline) expertise. EDs complementarily bring knowledge and skill sets related to their teaching and learning expertise. Mutual respect was described by one ED as

> Trying to develop a relationship where I was not always…perceived as the person who knew it all about teaching and learning…I want us to discover together so the person on the other side…realizes that I may have a certain expertise acquired in the area of teaching and learning …[yet] I believe they (faculty and instructors) are experts in their own right. I acknowledge that and I want to draw from them what they perceive may be something related to good practice … especially in terms of how they teach. And so, it’s creating that link between us, it’s a relationship that I value and that I hope that they value as well. (Interview 18)

This dual consideration of both the self and other is further explored in Chapter 4 and Chapter 6.

Rapport as a Process and Experience

EDs spoke of rapport both as a *process*, and as an experience (a *way of being*). The differences in how EDs describe rapport are part of its many complex variations. Figure 1.1 provides a visual representation of how the EDs see the process and experience of rapport differently.

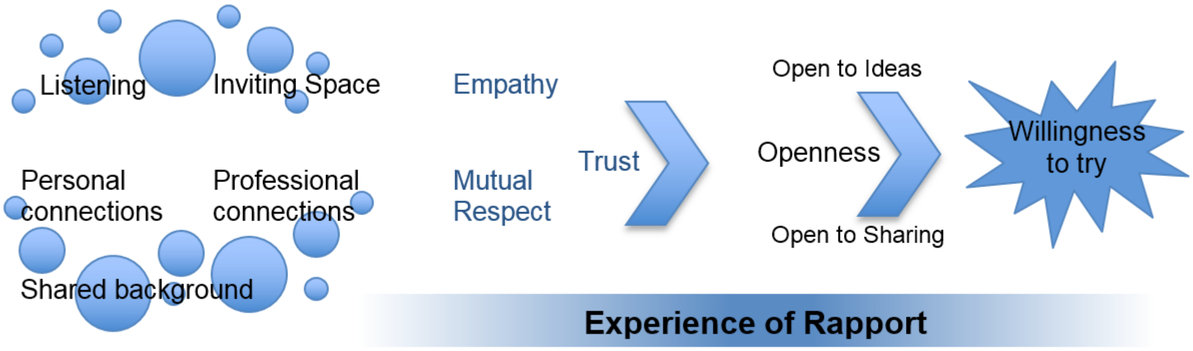


Figure 1.1: The Process of Rapport Building and Experience of Rapport

Buskist and Saville (2001), writing of teacher-student rapport in classrooms, described rapport as "both process and outcome. It is a process because it involves a series of steps a teacher takes that must occur for rapport to develop. It is an outcome because it emerges only when the appropriate components are present in teaching situations, leading to more effective teaching" (para. 13).

Rapport as a Process

EDs who describe rapport as a process see it as a series of steps across an evolving relationship rather than a single experience. As one ED noted

> It's more a process rather than a process and a product. So in a relationship with faculty member or with whomever you are having a conversation with, it involves some trust. It involves a sense of comfort with sharing ideas with each other, openness, as well as, so trust is very important. And some self-disclosure, but it's not necessarily important. So even if there's no great amount of self-disclosure there's a sense of comfort in sharing ideas and discussing them together and being open to them. (Interview 8)

The Steps of the Process of Building a Relationship

EDs defined each of the following steps as necessary to the process of building a relationship:

Empathy and Trust - "It's about creating a feeling of connection with the other person… by showing that you understand what they're saying to you and that you can be trusted…[being] empathetic… they've gotta feel like they can say anything to you about what's going on with their teaching" (Interview 14). Similarly, "They know somehow that they trust me and I trust them. So there's an element of trust, and an element of empathy. And it's got to be felt by them, that I feel empathy for them" (Interview 5).

Mutual Respect - "It starts with mutual respect on both sides, and… acknowledgement of expertise from both people. So that there's kind of a respect for the other person's knowledge. And…there's a willingness to listen by both people" (Interview 9).

Physical Space - "just being inviting, open, a lot of it even is just the way I organize my office, so when people come in I have chairs so I actually move my chair around to the other side" (Interview 4) and "I would design the space differently to enable that kind of interaction, arranging the furniture based on the goal" (Interview 19). And "the nonverbal things as well…the environment, your body language, your posture, your voice… play into the idea of building rapport" (Interview 4).

Honesty, Listening, Compassion - "I often find that when people consult with me … they come with their academic self. There's a lot of walls around that…they need that process to find their authentic self…to build rapport…[via] honesty, and respect, and trust…also listening, compassion …Partnership toward action.

So rapport building…[is] about a lot of conversation, but one of the things that I found in my education development practice is that it's really important to move on from listening and talking to action" (Interview 3).

Shared Backgrounds/Interests - "Educational developers can also build on experiences or backgrounds they have in common, including disciplinary backgrounds or maybe we connect because we have a similar background or something similar in our backgrounds, or maybe we both have kids, or teenaged kids…it can take different forms depending on the person" (Interview 9).

By seeing rapport as a process, some EDs saw rapport not as the end-goal or outcome, but as a journey toward change or action. These EDs saw rapport as a gateway leading to a greater "openness for sharing" (Interview 6), "being open and real" (Interview 7), and an "openness to sharing problems" (Interview 14). One ED described the journey towards openness as "Developing a sense of a comfortable space to open up the floor to conversation and dialogue. So that we can have a candid conversation wherever the person I'm meeting with wants to take it" (Interview 11).

Seeing rapport as a process also allows instructors to "engage in problem solving and the risk-taking of trying something new or challenging in their teaching" (Interview 19) and it "creates the space for growth to occur" (Interview 7).

Rapport as an Experience or Way of Being

Among EDs, rapport is also seen as an experience and as a sense of being within trusting and respectful relationships. These relationships are defined in the scholarly literature as "positive social relationship(s) characterized by mutual trust and emotional affinity" (Nguyen, 2007, p. 286). Rapport as an experience or way of being relates to the quality of the working relationship or experience (Lescher, n.d). It was defined in the lived experiences of these EDs: "Rapport is the relationship that you build with the person that you're working with" (Interview 13); "a definition for me would probably be…the relationship or the interpersonal state of understanding" (Interview 6); and "Rapport is to me a productive and rewarding relationship" (Interview 16).

When described as an experience or way of being, rapport "is truly relationship-centred" and captures "what is experienced in an interpersonal relationship" (Frisby & Martin, 2010, p. 147). One ED also described this relationship-centred experience: "what it feels like to me is ease and comfort and understanding… being in the same place, so that you can connect at a deeper level. No tension, but total attention, being in the moment. That's what rapport feels like to me. That I'm completely with the other person, that we are in agreement, congruent…I am able to pay my complete attention to their experience, what they're expressing, what I'm receiving about them...Be completely with them. That's what it feels like to me" (Interview 19).

Travelbee (1963) defined rapport as "a particular way in which we perceive and relate to our fellow human beings. It is composed of a cluster of inter-related thoughts and feelings; interest in, and concern for, others: empathy, compassion, and sympathy; a non-judgmental attitude, and respect for each individual as a unique human being. Rapport is also characterized by the ability to translate those feelings and attitudes into intelligent and creative action, to communicate them to another in both verbal and nonverbal ways" (p. 70). Rapport is thus seen as way of relating and being present (Rogers, 1980), not an instrumental step in a process: "It is something that is there and very much present and people are aware of it, but we don't talk about. 'So, we've established rapport, and now we can go on to the consultation'; that's probably the last thing… I would say. So I very much see it as more like recognition, it's comfort, it's support, it needs no explanation" (Interview 10).

Shifts in how EDs see rapport as an experience and way of being is explored further in Chapter 6 as part of the transformative growth across EDs' careers.

Reflection Point

- What experiences do I have in building rapport that relate to the core facets trust, empathy, and mutual respect described in this section?

Variations in Rapport

A prevailing theme of this chapter has been that rapport varies; it "look[s] different with different instructors… different purposes and so forth" (Interview 18). Many EDs explain from their lived experiences that rapport "depends on who I'm working with and what the focus is" (Interview 3) and "is very context dependent, so depending on why I'm using rapport and when you're using it…it'll be dramatically different" (Interview 12). Later in this guide, Chapter 3 focuses on how rapport varies within the broader context and culture of educational development.

Our values and our educational development philosophy shapes rapport. Our beliefs about people in general and about the faculty, graduate students, instructors, sessional teachers, and colleagues we consult with will shape the rapport we build. For example, within the profession of nursing, rapport "is extricably tied up with how the nurse conceives of human beings, because her basic beliefs in this respect—what she really believes, not what she professes to believe—will determine her relationship with others" (Travelbee, 1963, p. 70). EDs are similarly shaped by their beliefs about their role and about those they work with. Different EDs connect in different ways, and can build rapport with different people, so "someone that I might not find really good at building rapport, they may be able with a different person. The way they connect with them might work" (Interview 4).

Sometimes an ED's vision for their role differs from what instructors or others expect, which can further shape the way that rapport is built:

> Sometimes they want me to be an expert. Because in their professional lives if they don't have an answer they go to an expert. And so we're the experts, so they come to us and they just put all their trust in us to expertly fix their course or something. That's not my approach…so that sometimes causes the failure of rapport because they expect me to be something that I can't be. (Interview 5)

In this next section, we'll explore the different ways that EDs can connect with instructors through either shared personal or professional experiences or both. As an ED, you might discover that you prefer initiating rapport in one way, or that you use different ways given the situation or context. In the end, this is an example of the many ways that rapport varies within our profession.

Establishing Personal and Professional Connections

EDs who were interviewed for this guide described building connections with instructors through personal experiences (e.g., discussing family life or shared interests) or professional connections (e.g., discussing common challenges, drawing upon similar teaching experiences, experiences with the demands of faculty responsibilities). Both personal and professional experiences and connections were noted as important and valued in different situations, though the preferred approach varied across EDs.

> Consider Case #1: How was rapport built? How would you build rapport and would the connections you establish be more personal or more professional?

One way EDs can build connections is based on professional experiences: "I build connection by talking about shared experiences… So I would talk about my own experiences as a teacher. We can relate to each other through our teaching experiences…I can immediately strike up a kind of empathetic view of the struggles of being a teacher" (Interview 5). In addition, some EDs used small talk to establish a point of connection in situations where they were unable to relate to instructors through shared teaching experiences: "I don't know what to call it, small talk skills. Also helps in situations where I actually don't have much connection with their particular teaching situation. Like say they've only ever taught online. Well, I've taught a little bit online, but I also have a lot of teaching—I don't know. Say it seems a little incompatible then I'll find some other way to connect with it" (Interview 5).

> "We talked about our professional experience and we talked about our personal lives. And I think it's important to have both of those pieces in any relationship that you have with people with whom you're working because it's important to have that, to be able to relate to each other as human beings first, and to understand that we are all learning…respect has to occur between two people so that they understand that both people have something to learn in a professional relationship it's a give and a take on both ends" (Interview 13).

EDs saw balancing both personal and professional connections as important (Interview 13), with preferences varying across a spectrum for individual EDs. Some EDs described starting a consultation with personal connections as a foundation for building professional relationship, and then moved into connecting based on "a similar background" (Interview 9). Connecting personally early on was intended to "humanize us" (Interview 13), to "spark conversation," or "find out a little bit about [instructors]…[to] have that sort of more personal connection… lead[ing] to greater comfort and willingness to open and share what they're doing in their courses" (Interview 4).

Balancing how much is shared personally and professionally depends on your philosophy and approach as an ED. Though EDs still need to be aware of the needs of the instructors with whom they are working, especially when instructors come with professional-focused goals. For example, as this ED described, "When we're talking about the rapport building, there is a fine balance between… personal connections, but then also getting on with things so that people feel that their time is well used" (Interview 9). Similarly, another ED described this concern in another way: "people will come in [with]… a mechanical problem, and if you get too much into the small talk and the rapport…they perceive you as a fluffy person…So I find that I have to be very careful" (Interview 12). For some the balance is more a matter of personal comfort:

> I don't get personal with people, but acknowledge that people have lives outside of their work and talk about things like family or whatever can help to develop rapport, so it can kind of take different forms, depending on the person. Once you understand what's important to them and how they relate to people. (Interview 9)

Reflection Point

- What is my educational development philosophy? How do my past experiences, beliefs, and values shape the way I see rapport? Do I see rapport primarily as a process or experience (way of being)?
- How do I approach rapport-building? For instance, in what contexts do I tend to build connections personally versus professionally? Do I feel comfortable being able to do both?

Summary

In this chapter, we have presented a collective definition of rapport that is based on the scholarly literature and lived experiences of EDs who were interviewed for this guide:

> Rapport is the process or experience by which individuals or teams of EDs and instructors build a mutually positive connection, relationship, or shared understanding with one another in an atmosphere that is conducive to reciprocal trust, empathy, respect, openness, growth, and change.

A prevailing theme has been how rapport is multifaceted and how it varies across different contexts and careers, thus shaping how individuals build, define, and reflect on rapport. Even within the field of educational development, rapport is defined and perceived by colleagues quite differently. For example, some EDs see rapport as a process while other EDs see rapport as an experience or way of being. While many EDs draw upon personal experiences to build rapport, meaningful connections can also be established through professional connections, depending on the individuals and the context of the situation at hand. This theme of the variability of rapport will continue to be explored in new ways throughout the remainder of this guide.

Recommended Resources

Granitz, N.A., Koernig, S.K., and Harich, K.R. (2009). Now it's personal: Antecedents and outcomes of rapport between business faculty and their students. *Journal of Marketing Education, 31*(1), 52-6.

- These authors offer an analytical research approach for describing and studying rapport within a higher educational context. Their specific approach of surveys may not directly apply in most educational development contexts, though the ordering and grouping of ideas provides some insights.

Travelbee, J. (1963). What do we mean by rapport? *American Journal of Nursing, 63*(2), 70-72.

- This author explores the meaning behind rapport in a nursing context. The basic ingredients of rapport and the role of emotional involvement in rapport building are discussed.

Chapter 2

Rhetorical Insight into the Role of Rapport in Consultations

Kim West, Rebekah Bennetch, and Tereigh Ewert-Bauer

Introduction

In Chapter 1, the core facets of rapport in educational development were discussed: trust, empathy, and mutual respect. In this chapter, we explore the following questions: Why is building rapport important? And what does positive rapport accomplish?

This chapter situates rapport as a critical foundation in educational development. Rapport supports instructors in "enhancing teaching" (Amundsen & Wilson, 2012; p. 90) and on a broader scale, it helps "colleges and universities [to] function effectively as teaching and learning communities" (Felten, Kalish, Pingree, & Plank, 2007, p. 93).

For novice EDs, the chapter provides an overview of the outcomes and impact of rapport during individual ED-instructor consultations. For intermediate and more experienced EDs, the chapter provides an opportunity to think more critically about when and why to build rapport.

We draw upon the discipline of rhetoric as one possible framework to understand the impact of rapport. Rhetoric—the study of persuasion—is a practice that has existed in the Western tradition for over 2500 years. Its roots trace to Aristotle, who defined the discipline as a way of discovering "in any given case the available means of persuasion." Rhetoric involves a speaker developing and adapting a message with the intent to influence or persuade an audience. Using the framework in Lloyd F. Bitzer's article, "The Rhetorical Situation" (1968), and quotations from EDs (see the Introduction to this guide), we discuss how to build relationships, agency, and other rapport-building actions, and consider the interplay of cultural and other constraints of rapport building during consultations.

Chapter Learning Outcomes

By the end of this chapter, readers should be able to:

- Explain the three constituents of "The Rhetorical Situation" and how they align with the different parts of a consultation;
- Discuss actions that EDs can take to determine the exigence of a consultation and build relationships with instructors;
- Recognize the role of trust and emotions when helping instructors to develop agency and when supporting risk-taking in instructional practices; and
- Consider how cultural and other constraints affect rapport-building during consultations.

Rapport and The Rhetorical Situation

Bitzer first describes "The Rhetorical Situation" in his 1968 article. Like Aristotle, Bitzer views rhetoric as a communication tool to persuade or motivate an audience "ultimately to produce action or change in the world" (p. 3). Rhetoric functions to influence and evoke change in the minds of the audience "through the mediation of [their] thought and action" (p. 3). Bitzer further notes that a rhetorical situation "invites a *fitting* response, a response that fits the situation" (p. 9). Likewise, much of an ED's work involves the process of persuasion, particularly when helping instructors to acknowledge and adjust any ineffective patterns in the classroom.

Bitzer breaks his "theory of situation" into three parts: "exigence," "rhetorical audience," and "constraints" (p. 6). These three components often align with the different stages of a consultation. After first defining each of these rhetorical terms, we use Bitzer's model as a framework to discuss some actions that EDs can take to build rapport with instructors within each of these constituents and why these actions are significant.

As you read this chapter, please keep in mind that the individual contexts in which you are building or sustaining rapport with instructors or groups (see Chapter 5) will differ; our discussions throughout this chapter will explore the dynamics of rapport in the context of Case #2: Unexpected Clash. One ED noted that "The relevance of rapport generally is very context dependent. So…depending on why I'm using rapport and when you're using it for what end, it'll be dramatically different" (Interview 12).

Constituent 1: Exigence

The first part of assessing the situational context is to determine what Bitzer identifies as the exigence. Simply defined, this term may mean a challenge or dilemma that the instructor is facing in their practice. An exigence is what first prompts an instructor to meet with an ED. Bitzer describes an exigence as "an imperfection marked by urgency; it is a defect, an obstacle, something waiting to be done, a thing which is other than it should be" (p. 6). For example, there may be "something waiting to be done" (Bitzer, 1968) by the instructor and the consultation then becomes an opportunity for an ED to facilitate change.

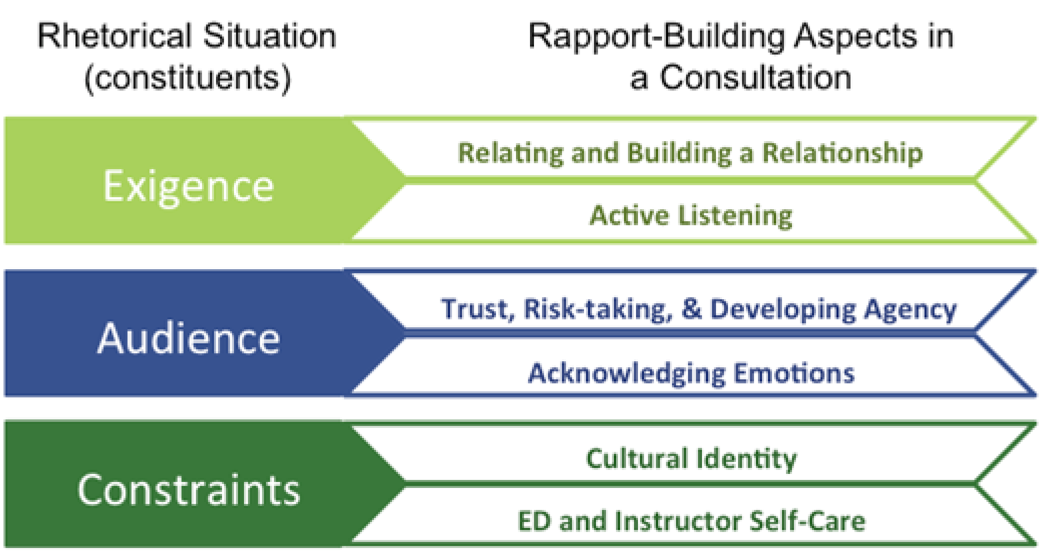


Figure 2.1: Rapport building within the rhetorical situation (adapted from Bitzer, 1968)

Relating and Building a Relationship

One way an ED can begin to determine the exigence within a consultation is through relating. Relating is the foundation of building a relationship with an instructor. When an instructor first comes through our door, our primary concern is not the "issue," but rather the person and starting to build a relationship with them. Indeed, as this ED emphasizes, "you can't disconnect the human person from the thing that they're coming to talk to you about or ask you about" (Interview 1).

How you build a relationship and develop rapport with an instructor depends on contextual and other factors. First, the ED usually develops an initial personal or professional connection with the instructor, by, for example, drawing on personal experiences or discussing a common challenge (see Chapter 1, Establishing Personal and Professional Connections). Brown (2010) defines connection as "the energy that exists between people when they feel seen, heard, and valued; when they can give and receive without judgment; and when they derive sustenance and strength from the relationship" (p. 19). Other strategies for relating are listening, being genuine, demonstrating interest, being enthusiastic, and expressing care without judging (empathy). These and other strategies are further discussed in this chapter and Chapter 4 (Moment 2- Welcoming the Instructor). For some EDs, relating is more of an implicit rather than explicit process: as one ED noted, rapport is "very instinctual for me. In fact when I'm working with people, I try to model a connection, or try to be as genuine, as present with them as possible. And that means caring [about] where they're at" (Interview 5). Take time to define what philosophy, strategies, and approaches work for you in terms of building relationships with instructors. This is an ongoing reflective scholarly practice, and one step toward making the process of rapport building more explicit (see Chapter 7).

Relating to instructors is important because it helps EDs to personalize the support for that instructor: "I find [what rapport building] allows me to do is to tailor the stuff that I know to the individual person, the situation, the teaching context, all of those things" (Interview 3). Favourable relations between EDs and instructors may also help to create a sense of comfort and ease during the consultation:

> I guess it's nice when people remember things about you or have that sort of more personal connection. So it does I think sometimes make you more open and wanting to chat and sort of more, more of that trust, or kind of mutual trust... And it's almost in a friendship in a way too, like I get to know them and then they're a little bit more comfortable. (Interview 4)

These relational interactions are often the starting point of longer-lasting professional relationships and even personal friendships. A sense of comfort and ease at the beginning of a consultation also helps in creating a safe space where trust (discussed later in this chapter) can eventually develop between ED and instructor.

Statements such as "I hear where you are coming from" and "That sounds like a challenging situation" help EDs to convey that they relate to the instructor's experiences and that they care about and respect the instructor. Conveyed in a non-judgmental way, this is *empathy* (Kalisch, 1973; Norfolk, Birdi, & Walsh, 2007; Rogers, 1975; also see Chapter 1). Empathy builds trust and openness so that instructors feel safe enough to disclose information about the deeper nature of their situation. A mutual understanding created through empathy or by relating to the instructor in other ways helps to foster trust. One ED reflected that

> I had to come to a place where I truly understood what was behind the questions that they were asking me, and they had to come to a place where they trusted me enough that whatever I offered as advice would be meaningful and useful for them, and that they might…be willing to try something out, or take a risk, or step beyond their boundaries. (Interview 19)

As an ED, developing relationships with instructors is important because relationships create meaningful and long-lasting endeavours: "It's so rewarding over time to build up relationships to people and with people, and see them succeed over time. I think it's one of the best parts of my job" (Interview 3).

Active Listening

In *The Courage to Teach*, Palmer (2010) stated, “The way we diagnose our students’ condition will determine the kind of remedy we offer” (p. 41). What if we applied this statement to the situational context of a consultation with instructors? What assumptions do EDs make about the instructors who walk through their doors? How do these assumptions then shape the way an ED diagnoses the exigence or reason behind a consultation?

Active listening is “the act of mindfully hearing and attempting to comprehend the meaning of words spoken by another in conversation or speech” (BusinessDictionary.com). Through active listening, an ED begins the process of listening and interpreting the meaning of what is communicated, verbally and non-verbally, by the instructor. This requires a delicate balance: rather than making assumptions, EDs instead need to ask insightful (and reflective) questions to clarify information and grasp the actual issue(s). Active listening is important because it can take considerable time and effort to determine underlying issues. Finding the exigence is rarely straightforward or simple. One interviewee expressed “that when they [instructors] come in to see me they think it’s just going to be: ‘K, here’s the problem,’ and I say ‘ok, here’s the solution,’ and then they go ‘ok, bye.’ And of course it’s not that simple. Right? So there’s many layers on it” (Interview 1).

Returning to our framework, at the beginning of a consultation, the ED may assume they know or understand the instructor’s goals, needs, and/or situation. Possibly, EDs may assume that the instructor is voluntarily seeking the consultation, without recognizing that other political, institutional, or social factors might be at play. For example, in Case #2, this type of assumption may have contributed to the instructor (Cecilia) abruptly terminating the conversation with the ED (Paulo). The instructor’s overt aggressiveness could also indicate that there may be other exigences to be considered. In another instance, imagine that the instructor is very quiet and does not make eye contact during the consultation. What is the true source of the issue? The surface-level issues may be what initially bring an instructor in for an appointment, but it might not be the actual issue (or what Bitzer calls the “imperfection marked by urgency”) that needs to be addressed. Therefore, EDs also need to consider whether an instructor is seeking a consultation voluntarily, or if they have been directed to the ED by a supervisor. The answer will have a significant impact on the uncovering of the exigence, on the process, and on the relationship building. More contexts and strategies for active listening are discussed in Chapter 4, Moment 3, Exploring through active listening.

There is often more than one influencing issue, including politics, conflict, and extrinsic motivational factors. In multifaceted contexts, determining the exigence may be more challenging, requiring active listening skills. This ED describes that building rapport is much easier “if [instructors have] come here on their own accord and they have a particular interest...then the rapport starts kind of almost like at a later stage because we already have a shared kind of common place to start from” (Interview 2).

Determining the exigence of a consultation is more likely when adopting a not-knowing stance. Anderson and Goolishian (1992) define this phrase as an attitude or actions that “express a need to know more about what is said, rather than convey preconceived opinions and notions about the client, the problem, or what must be changed” (p. 29). For example, in Case #2, the introduction hints at some of the ED’s preconceptions, suggesting that Paulo may have had some preconceived ideas about the direction that the consultation should take. Anderson and Goolishian suggest this approach is about adopting a genuine curiosity combined with EDs asking instructors questions and employing active listening. In contrast, in “Pedagogy of the Distressed,” Jane Tompkins (1990) explains the risk of a “knowing stance” in the classroom:

> [I had an] obsession with…(a) showing students how smart I was; b) showing them how knowledgeable I was; and c) showing them how well-prepared I was for the class. I had been putting on a performance whose true goal was not to help the students learn but to act in such a way they would have a good opinion of me. (p. 28)

If an ED focuses too much on a “knowing stance,” they risk losing rapport with the instructor, or the ED may entirely miss the exigence of the consultation.

Given some of our discussions thus far on active listening and adopting a “not-knowing stance,” how would you ask questions to determine the exigence of the consultation in Case #2? Are there some other precipitating factors that might have led to the consultation in this case study? Begin with two potential exigences from this case study:

- Student comments from evaluations—“[they] don’t like the way I respond to questions,” and,
- Encouragement for assistance—“my Department Head recommended that I speak to someone here.”

Reflection Point

- Are there any other potential exigences evident in Case #2?
- What other active listening and relationship-building strategies could Paulo have used in this case?
- What assumptions could EDs make about the instructor or situation when determining the exigence of a consultation?

Constituent 2: Rhetorical Audience

The second constituent of the rhetorical situation, a rhetorical audience, is distinguished from an everyday or unspecified audience, because it “consist[s] only of those persons who are capable of being influenced by discourse and of being mediators of change” (p. 7). Bitzer described a rhetorical audience as one whose goal is to modify whatever problem, or exigence, the speaker sets before them. Another facet that distinguishes a rhetorical audience is an openness to their being “influenced by discourse,” or being receptive to the speaker’s message. For example, in Case #2, the rhetorical audience is Cecilia, the instructor who is seeking help to change the dynamics in her classroom. She is the only person who can address the issue (or exigence). Cecilia’s Department Head would NOT be a rhetorical audience, as they would not be able to affect the necessary changes that need to take place.

Trust, Risk-Taking, and Developing Agency

Generating trust is instrumental in creating a safe space in which instructors can be open and embrace growth and change. In an ED/instructor relationship, “trust involves a sense of comfort with sharing ideas with each other, openness” (Interview 8). In spaces of trust, instructors can alter teaching and learning practices, or shift their mindsets or actions to be more inclusive in relation to cultural or institutional paradigms. Mezirow (2003) called these shifts “transformative learning” (p. 58). Transformative learning requires instructors to critically analyze their values or assumptions in their teaching practice. These types of transformative shifts take time and do not happen readily, comfortably, or easily. When they do occur, these shifts require a deep level of trust and understanding between the ED and instructor: “I don’t think that you can support and facilitate growth in teaching practice if you don’t have a relationship of trust” (Interview 7).

Part of the rapport-building process is to empower instructors to feel like the mediators of change in their classrooms, addressing their exigence(s). The relationship between agency—or the capacity to act in a specific direction or way—and risk-taking, is described by this ED:

> Because most often as an educational developer…they were coming to me to try and move in a different direction, or move forward or to expand, or challenge themselves, or solve a problem. And all of those things are risky. And unless I could […] build trust with them and make them feel safe and that I truly had their best interests at heart, and that I understood them at a deep level, then anything I could offer would be only superficial and not really meaningful. (Interview 19)

Trust is essential to doing the real work of a consultation, and thus, is a critical mediating factor in resolving the exigence. Feltman (2008) describes trust as “choosing to risk making something you value vulnerable to another person’s actions” (p. 198). Learning involves this type of risk, as this ED observed: ”I think if you want people to either learn in a kind of consultation situation, or make change…you need to build trust with people…I just see it as foundational to doing any work” (Interview 9).

Trust builds agency because instructors will reveal their teaching identities to EDs, and these identities are comprised of deeply held beliefs such as integrity, emotional self, agency, and perceptions of competence (Zembylas, 2003). EDs need to recognize that teachers are in positions of vulnerability because they feel that their teaching identities are laid bare for EDs to critique, judge, or evaluate. Zembylas (2003) wrote, “Teachers have to take profound personal and professional risks in their everyday teaching practices, and they need to construct defense and support mechanisms to continuously re-construct and re-affirm their identities. Feeling inadequate may color a teacher’s entire emotional life” (p. 223). Interpersonal risks are inherent in the consultation process, and thus are important for EDs to recognize, respect, and validate. Alternatively, as an ED noted, trust and risk-taking pose important opportunities for transformational learning and growth: “I think it kind of allows us to do deeper work. It allows us to go to areas that we aren’t confident in, and explore things that we don’t know how they’re going to turn out. I, I think that […] there has to be a certain amount of trust with the people you work with to take risks” (Interview 20).

Let’s look back to some of the preconceptions that were hinted at in Case #2 and how these could relate to the themes of trust and vulnerability. In the case, Cecilia is introduced as “a very experienced and opinionated instructor”—these characteristics may influence the situational context of the consultation. If Paulo perceives Cecilia to be “opinionated” at the start of a consultation, will this influence how Paulo relates to Cecilia and ultimately how rapport develops and evolves during this situation? Building agency requires an ED to use empathy, rather than judgment, to seek a deeper understanding about an instructor, while respecting his/her teaching identity and vulnerabilities. Another consideration is to recognize the role of emotion in this situation, which we will examine next.

Acknowledging Emotions

In the Western academic tradition, rational thinking is exalted, and emotions are often dismissed as antithetical to objective thinking. Challenging this dichotomy in consultative work, EDs need to embrace a more holistic approach that considers the role of emotions as they affect and even complement rational thinking. Gould (2002) suggested “when feelings are excluded, rational and moral judgment can become distorted” (p. 9). If the goal of EDs is to mediate change when working with instructors, then Zembylas (2003) also urged academics to consider emotions to be: “a significant part of the inscription of the body and of the possibility of self-transformation” (p. 228). Further, Lawson (2002) wrote,

> The limbic system interprets and directs emotion and behavior. Priscilla Vail has described emotion as the “on-off switch to learning”. According to Ms. Vail, when the switch is off, the system is dormant and only the potential for learning is available. When the switch is on, the pathway to learning is open… and the more positive the learner’s memories and reaction to the event (emotional state), the better the learning will be. Research has shown that happiness has a positive effect on learning, memory and social behavior. Conversely, negative emotional states, such as anger and sadness, have been shown to have a negative impact on learning and motivation. (para. 2)

However, in some cases negative emotions might also have a positive effect if they are part of the growth process. Palmer (2010) wrote,

> Fear can also be healthy. Fear I am teaching poorly may not be a sign of failure but evidence that I care about my craft. My fear of teaching at the dangerous intersection of the personal and the public may not be cowardice but confirmation that I am taking the risks that good teaching requires. (p. 39)

Instructors may be afraid of many things: of not understanding, failing, or having their ignorance or inadequacies exposed (Palmer, 2010). For this reason, EDs must demonstrate empathy for instructors' experiences. In harmony with empathy, Mary Rose O'Reilley's writing brings us back to active listening:

> Attention: deep listening. People are dying in spirit for lack of it. In academic culture most listening is critical listening. We tend to pay attention only long enough to develop a counterargument; we critique the student's or the colleague's ideas; we mentally grade and pigeonhole each other. In society at large, people often listen with an agenda, to sell or petition or seduce. Seldom is there a deep, openhearted, un-judging reception of the other. And so we all talk louder and more stridently and with a terrible desperation. By contrast, if someone truly listens to me, my spirit begins to expand. (1998, p. 19)

At the right moment, EDs can help instructors acknowledge and discuss any fear that is rooted in uncertainty or insecurities. One ED observed that "It's always struck me as kind of odd—working with people in the academic community, who are very smart people who have accomplished a whole heck of a lot of stuff, and yet there's often this, this sense of vulnerability or uncertainty, or some people even...of that imposter syndrome thing" (Interview 3). Failing to embrace these moments of vulnerability could result in an even greater disconnect for the instructor after the consultation if they choose not to be vulnerable, and rather, to hide their true self from others in future situations. Again, from Palmer (2009): "[we are] afraid that our inner light will be extinguished, [and] we hide our true identities from each other...We end up living divided lives, so far removed from the truth we hold within that we cannot know the integrity that comes from being what you are" (p. 4).

Another emotion, that of "feeling inadequate" (Zembylas, 2003, p. 223), also has a profound impact on a teacher's emotional state. This ED intuits,

> when they're [instructors] moving from vulnerability, or fear, or apprehension toward risk-taking, there's something about the building of that relationship and building that rapport knowing that someone's kind of supporting them, and cheering them on, and helping, then they've got that human resource. That builds their confidence… (Interview 3)

Reflection Point

- In Case #2, Cecilia is described as "a very experienced and opinionated instructor." How might these personal qualities shape the interaction with Paulo?
- Clearly there is mistrust at the beginning of the consultation described in Case #2. Is it possible that Paulo could have done things differently to gain Cecilia's trust? If yes, what could he have done? If no, what does this mean for the outcome of the consultation?
- What role do Cecilia's negative emotions play in this consultation? If you were Paulo, how would you have responded in this scenario?

Constituent 3: Constraints

The final element of the rhetorical situation is what Bitzer (1968) describes as "a set of *constraints* made up of persons, events, objects, and relations which are parts of the situation because they have the power to constrain decision and action needed to modify the exigence" (p. 8). In terms of the rhetorical situation, constraints are those elements that can shape an ED's approach during a consultation; they include "beliefs, attitudes, documents, facts, traditions, images, interests, motives, and the like" (Bitzer, 1968, p. 8). He further divides constraints into situational elements that are connected to the speaker and ones that are influenced by the context. For the purposes of our discussion, we will focus on two examples of constraints affected by the context, and in turn also affect the context: cultural identity and self-care.

Cultural Identity

As in any relationship, awareness and respect of each party's cultural identities contributes to rapport.

Interpersonal relations, including the ways that people send, receive, and interpret messages depends on their language and culture (Spencer-Oatey, 2000). For this reason, instructors' conventions of rapport in their culture may differ from the predominant Western value systems, cultural beliefs, behaviours, assumptions, and expectations for interactions and communications with others. These might include factors such as gender, context, notions of authority, perceptions of time, saving "face," or direct or indirect communication types.

However, cultural aspects of self are so often ignored in Western post-secondary institutions. In the context of teaching, McBride (n.d.) cites two reasons why acknowledging cultural identity between instructors and students is important:

- "Students need to feel respected, celebrated, and safe… [and] feel their voice is heard and appreciated" (Marulis, 2000, p. 27). Without recognizing students' cultural and other identities, students may not feel that they have a voice, nor might they feel that they can see themselves in their formal learning.
- Professors need to adopt a "non-knowing" stance (Anderson & Goolishian, 1992). From the not-knowing stance, we accept that we do not and can not know someone before investing time in getting to learn about them. We avoid assumptions, judgments, and pre-determinations. This requires humility and gentle curiosity.

Thus, failing to relate to a person's cultural identity could potentially be very detrimental to establishing rapport. By employing the not-knowing stance, EDs can potentially gain insight into an instructor's identity. McBride (n.d.) suggests that she can be more culturally sensitive to her students' needs and worldviews. She also provides examples of how to successfully get to know her students' cultural identities that can be adapted for an educational development context. Some of her strategies include asking getting-to-know-you questions, minimizing language barriers, and learning from students. By adapting McBride's suggestions to an educational development context, EDs can be more culturally sensitive to instructors' needs, approaches, beliefs, and worldviews.

Self-Care

At the beginning of this chapter, we defined rapport as a critical foundation in educational development. EDs need to acknowledge the emotions of and have empathy for instructors, but if they do not show themselves the same compassions, they risk becoming frustrated and angry with the instructors or institutions with whom they work. Edelwich and Brodsky (1980) define four stages of burnout that are common in the helping professions: enthusiasm, stagnation, frustration, and apathy. Trescott and Alt (2016) offer "habits to cultivate" while discussing the importance of self-care, which is often discarded as the antithesis of a strong Western work ethic. They, too, cite Palmer's (2000) work: "Self-care is never a selfish act—it is simply good stewardship of the only gift I have, the gift I was out on Earth to offer others. Anytime we can listen to true self and give the care it requires, we do it not only for ourselves, but for the many others whose lives we touch" (p. 30).

Rapport building can be an exhausting process, particularly for novice EDs and/or EDs who may have several consultations in a day. To be "present," exercise active learning, attend to all the nonverbal communication, constantly adjust and re-adjust their approach, and try to best understand and then support an instructor's needs, the ED exerts a tremendous amount of mental and emotional energy. Without self-care, EDs' energies become depleted and they are less able to give the gift of good rapport.

Reflection Point

- In what ways could Paulo have helped Cecilia to feel "respected, celebrated, and safe… [and] feel [her] voice [was] heard and appreciated" (Marulis, 2000; p. 27)?
- What are some of the ways that rapport could look different from one culture to another?
- What are some ways that you demonstrate self-care for yourself as an ED? How do you model self-care for others?

Conclusion

Using the rhetorical situation as a framework, this chapter has applied it to Case #2: Unexpected Clash, and other examples, to better understand why rapport building is vital in educational development. The framework helps us to identify three constituents in an educational development consult: the issue brought forth by the instructor (exigence), the instructor themselves and their preparedness for change (rhetorical audience), and factors that may hinder or simply affect the process and outcome of the consultation (constraints). There are several reasons why developing rapport with an instructor promotes reflection, learning, risk-taking, and transformation. Viewing the consultation holistically, we work with the instructor as a person, rather than working with only the instructor's issue. By engaging in actions such as making connections, being empathetic, assuming a "not-knowing" stance, developing trust, and employing active listening, we best position the instructor for change, because the positive emotions that these practices generate significantly enhance the learning potential. Positive emotions have tremendous bearing on an instructor's psychological, chemical, and for some, spiritual state of being, and thus, on their willingness and ability to work most effectively with an ED. Feeling heard, seen, supported, and validated, combined with a sense of empowerment, could possibly be one of the most meaningful reasons to hone our skills as EDs to develop rapport with an instructor.

Chapter 3
Factors Influencing Rapport Building: Culture and Context

Mary Wilson

Learning about teaching is more effective if it is situated and contextualized. (Weston & McAlpine, 1999, p. 88)

Introduction

As one walks the wide pathways of a CEGEP, college, or university campus, past the buildings filled with offices, labs, lecture theatres, and classrooms, past the libraries and the student centres, past the signs advertising varsity athletics and club events, readings and talks, plays and concerts, parties, alumni gatherings, and textbook exchanges, it is quite easy to find a great deal of commonality across our institutions. The flow of campus life, punctuated as it is by the cycles of the term or semester system, by the rituals of induction, graduation, and convocation, and by the rhythms associated by the activities of teaching, learning, and research, is largely common across the post-secondary sector.

These commonalities in physical and organizational structures and in activities shape our daily work as EDs and form the environments in which we support improvements in teaching, learning, and curriculum. These commonalities also create the foundation upon which we as EDs can generate and disseminate shared professional practices that are conducive to building the empathy, trust, and understanding that is so important to establishing effective consultative relationships with the instructors on our campuses. The colleges and universities that we work within are similar enough for us to be confident that we can share practices and learn from each other as EDs, but also unique enough that we benefit from an appreciation of the nuanced cultures and contexts of our institutions to inform our approaches to building rapport with the instructors that we work with daily.

Certainly, consultations matter as a means of supporting instructors in advancing their teaching practices. Finelli et al. (2008) noted that “faculty development scholars assert that ‘instructional consultation is the most promising way of fundamentally changing post-secondary teaching’ (Brentio, 1997, vii) and ‘the best way to instill lasting commitment to and change in a faculty member’s teaching’ (Lewis and Povlacs, 2001, iii)”

Chapter Learning Outcomes

By the end of this chapter, readers should be able to:

- A more critical understanding of the influences of culture and context on rapport building; and
- A deeper familiarity with practical strategies for assessing culture and context using guiding questions organized by lenses of analysis.

(p. 397). Similarly, evidence provided throughout this guide shows that consultation is an effective tool in educational development and there is much that we can learn from one another and apply broadly. However, ultimately, rapport is built in context and the proceeds of our consultations with instructors are applied in context, so it is valuable for EDs to examine the conditions under which our application of common approaches will benefit from critical consideration of their situational use.

The situation of the individuals who are building rapport—the relative nature of their roles, responsibilities, experiences, authority, and access to power—may shape the nature of the relationship. For example, it might make a difference if the ED is embedded in the department within which the faculty member is seeking tenure, rather than located within a centralized teaching centre that serves the entire institution, or if the ED is just embarking upon their career and working with a long-standing member of faculty. It might matter that the ED works within or outside of the scholarly discipline of the instructor with whom they are working. It may matter whether or not the ED is deemed to be an active scholar and educator. The perceived legitimacy of the ED, specifically their ability to understand faculty members' daily lived experiences, may be influenced by how neutral and external, or how experienced and internal, they are thought to be. The building of rapport may also be coloured by institutional histories that provide particular narratives of the value of developing one's teaching within the college or university, and that guide the traditional ways that one pursues help with one's teaching practice, whether through self-study, collegial networks, or professional advice and development opportunities offered through the teaching centre. The nature of the space in which it occurs, whether public, semi-private or private, one party's office or another, on campus or off, may affect the quality of consultation. In addition, time is a resource that is difficult to secure, which affects the frequency and length of the consultation. Factors such as institutional histories, cultures, narratives, symbols, rituals, organizational structures, and spaces can influence the nature of rapport and the practice of consultation. EDs who actively analyze and endeavour to predict the possible limitations and opportunities presented by the nuanced differences in culture and context will be better equipped to adjust common practices, which will lead to better, more effective interactions with instructors.

This chapter is intended to provide a theoretically-informed, but practical, methodological, and ultimately individualized, approach to considering the ways in which our institutional cultures and contexts might influence work in rapport building. To help you cultivate your own situated practice for assessing the factors influencing rapport building in your own institutional context and culture, a series of guiding questions are proposed. I invite you to use the questions offered, and add your own as appropriate, to consider how context and culture might influence rapport and the ways you might wish to shape your practice to enrich your engagements with instructors.

Culture and Context

Roles and Relationships

Reflecting upon one's own location—both literally and symbolically—within the institution and that of the individuals with whom we consult as EDs can help to direct approaches to building rapport and establish more meaningful interactions. For example, as Cook and Kaplan (2011) observe, EDs are sometimes seen as neutral or safe resources: "when potentially marginalized faculty come to see us about teaching and learning, we are a confidential resource outside the departmental hierarchy" (p. 141). This perception may empower instructors to speak with us more candidly and to ask more fundamental or probing questions, than they would with others. Understanding the perceived power relations, taboos, and tensions at play within their college or university can help EDs to know how general and guarded or forthright and specific to be in making recommendations, as well as to know, as Thompson (2016) suggests, "when to ask, when to suggest and when to tell, making connections between strategy, policy and practice" (p. 70). The following questions are intended to help you to situate yourself and others within the organizational and power structures of your college or university:

- What specifically can we say and do to create trust and promote an honest conversation about teaching?
- How do rapport-building activities evolve when we are supporting individuals, teams, or entire faculties?
- How does the nature of the roles influence rapport building? What might shift in encounters between junior vs. more senior or contract vs. permanent EDs and part-time, contractually-limited term-appointed, tenure-track or tenured faculty?

Consider Case #2. How might the dynamics between Paulo and Cecilia have been influenced by roles, power relations and individual personalities?

- How do the individual personalities of the consultant and the consultee gel? What motivations, expectations and hopes exist for each? What are their academic backgrounds?

Academic Change Processes

Understanding the formal and informal processes through which courses and programs change within your college of university is critical to advising instructors well and to building the trust that comes from advising instructors wisely and carefully. Navigating academic governance processes can be convoluted and fraught with politics, but EDs can support instructors in thinking through how to build support to implement their desired improvements.

- What are the institution's academic governance structures and how engaged are the EDs and instructors in those structures? How knowledgeable or oblivious are they each to broader conversations in the institution?
- How might reporting relationships factor into the nature of rapport building and consultations? What topics are sensitive and where might the disclosure of information be difficult for one side or the other to manage? What are the considerations for confidentiality and reporting of issues?
- Knowing the steps in governance of change processes can help the ED determine how best to support the instructors in strategizing change implementation from what is completely within their scope of control and what will require consensus building and approvals. How does teaching and curriculum change really happen in the institution? Where do matters of scope and purview lie for the individual instructor?

The Identity of the Teaching Centre

The dominant perceptions of the teaching centre may shape the quality of the rapport built between an ED and an instructor. As one interviewee observed, rapport is "a bigger thing than just one-on-one. At least at our centre it is, it's about how does the institution perceive the centre, how does it perceive us as a group. And so the rapport is built, that trust relationship is built on a lot of different levels" (Interview 7). Acquiring an objective sense of the teaching centre's reputation within and across the institution can be a challenge for EDs, but attempting to gauge this can also help in building rapport.

- What are the teaching centre's priorities and what is its real and perceived role within the institution?
- Is the teaching centre thought of as a vibrant resource and community for scholars of teaching and learning, as a fix-it shop or as something else? How might these perceptions affect the instructors accessing the centre?
- How might the centre's values—and its related vision, mission and mandate—influence the time, attention, resources, and priority given to building rapport? For example, is there such a significant focus on cost control and impact measures that there is little opportunity for individual consultation in the service-delivery models?

Labour Models and Mix

Although many of our campus environments are caring, supportive, and open to innovation, some restrictions can be placed upon instructors depending on their circumstances. For example, a sessional instructor teaching in a multi-section course led by a course co-ordinator will likely be more limited in the changes they can make to their section: team-taught courses can present complexities in implementing changes in instructional strategies, learning activities, assessments, and course resources. It can prove helpful—in both building trust and setting the instructor up for success—for an ED to become familiar with the rules and conventions in practice that influence both their own work and faculty work on course design and delivery so that the recommendations made to faculty members through consultative practices are well-conceived and can be implemented.

- What is the nature of the course or courses under consideration for revision? Is it a stand-alone, elective course taught in one section, a team-taught course or one section of a much larger course? Does the course have pre- or post-requisites?
- What must faculty and EDs understand about the details of collective and local agreements that govern their work? How does this change for faculty members depending upon their status as tenure or non-tenure-track, and short- or long-term appointments?
- How might the labour relations environment influence trust and rapport building? What are the traps and vulnerabilities for both the EDs and the faculty? How can these be navigated respectfully and successfully?
- What is the range of distribution of effort models and how might that framework influence the recommendations that the ED makes and their understanding of the kinds of recommendations the faculty member might be able to act upon reasonably?
- Would the changes envisioned have implications for other instructors, divisions, or departments that support the academic mission of the college or university, such as IT Services, the Library, or Facilities? How will others be consulted appropriately?

Roles and Relationships

Academic Change Process

Identify of the Teaching Centre

Labour Models and Mix

Formal and informal Networks

Institutional History, Type, Vision, Mission, and Values

Program Mix

Influences of Professions and Disciplines

Spaces

Data and Resources Available

Formal and Informal Networks

Aiding instructors in building internal networks and catalyzing knowledge sharing and mobilization (Thompson, 2016) can help to sustain their efforts to improve their courses, give them a conduit of information that can expand their perspectives, and potentially provide them with some sage advice regarding how best to implement improvements. Connecting instructors to internal networks—which EDs can play a role in founding and sustaining—can help creating healthy, self-sustaining communities of practice. Such informal networks are also useful in encouraging engagement in the Scholarship of Teaching and Learning (Williams et al., 2013) and may contribute to the development and linking of “small, significant” networks that can foster important conversations about teaching and contribute to cultural change (Verwoord & Poole, 2016).

In his work on academic tribes and territories, Paul Trowler (2001) established methods for studying the sociology of teaching, learning and enhancement. His more recent work is helpful in guiding our consideration of the ways that micro-cultures within our colleges and universities can affect initiatives (2014).

- How might you examine discourses and practices, as well as symbolic and material interactions, to consider how power relations and values may influence rapport building and influence change efforts?
- What micro-cultures are in evidence within your institution and how might they support or limit rapport building?
- What are the productive networks that the ED might turn to for support and guidance? Where are those networks for the instructor beyond the ED and the teaching centre?
- Who else can, or in some cases should, the faculty member consult with to gain perspective and expertise, and what can the ED do to foster such outreach and connections?
- Why might an instructor's referral to such informal networks be the work of the ED? What is the potential value for the instructor?

Institutional History, Type, Vision, Mission, and Values

The cultures of our institutions can vary across programs and divisions, but are often influenced significantly by the history of the college or university, its geographic placement, its physical and virtual infrastructure, its ties to other institutions, its type, its identity as an upholder of traditions or an iconoclast, and its relative emphasis on service, research, and teaching. (Consider also the lasting implications of signature pedagogies, such as co-operative education at the University of Waterloo, learning enterprises at Niagara College, or problem-based learning in McMaster University's School of Medicine). EDs may benefit from considering the ways that different institutional histories can uniquely shape rapport building.

> The work of academic development is often, by its very nature, concerned with bringing about cultural change. Academic developers need to work as effective agents for change within the organizational culture.
>
> (Thompson, 2016, p. 70-71)

- How receptive to change is the institution? Is your college or university hidebound, conservative, and focused on maintaining traditions, is it aggressively innovative and iconoclastic, or does it endeavour to find its moorings in a sea of change?
- How large and diverse or small and intimate is your institution? Is it locally, regionally, or globally focused? What is its type according to our classification system or the Carnegie Classification system (http://carnegieclassifications.iu.edu/)?
- What unique contribution does your institution make to the post-secondary education sector? How does it define its mission and mandate?
- What educational ideals does the institution hold in highest regard and how are these values ensconced in the everyday lived experiences of those who work within the institution?
- Are the values equally espoused and widely held?
- What perceptions of educational development and participation in educational development circulate in the community? Is it obligatory or optional? Self-directed or group-oriented? Celebrated or suspect?
- How do the values of your college or university influence what changes can be made, or what innovations can be introduced in teaching and learning? How do these values permeate conversations including those undertaken during consultative practice? How might institutional values shape the development of rapport?
- What is the desired future state of the institution that is being pursued within strategic planning documents?

- Is there significant consensus or dissent around the articulated vision? Are people generally engaged or disconnected to the leadership's vision?
- How might an awareness of the vision and its significance within the institution shape the nature of rapport-building activities—the nature of probing questions, the gentle steering and avoidance, and the subtle warnings or encouragements that might arise?

Program Mix

EDs' knowledge of the entirety of program offerings at their college or university and of any dynamics that may be at play between program areas regarding matters such as reputation, resources, collaboration, and competition can inform the work of building rapport with instructors, as it can help to develop awareness of potential sensitivities and opportunities.

- How many and what types of programs are offered at the institution?
- What is the perceived pecking order of the programs and how might knowledge of that order influence rapport-building activities?
- What considerations about attitudes toward conservatism and staidness versus risk and innovation, about program growth or decline, or related trends in the institution's program mix weigh into advising and rapport building?

Influences of Professions and Disciplines

> It is critical that education development specialists appreciate the diverse approaches to knowledge organization, problem-solving, values and communication that characterize various disciplines. This knowledge has real impact on our capacity to assist colleagues in making these aspects of expert knowledge explicit in their teaching and to understand how we can best foster reciprocal integration of theoretical and practice-based knowledge about teaching and learning in the disciplines.
>
> (Taylor 2010, p. 61)

The disciplines, professions, and trades do share perspectives on curriculum and approaches to teaching, learning, and assessment, but the unique nature of distinct fields has also imbued many with particular approaches to instruction that form dominant pedagogies. Think, for example, of the centrality of studio education and critique practice to disciplines such as art, design, and architecture, or the importance of practicum placements in human service and health programs.

Lynn Taylor (2010) suggested that "to optimize the impact of their work with colleagues in the disciplines, educational developers need to craft a synergy between generic approaches to planning learning experiences and the disciplinary processes of inquiry that shape how they assess the work students produce through these processes" (p. 62). Similarly, Weston and McAlpine (1999) recommended the consideration of discipline-specific consultations and Palmer (2010) advocated for the value of "knowing in community" (p. 90).

Given the potential influence of disciplinary traditions on rapport building, EDs should endeavour to understand the instructor's sense of identity and belonging, and to follow the example of one ED who makes a deliberate effort to understand and respect the disciplinary focus of the instructor: they suggest to read "books that talk about disciplinary differences…things that get people into discipline, norms of discipline, and disciplinary thinking. A bit of history of higher ed. So that people understand the differences between institution types." Then with this background understanding, "think about a faculty member entering into his or her discipline in that historical, cultural, political context" (Interview 5). Building empathy and trust can benefit from learning about the different disciplines' cultures, traditions, discourses, and practices.

- What are the predominant traditions of teaching and assessment methods within the discipline of the instructor? Are there customs of curriculum design and delivery that feature prominently wherever their program is taught?
- What research exists to validate the effectiveness of dominant approaches to curriculum, teaching and learning?
- In the interest of building good rapport, what do you imagine that you need to understand about the dominant and secondary models of curriculum delivery in the programs?
- What is the mix of lecture, seminar, lab, WIL, and advising for instructors in the program?
- What might you learn about the courses the instructor teaches and the nature of the student body?
- Is there an appropriate opportunity for you to observe teaching and learning in the program?
- Where does the fealty of the instructor seem to lie? To students, to immediate colleagues, to their department, to their college, to their university, to their discipline, or to their professional bodies?
- How might knowledge of their sense of allegiance influence rapport-building approaches?

Spaces

As Nancy Van Note Chism (2006) noted, “space can have a powerful impact on learning; we cannot overlook space in our attempts to accomplish our goals” (p. 2). Those of us who work in education are likely familiar with how classroom design elements, such as the arrangement and type of seating, the nature of writing surfaces, and the projection surfaces, lighting, technology, equipment, and sound control elements, can limit or enable teaching and learning activities in the space.

The same considerations apply to the nature of the spaces in which EDs seek to build rapport with instructors. Your choice of location for a consultation can convey highly influential nonverbal cues to participants that shape the tenor of interactions in the space. Specifically, think about the ways that space suggests power dynamics and trust. Some spaces are designed to separate experts and novices and to direct attention toward an instructor conveying information to a largely passive recipient. Other spaces are designed to encourage interaction and not overtly reinforce any particular hierarchical relationships. Similarly, overt and subtle aspects within spaces can either encourage or discourage the sharing of potentially sensitive or confidential information. Spaces can promote or discourage intimacy, trust, interaction, engagement, and ideation. EDs should consider both the spaces available for consulting and rapport building, and the spaces in which instructors teach so that recommendations and advice are grounded in an awareness of how space may limit or enable behaviours and approaches.

- Where do consultations happen between EDs and instructors? How does the nature of the consultation spaces affect the dynamics of rapport building? What becomes easy, possible, challenging, and impossible in these spaces?

> Consider Case #1; what are the ways that Sharmi’s office space might shape the consultation?

- Where does instruction happen for the instructor and across the curriculum for the program? Do the spaces lend themselves better to particular approaches to teaching and learning than others? If you can, you may wish to visit the physical and virtual instructional spaces to you gain a deeper understanding of the constraints and possibilities for teaching and learning.

Data and Resources Available

Cook and Kaplan (2011) advised that “a research-based approach can be critical for convincing faculty to participate in and administrators to support the consultation process” (p. 77). Kezar and Eckel (2002) also noted that “context-based data helps the change agent to understand why and under what circumstances strategies work at a particular institution at a particular time” (p. 2). So, EDs need to consider the availability and dissemination of reliable, valid data to inform considerations of the ways that instructors might proceed with making improvements to their courses. Gathering relevant literature and suggesting useful data sources can help bolster the legitimacy of the ED’s recommendations.

Along the same lines, EDs should know and share information about the resources that can realistically be used to support the instructor. Informing of the instructor of how much access they have to expertise, tools, and time can help them to determine how best to proceed in making desired improvements in the courses.

- What data and relevant existing scholarship can be gathered to inform discussions with the instructor?
- Is there internal data of relevance? Is there external data that would be applicable and valuable in this case?
- How much opportunity will the instructor have to avail themselves of the expertise and resources that are critical to their success?

> an instructional consultant plays a key role in assisting the faculty member to both interpret the available data and identify strategies for improving teaching. Drawing on their experience and professional judgement, instructional consultants had the ability to quickly direct faculty attention to specific teaching practices and avoid overwhelming the instructor with too much information.
>
> (Finelli et al., 2008, p. 405)

Summary

As EDs striving to build rapport with instructors to promote positive change and growth in their practice as instructors, as Trowler (2014) advocated, there is value in developing our skills in the praxeology (p. 1) of consultation—in the critical study of our everyday engagement in the social practices situated in our particular contexts that shape our interactions. We benefit from reflecting on the social and physical contexts in which we are building rapport. As Trowler (2014) argued, “the background knowledge and motivating characteristics of each person in the social field are significant in determining specific outcomes and levels of success of an innovation” (p. 5). We must understand our own practices as situated ways of knowing and being, and try to understand those of the instructors we consult. As EDs build rapport with instructors, understanding of the ways that influences such as roles, culture, history, and spaces may shape the instructors’ selection, provision, reception, and application of recommendations can help ensure that we are serving them well. For instructors, learning about teaching is more effective if it is contextualized and their teaching will benefit from situated practice, study, experimentation, feedback, and reflection. Consultation with EDs aids in this cycle; rapport building is an important component of effective consultation.

Reflection Point

- How can a critical, objective awareness of institutional culture and context help EDs conduct effective consultations?
- What critical questions and practical steps can an ED take to build internal networks and create healthy communities of educators that will be self-supporting and self-sustaining?

Recommended Resources

Boud, D., & Hager, P. (2012). Re-thinking continuing professional development through changing metaphors and location in professional practices. *Studies in Continuing Education, 34*(1), 17-30.

Keesing-Styles, L., Nash, S., & Ayres, R. (2014). Managing curriculum change and ‘ontological uncertainty’ in tertiary education. *Higher Education Research & Development, 33*(3), 496-509.

Lewis, K. G., & Povlacs, J. T. (2001). *Face to face—A sourcebook of instructional consultation techniques for faculty/instructional developers.* New Forums Press.

Norfolk, T., Birdi, K., & Walsh, D. (2007). The role of empathy in establishing rapport in the consultation: a new model. *Medical education, 41*(7), 690-697.

Trowler, P. (2005). A Sociology of Teaching, Learning and Enhancement: improving practices in higher education. *Papers: revista de sociologia, 76*, 13-32.

Trowler, P., Saunders, M., & Bamber, V. (Eds.). (2012). *Tribes and territories in the 21st century: Rethinking the significance of disciplines in higher education.* London: Routledge.

Chapter 4

The 5 Moments of Building Rapport During the Individual Consultation Process

Jean-Pascal Beaudoin

"I'm there to encourage them, to sort of be on the journey with them… to sort of guide."

(Interview 18)

But how?

Previous chapters have reviewed what building rapport is and why it should be valued. This chapter presents you with answers to the questions:

- How do you go about creating one-on-one rapport with instructors?
- What do you say and do?
- What are some of the necessary interpersonal skills, behaviours, strategies, and tools for successfully fostering supportive interactions with instructors?[1]

As you will read in the next few pages, EDs build rapport during individual consultations through a relational process, specifically by using efficient rapport tools, understanding the instructor's context and needs, and developing a keen awareness of self to become more competent rapport facilitators.[2] As such, EDs have a responsibility to guide and set the tone for the professional relationships with instructors to lead to successful outcomes, even when the interaction is co-created between EDs and instructors.

While EDs are expected to know about teaching and learning to provide appropriate and credible advice and guidance,[3] this chapter's focus is on EDs' knowledge of and ability with the process of rapport building.

Chapter Learning Outcomes

By the end of this chapter, readers should be able to:

- Describe the outlined process and tools for creating optimal rapport at each moment of a consultation session;
- Describe how understanding others and being aware of one's patterns and skills impact rapport building; and
- Reflect on your current approach to building rapport and set goals to expand competency.

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1 Adapted from interview questions by West & Hoessler, 2017.
2 Beebe et al., 2015; Davis, 2014; Hétu, 2014; Purtilo, Haddad, & Doherty, 2012; Taylor, 2008.
3 Dawson Britnell, Hitchcock, 2010; McDonald et al, 2016, Timmermans, 2014; Boye & Trapp, 2012; Taylor & Rege Colet, 2010.

Why this focus? As one interviewee noted,

> We'd like to think it's all about theory and evidence-based practice, and all of those things are important, but mostly it's about emotion. That's what you have to address if you're going to be successful and effective, and that's where the relationship thing is about. It's a heart thing, not a head thing (Interview 19).[4]

And that *heart thing* can be challenging for EDs. Thus, clear strategies and reflective questions are provided throughout the chapter for experienced EDs contemplating their current approach, and newer EDs seeking to learn how.

Key Knowledge to Successfully Build Rapport

When consulting pertinent literature in the fields of educational development, education, and personal, professional, and therapeutic relationships, it becomes clear that the ED, as a rapport facilitator, has to become familiar with a variety of concepts to professionally and competently guide instructors in their quest for change. From these readings[5] and from experience,[6] a framework emerged, resulting in grouping information into four categories with key aspects highlighted in each category, as outlined in Figure 4.1.

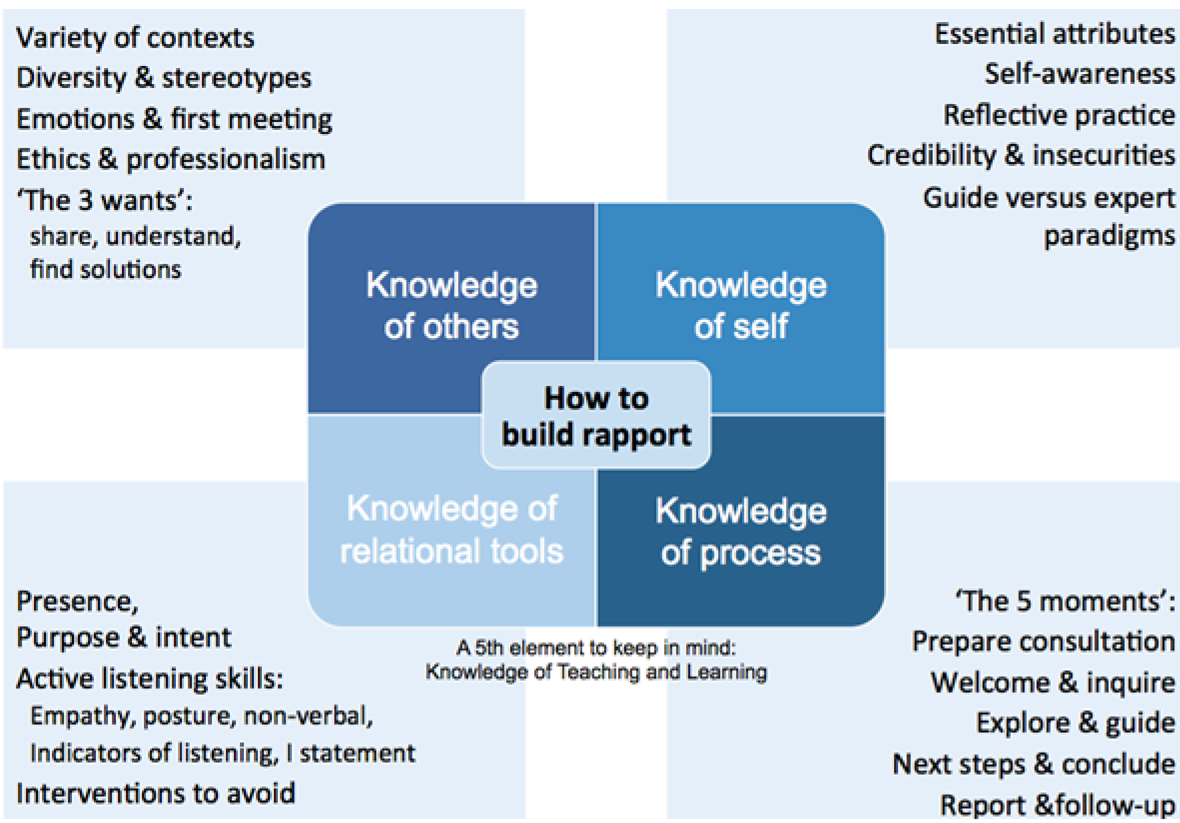

Figure 4.1: The Four Knowledges[7] for successful rapport building

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4 Gibbs (2013) also supports this view.

5 Beebe et al., 2015; Davis, 2014; Hétu, 2014; Timmermans, 2014; Boye & Tapp, 2012; Purtilo et al, 2012; Little & Palmer, 2011; Taylor & Colet, 2010; Dawson et al, 2010; Larson, 2009; Taylor, 2008; POD, 2002.

6 Interviews by West & Hoessler, 2017; and course material from Beaudoin, 2012.

7 The term *knowledge* is inclusive of aspects such as values, conceptions, attitudes, skills, abilities and understanding of key concepts

To successfully build rapport, it is important to know about: a) your own relational patterns, because this leads to a better use of self as a relational tool (*knowledge of self*); b) the instructors to adapt the change process to their context and wants (*knowledge of others*); c) the skills, behaviours, attitudes, and tips to foster optimal rapport (*knowledge of relational tools*); and d) the five moments with sequential steps that lead to an effective individual consultation process (*knowledge of process*). This last category, *knowledge of process*, is the primary focus of this chapter, with aspects from the other three knowledges appearing throughout to offer additional guidance.[8]

Knowledge of Process for Building Rapport

An individual consultation process can be delineated by five overarching moments occurring over one or many meetings, depending on the nature and scale of the request:

1) preparing for the meeting;

2) welcoming the instructor;

3) exploring goals, challenges, and solutions (of which innovations and steps for change are a part);

4) concluding the session; and

5) wrapping-up after the meeting.

Each moment has activities attached to it, and they are uncovered sequentially as the framework[9] in Figure 4.2 is described throughout this chapter.

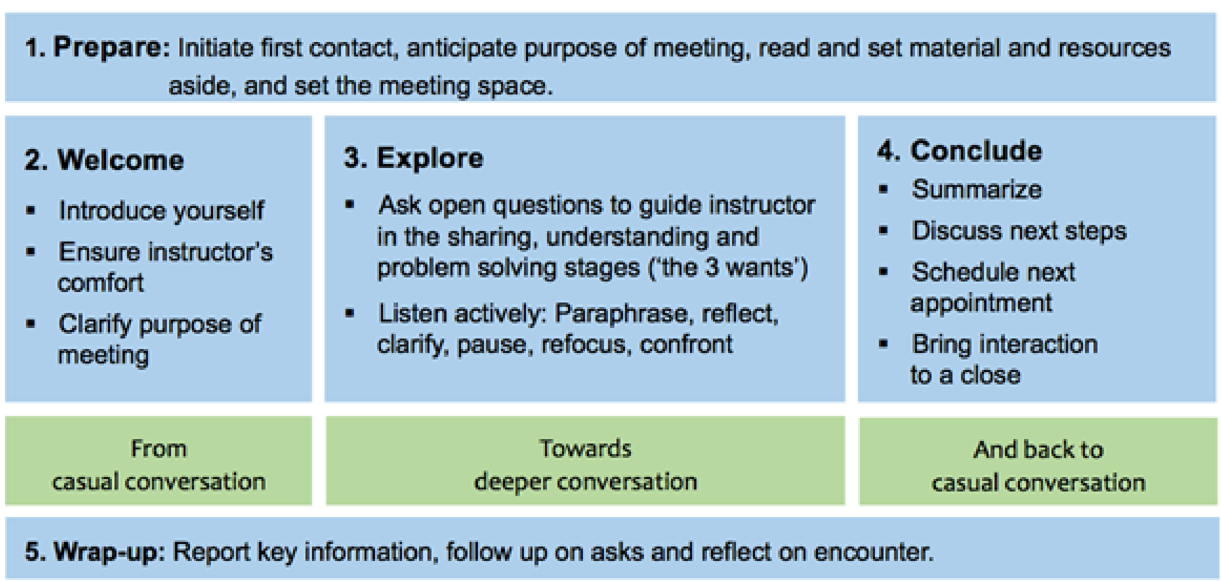

Figure 4.2: The five moments of an individual consultation process

8 A full description of the other three categories is forthcoming: Beaudoin & Hoessler (in progress). *The 4 Knowledge Framework for Successful Rapport Building in Educational Development.*

9 This framework is inspired by Davis's (2014) work. It also draws from, and is deemed representative of, key concepts discussed by many other authors. For example: West & Hoessler, 2017; Kozanitis, Demougeot-Lebel, & Daele, 2016; Beebe et al., 2015; Purtilo et al, 2014; Hétu, 2014; Boye & Trapp, 2012; Little & Palmer, 2011; Larson, 2009; Taylor, 2008

Over many meetings, these moments and activities will be repeated, and there will be some back and forth between them, as it is not a linear process. For example, welcoming an instructor the first time will take more time and will probably be more of the focus of the meeting, compared to after a few meetings when we know one another better and trust is established. Similarly, preparation time will vary from one meeting to another depending on the instructor's goals and expectations. Exploring could take more than one meeting. And, the time allotted for concluding and wrapping-up will vary depending on where you are in the consultation process: concluding one meeting or wrapping-up the whole consultation process prior to closing the instructor's file? To learn more about this, you may wish to consult Chapter 5, *Figure 5.1—The importance of facets of rapport over time*.

By navigating through this process, you will become more efficient at facilitating and building rapport, at going back and forth between the moments, at maintaining the quality of interactions, and at reaching the expected outcomes. Using these five moments in your practice will eventually become second nature, like riding a bicycle or driving a car.

An important distinction is to be made before describing the five moments in detail, one-on-one consultations are not therapy sessions but a process to increase understanding, provide clarity, and support individual development within a learning conversation (Eascott, 2016).

Reflection Point

- How would you describe your current approach to rapport building in one-on-one consultations with instructors? For example:
  - What expectations do you have or what assumptions do you make about rapport building based upon your experiences?
  - Which relational process (steps) do you use in your consulting with instructors?
  - In which way is it similar or different to the process introduced in this chapter?

Moment 1: Preparing for the meeting[10]

When receiving a referral, it is recommended to promptly schedule an appointment as per customer service's best practices. In that communication, you may want to inquire about the instructor's reasons for consulting and about their expectations. This information should allow you to reflect on how you plan to approach the instructor and their challenges or need for innovation / change. For example, reading and setting material and resources aside, thinking about some of the questions to ask the instructor to explore their context, and preparing for additional options because how you see the purpose of the consultation may transform over time and across individuals' evolving needs or requests (see Chapter 6 for more details on your journey as an ED).

Reflection Point

- How do you usually prepare for a consultation?
  - For example: How do you inquire about the purpose of a consultation? What material do you review?
- How do you integrate professionalism, confidentiality, and other ethical principles to how you build rapport?

10 Hétu, 2014; Davis, 2014; West & Hoessler, 2017

Moment 2: Welcoming the instructor [11]

When meeting the instructor for the first time, your verbal and nonverbal messages should be welcoming to set the tone and start building rapport right away. Instructors may be nervous and need reassurance that they made the right decision to meet with you and that they will be supported in setting and reaching their goals. Greeting and seeing to their comfort can go a long way in making them feel welcomed and more relaxed: "faculty development can be seen as an act of hospitality … in which our colleagues feel welcomed" (Larson, 2009, p. 48-49). It is an important first step in building trust and rapport.

To view an example of what moment 2 can look like, refer to the first few lines of Case #1 located earlier in this guide.

> I'll say come sit down, big smile on my face, and it's sincere, and I say how can I help you? And that's my way of saying I'm here to serve you, you know, and I'm totally open about it, my body language is open, and so that sets a good tone right there whether there's small talk before or not.
>
> (Interview 16)

If you are meeting the instructor in your office, set the meeting space in a way that will be welcoming and conducive to building trust and openness to sharing in confidentiality.[12] To know more about the impact of physical environments on building rapport, growing, and change, please refer to the section on Spaces in Chapter 3. If you are meeting the instructor in their office or in another location, be mindful of who can hear your conversation. Ask if the instructor is comfortable with colleagues or other people being aware of their context, should the door stay open or should you meet in an open space.

Once the greetings are completed, the next step would be to begin with casual conversation to ease the instructor into the consultation process.[13] It is up to you to adjust your style and level of questioning to the instructor's personality and preferences (for example, small talk versus right to the point).

Then, you can move along, deepening the conversation. The types of questions you may want to consider are often related to asking about the reasons for their visit, their initial perspective on the challenge or innovation they are consulting about, and their needs and expectations (see sample questions in blue box titled *Clarifying the purpose of meeting*).

Sample questions – Clarifying the purpose of the meeting:

- What brings you here today?
- What should I know about your context?
- Tell me about what is challenging you.
- Tell me about this idea you have.

You may also consider explaining your role in the consultation process, and your approach, when necessary, to put the instructor's mind at ease and build trust, if they are facing a challenge; or, to share their excitement of an innovative idea and clarify how you and they see your contribution to what they have in mind.

Reflection Point

- How do you usually welcome instructors and start conversations?
- What is your natural style when first establishing rapport? What should you be looking for when interacting with the instructor to adapt your style to theirs?
  - For example: Do you usually start with small talk or do you ask the equivalent of "what can I do for you today"? How does that impact building rapport and the consultation process? How do you know when it is best to start with one or the other?

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11 Kozanitis, 2016; Hétu, 2014; Davis, 2014; West & Hoessler, 2017; Boye & Trapp, 2012; Little & Palmer, 2011; Larson, 2009

12 You may consult POD's Ethical Guidelines (2002) to learn more about conducting oneself ethically and professionally in the individual consultation process.

13 To convey interest to the instructor, try to face the instructor at a slight angle, with an open posture - arms uncrossed, leaning toward them, maintaining eye content, with a relaxed body language.

Moment 3: Exploring challenges, needs for change, and solutions[14]

Exploring, which may take more than one meeting, starts by focusing the conversation on gaining a better understanding of the challenge at hand. For example, it could be done by exploring and clarifying the context, the origin, and the perceived impact of the concern or need for change (the "who, what, when, where, and how"; see sample questions in blue box titled *Understanding*). Once completed, you could then move toward exploring solutions with the instructor.

Sample questions - Understanding

- "What is working well? What is not?" (Little & Palmer, 2011, p. 109)
- "What is really important to you about this?" (Little & Palmer, 2011, p. 109)

In the exploring phase, the first step would be to discover the instructor's context. It is of the upmost importance. As Timmermans (2014) stated, "Any attempt to facilitate change requires a willingness to uncover and understand the multiple contexts in which concerns and issues are situated" (p. 311). There are, according to Larson (2009), disciplinary, pedagogical, corporate, personal, and interpersonal truths to take into account and to be open to.

The second step would be to examine the challenges or desire for change raised while keeping in mind the three wants.[15] In North American culture, people seeking a consultation usually expect that they will 1) share their experiences, reactions, or thoughts, while being listened to; 2) understand what is happening to them and what outcomes they expect from the consultation process; and 3) be supported in finding solutions. These three expectations should be addressed sequentially, even if briefly so, depending on where the instructor is at.

The ED must first make room for the instructor to share their concerns, thoughts, or ideas, whether they are positive or negative, in order to recognize and respond to their unique reality. This connecting step then leaves cognitive room for the instructor to raise their awareness of their context and needs. This step also builds trust and enables rapport. Finally, with a fresh outlook on their situation, they are more receptive to be guided through finding the solutions or innovative practices that best meet their context or needs.

In line with the three wants, ED should explore the challenges through an instructor-focused process of questioning and sharing:[16] intentions (values, assumptions) should be considered, reflected on, understood, and reconsidered, before thinking about problem solving or discussing strategies to improve, for example, a teaching and learning challenge.[17] Otherwise, solutions or strategies don't translate as well into practice, and in many cases, aren't transferred at all (Trigwell & Prosser, 1996).

The third step would be to revisit goals and link them to what emerged since the beginning of the consultation process (*Moments 1 to 3*), as goal setting encourages action (Little & Palmer, 2011).

The fourth and final step would be to identify, analyze, and select solutions. Strategies include guiding the instructor through brainstorming possibilities, selecting the most appropriate option(s), determining next steps, and figuring out how to integrate the new behaviours, skills, strategies, or tools to their educational practice, where applicable.

Exploring solutions, even within the instructor-centered collaborative approach,[18] will also require that you give advice, provide recommendations, and act as a sounding board. Finesse and balance are required in

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14 Kozanitis, 2016; Hétu, 2014; Davis, 2014; West & Hoessler, 2017; Boye & Trapp, 2012; Little & Palmer, 2011; Larson, 2009; Prosser & Trigwell, 1996.

15 Mainly Hétu, 2014, with insight from Kozanitis, 2016; Davis, 2014; Boye & Tapp, 2012; Little & Palmer, 2011, Larson, 2009; Taylor, 2008; Trigwell &,Prosser,1996.

16 Also referred to as coaching by Boye and Tapp (2012) and Little and Palmer (2011). The facilitator's role was reinforced by Timmermans (2014) and Taylor and Rege Colet (2010).

17 This plea is made by Trigwell and Prosser (1996), but is similarly supported in "The 3 wants" stages by Hétu (2014); Boye and Tapp (2012); Little and Palmer (2011); and Kozanitis (2016).

18 For more information, refer to Timmermans (2014), Boye and Trapp (2012), and Little and Palmer (2011).

the way you share knowledge, tips, and suggestions to avoid slipping into “expert” mode, which leads to less optimal results because fewer transformations occur this way.[19] Usually, asking well-designed context-specific open-ended questions[20] will help support instructors reflect on their practice and be ready to incorporate new strategies into their teaching (see sample questions in blue box titled *Finding solutions*).

Sample questions – finding solutions:

- “How do you think it would be best to approach this problem?” (Boye & Trapp, 2012, p. 124)
- “What would be your ideal scenario?” (Little & Palmer, 2011, p. 110)
- “What is another perspective you could have about this?” (Boye & Trapp, 2012: p. 123)

Exploring through active listening

Guiding and exploring through the steps described above requires using active listening skills and tools effectively.[21] This can make or break building rapport and achieving outcomes. Active listening is how you capture and process messages to reach the instructor and validate, clarify, and explore what they are saying. As Boyd and Trapp (2012) noted, “Remaining sensitive to the instructor’s needs and staying in tune with his or her individual personality can be especially powerful” (p. 123).

> So really listening and being tuned into what’s actually happening in a room is really important so you know what to say next, so you don’t make a misstep and just being aware of these non-verbal cues and clues.
>
> (Interview 13)

As such, it is recommended to be aware of what is happening in the verbal and nonverbal conversations.[22] Read between the lines and monitor changes in moods, facial expressions, and tone of voice. Then, adjust the questions asked, the type of information provided, and the flow of the conversation to what is being said and not said. The goal is to intentionally guide the instructor where they need or want to go as efficiently as possible.

To convey to the instructor that you are listening to and focusing on them, try to use a variety of indicators such as expressions like “mhmm” or “yes,” or head-nodding to acknowledge hearing what is being said. You may also consider using techniques like

> By occasionally summarizing and paraphrasing the instructor’s emotion and ideas, developers can check comprehension and reflect back the instructor’s feelings and values in their responses.
>
> (Little & Palmer, 2011, p. 106)

- Paraphrasing messages: e.g., “If I understand correctly, you are teaching to students who are from different fields and it makes it difficult to meet their different expectations and learning needs?” The instructor will feel listened to;
- Reflecting underlying reactions: e.g., “Am I correct in assuming that behind what you just said are frustration and a feeling of being at a loss?” This helps the instructor understand where they are at;
- Welcoming silence and pauses to allow the instructor time to reflect on, and to articulate, a meaningful response to the question you asked; and
- Refocusing divergent conversations: e.g., “This is an interesting idea. Maybe we could revisit this later for further exploration. Now, if we go back to…”. This helps the instructor stay on track.

19 Timmermans, 2014; Taylor and Rege Colet, 2010.

20 The other option is to use close-ended questions, which refer to questions that can be answered by yes or no. Those have a limited impact into expanding on a topic but can be useful when wanting to validate a fact with the instructor.

21 Many authors have written on this subject, including Beebe (2015); Hétu (2014); Davis (2014); Purtilo et al. (2012); Boye and Trapp (2012); Little and Palmer (2011); Dawson et al. (2010); Larson (2009); Taylor (2008); and Carré (2014). Interviews by West and Hoessler (2017) and course material from Beaudoin (2012) also explored this topic.

22 More than 90% of messages are conveyed by body and facial expressions, and by the tone and inflection of the voice, rather than by the meaning of words. Non-verbal communication is powerful, and therefore essential to cultivate (Carré, 2014).

In Case #1, earlier in this guide, which of the above techniques are being used by the ED?

Also, when providing feedback, expressing your perspective, or challenging the instructor, use "I" instead of "you" statements. The same applies with asking "what" or "how" rather than "why" questions. It will sound less accusatory. The instructor might be less defensive and more receptive to your feedback or challenging question if you say, "I think that…", "I have noticed that…", or "My perspective on this is…" rather than "You didn't consider…", "You could have…" or "Have you ever thought that saying this…"

Finally, as EDs, we are "influenced by the academic habit of criticism and finding fault [and] we may provide too many suggestions for improvement" (Larson, 2009, p. 51). As such, we must be careful to avoid making the instructor "feel ignorant and inadequate" (Larson, 2009, p. 51), which may otherwise negatively impact self-confidence, trust, and rapport. This relates back to active listening and being responsive to instructors' concerns.

Moment three is key to the consultation process, yet is complex, requiring several skills to explore the instructor's challenges, needs, goals, context, and solutions. In particular, EDs need to use active listening skills, such as open-ended questions, intentionality, and techniques such as paraphrasing, using "I" statements and "what" or "how" questions, and being aware of their own and the instructor's verbal and nonverbal communication.

Reflection Point

- Which exploration steps and tools do you currently use, and which ones would you like to integrate to your practice?
- When timely and appropriate, how can you embed information, tips, and recommendations in the conversation without falling into expert mode while guiding change within a collaborative approach?
  - What kind of well-crafted questions can you ask to help instructors reflect on their actions and come up with their own solutions? How will you convert "why" questions into "what" or "how" questions?

Moment 4: Concluding the session[23]

Once the brainstorming and reflecting pieces have been covered, the final steps of the meeting would be to

- summarize the highlights of the conversation to bring out clarity and progress;
- discuss next steps so the instructor leaves with at least a few strategies to try out, which sometimes means setting up an action plan when nearing the end of the consultation process (see sample questions in blue box titled *Discussing next steps*);
- schedule the next meeting when applicable; and
- bring the conversation back to a casual and lighter tone, before bringing it to a close to help with transitioning.

Sample questions – Discussing next steps:

- "What do you want to happen (next)?"
- "What specifically are you going to do (as the first steps)?"
- "What will be the hardest part for you in taking this action?"
- "What support do you need?"

(Little & Palmer, 2011, p. 110)

Lastly, be alert as to when the time has come to let the instructor go. With the appropriate tools and thought process, they should get to a point where they can solve their next challenge or face future changes on their own, depending on their context and request(s).

23 Hétu, 2014; Davis, 2014; West & Hoessler, 2017; Timmermans, 2014; Boye & Trapp, 2012; Little & Palmer, 2011; Larson, 2009; POD, 2002

Reflection Point

- How do you generally bring a meeting to a close?
- How much time do you spend on summarizing, discussing next steps, and bringing the conversation to a close? What could be the impact of skipping this part?

Moment 5: Wrapping-up the meeting[24]

Once the meeting is over, POD (2002) recommends in its *Ethical Guidelines* to confidentially write key information about the progress of the consultation. This allows you to remember key points or would allow a colleague to efficiently take over the sessions should you be away.

Then, follow up with the instructor with resources or information that you discussed at the end of the meeting. Resources may include providing references for an article or book; connecting the instructor to relevant individuals for networking or mentoring purposes; inviting the instructor to an event; or contacting the instructor to inquire about progress or how they are doing.

Finally, you should take a few minutes after the consultation session to reflect on what went well, what could have been done differently, and how you will adjust in the future when a similar situation occurs.

When an encounter was not as successful as it could have been, you could reflect on a few questions that could lead to trying a different strategy at your next meeting (adapted from Taylor, 2008):

- What happened and why? Is the instructor trying to influence you (e.g., to write a letter to their dean, or to do part of their work for them)? Is the instructor resisting your findings or recommendations? Is the instructor disengaging from the conversation? Is the instructor sad, anxious, or frustrated? Is the instructor putting into question your credibility?
- What should you do to acknowledge barriers to rapport? Should you speak to what you are sensing and ask the instructor what is happening and how best to move on? Authenticity is often the way to go.
- Which relational strategy will you use to get the rapport back on track? Should you listen to their concerns longer before moving to finding solutions? Should you give more control over the problem-solving process to the instructor? Should you be less confrontational or pushy? Should you be clearer in the way you share tips and advice?

You may refer to Case #2, located earlier in this guide, for an example of such an encounter and to practice the questions adapted from Taylor.

Engaging in self-reflection

One way to start understanding other people is to understand ourselves and where our attitudes, behaviors, and beliefs actually come from.

(Richmond, Wrench, & Gorham, 2009, p. 184)

It is also important to regularly reflect so you can be aware of your own communication style, strengths, insecurities, relational patterns, values, beliefs about people, professional conduct, and needs for improvement, because use of self as a relational facilitator is key in this role (Davis, 2014; Hétu, 2014; Taylor, 2008).[25] To be aware of, to reflect on, and to critique one's own attitudes, behaviours and skills with regards to interacting with people can go a long way in maintaining professionalism and effectiveness in guiding the individuals you are supporting (Hétu, 2014; Davis, 2014; Taylor, 2008; Purtilo et al, 2012).[26]

24 Kozanitis, 2016; West & Hoessler, 2017; Beaudoin, 2012; Dawson et al, 2010; Taylor, 2008; POD, 2002

25 Referring to *Knowledge of Self*, Dawson et al (2010) speak of *self-awareness*, Bédard Clement, and Taylor (2010) of *critical examination*, and POD (2002) of being *reflective* and *self-critical*.

26 To learn more about why and how to be self-reflective and self-critical, you may refer to Chapter 4 of Patricia Cranton's work (https://eric.ed.gov/?id=ED400406); to Moon, J. (1999). *Reflection in learning and professional development.*

This reflection could be part of your portfolio's educational development philosophy when summarizing the "values, beliefs, and assumptions … that you make about your practice and approaches … and why you hold these beliefs" (MacDonald et al., 2016, p. 35-36). To support this reflection, consider the reflective questions below.

Reflection Point

- In which way do you think your own values, behaviours, knowledge, and skills impact how instructors relate to you, seek your advice, and follow through? For example:
  - How do you usually interact with people? (e.g., formal vs casual; touch, eye contact; listening /talking ratio; tone and volume of voice; posture; etc.)
  - How do you react to ideas that are not yours? To instructors when they are defensive, frustrated, or withdrawing because they don't like what you recommend?
- What role do your beliefs and assumptions play in how you build rapport with instructors?
  - How are your views about teaching and learning, consultation styles, and educational development impact how you interact with and guide instructors? For example:
    - What do you think of instructors from specific faculties or departments? Do you think instructors are skilled or sufficiently prepared to play their part on the teaching team?
    - When looking back to past encounters, do you act the same way around instructors from different backgrounds? Do you spend more time with instructors who are likable or charismatic? Do you speed along the consultation process when interacting with instructors with a thick accent, or with different views on how to support students in their learning? How do you explain it?
  - How did these views affect past professional interactions? How would you proceed from now on?

MacDonald et al. (2010) suggest a few more questions that could guide your reflection. See page 37 of their guide – The Educational Developer's Portfolio (https://www.stlhe.ca/affiliated-groups/educational-developers-caucus/guides/)

Conclusion

Building rapport requires k*nowledge of self, others, process, and relational tools*, as per Figure 4.1. In this chapter, the five moments of a consultation process were covered to describe the steps, activities, and questions to ask (both to self and instructors) in order to build and maintain rapport to successfully guide change. As Timmermans (2014) noted, "Facilitating a change process cannot be successfully undertaken without first establishing relationships and building rapport with the people with whom we work" (p. 313). You may refer to Figure 4.2 to review the overarching concepts discussed in this chapter and to support your reflection on the questions posed throughout to further your professional development.

Abingdon, Oxon: Routledge-Falmer; and to Schön, D. A. (1983). *The reflective practitioner: How professionals think in action* (Vol. 5126). Basic books.

Chapter 5

Rapport in Groups

Donna E. Ellis and Veronica M. Brown

[When working with groups] you're trying to build rapport with a whole bunch of different people. We call it herding cats, right? But really you're trying to build rapport with somewhere between five and 50 people all at once. You know? That's a whole different level.

(Interview 5)

While EDs do a lot of one-on-one consulting (see Chapter 4), many of us also work in group settings (e.g., workshop facilitation, teaching retreats, communities of practice). Working with a group of individuals is complex—groups are not just a compilation of one-to-one relationships but rather an intricate web of interrelationships. We begin this chapter by defining groups, and then explore rapport in a group context. Finally, we apply these ideas to three scenarios relevant to your role as an ED.

Reflection Point

Before reading this chapter, consider a particularly successful group experience you have had. What contributed to its success? What helped build trust, empathy, and mutual respect among the group members? What was your role in developing those elements?

Chapter Learning Outcomes

By the end of this chapter, readers should be able to:

- Identify key elements of rapport in groups
- Plan for the complexity of building rapport with different types of groups
- Identify the effects of time and pre-existing relationships for rapport building in groups

Groups and Rapport

Defining Groups

Before exploring rapport in groups, we need to clarify what a group is. For this purpose, a *group* is a set of three or more individuals who undertake joint activities. The degree of interaction and the level of interdependence among group members varies, as does the group's size, composition, purpose, and norms (Forsyth, 2010; Heyer, Rao, Steward, & Thorp, 2002). The group might exist for a single activity, such as coming together for a workshop, or meet repeatedly (e.g., a multi-day workshop, ongoing committee meetings).

Various factors can influence the functioning of a group, such as organizational context (see Chapter 2), group structure, members' roles within and outside the group, and group decision-making processes. Consider, for example, a departmental curriculum committee that includes the Department Chair, faculty members, students, and staff. The latter three are representing other groups within the department while the Chair holds a position of power outside the curriculum committee. These existing relationships can impact how the group functions. While we do not examine these facets of group dynamics given our focus on rapport, we identify resources at the end of the chapter for those interested in further exploring group dynamics and facilitation.

Stages of Group Development

Groups are often conceived of as having a life-span. Tuckman's stages of group development (Tuckman, 1965; Tuckman & Jenson, 1977) provide insight into the interaction among group members over time by identifying five phases:

- *Forming* - members of the group begin to identify interpersonal boundaries and establish connections with the leader and the task;
- *Storming* - characterized by conflict when resistance to group influence and task requirements occurs;
- *Norming* - conflicts that arose during storming are resolved and greater group cohesiveness results;
- *Performing* - through flexible and functional roles, the group's energy is channeled into fulfilling the task; and
- *Adjourning* - the point at which the group concludes its task.

Not all stages may be seen in all groups, but all will typically emerge with groups that meet for longer periods of time. The forming stage is likely the most critical stage for EDs because that is the step that you will nearly always experience and it lays the groundwork for the other stages.

Facets of Rapport in Relation to Groups

In Chapter 1, rapport was defined as having three core facets: *trust*, *empathy*, and *mutual respect*. These facets also emerged from comments made by interviewees when they described rapport when working with groups.

Some talked about how to help create trust, even in groups, such as "reinforcing for people when something is confidential" (Interview 14). Another indicated that you may be able to leverage the trust you have built previously with a few group members to gain the trust of the others (Interview 7).

The interviewees also identified specific behaviours (group facilitation and interpersonal relational skills) that EDs could use to demonstrate empathy and mutual respect, similar to what they can use in individual consultations (see Chapter 4):

> the smiling, the nodding…[and] looking and sounding interested in what they have to say is important. Asking a lot of questions… [also] the use of humour. (Interview 14)

> listening closely is important when you're establishing rapport, because you really have to be able to hear what people are saying even if it's not what's coming out of their mouths. (Interview 13)

One interviewee, though, reminds us that the group setting adds additional challenges due to the presence of multiple people: "the whole listening piece can become hard when you get, you know, multiple people in the room…it can be challenging…when to kind of play traffic cop and make one person stop so someone else has a chance" (Interview 14).

A group situation adds new layers to the steps outlined in Chapter 4 and may make rapport building more challenging because of the numerous relationships that exist between everyone in the group. As an ED, you might also seek to help build rapport among group members regardless of whether you are the group facilitator or a participant because you understand the value of rapport in overall group functioning.

Tickle-Degnen and Rosenthal (1990) hypothesize a model for rapport that includes some similar elements to those identified in this guide, but also adds the concept of temporality. Their focus is on identifying measures for behaviours that are indicative of rapport. They purport that rapport has three essential components:

- *Mutual attentiveness* - interest in what others are saying or doing;
- *Positivity* - mutual friendliness and caring through polite, socially accepted comments and actions; and
- *Coordination* - a smooth exchange of ideas made possible by group-developed norms about communication (p. 286-8).

They also indicate that the importance for rapport in relation to these three elements can differ over time. In new relationships, mutual attentiveness and positivity are quite important and are demonstrated when people adopt polite behaviours that are "molded by norms of social propriety" (p. 286). Coordination is not as important early on and typically does not occur until later since the group members need time to learn how to interact with one another (e.g., conversational timing) and establish group communication norms. Later in a relationship, attentiveness is still important and coordination improves over time, but positivity becomes less important: "Over time, we would likely feel less constrained to present ourselves continuously in a favorable or pleasant light…We might feel at ease in expressing dissent one minute and assent the next" (p. 287).

Since it is common to interact with a group more than once, we have adapted Tickle-Degnen and Rosenthal's (1990) visual model to include all six components of rapport identified in this section as a means of beginning to capture the complexity of rapport over time (see Figure 5.1). We suggest that rapport in a single-activity group (e.g., one-off workshop) would fall on the early end of the Time of Interaction axis, while groups that meet repeatedly would fall more on the late end of this axis. The purpose of this diagram is to suggest that not all elements are critical for rapport at different times, a point which we will further illustrate when describing different group scenarios in the next section.

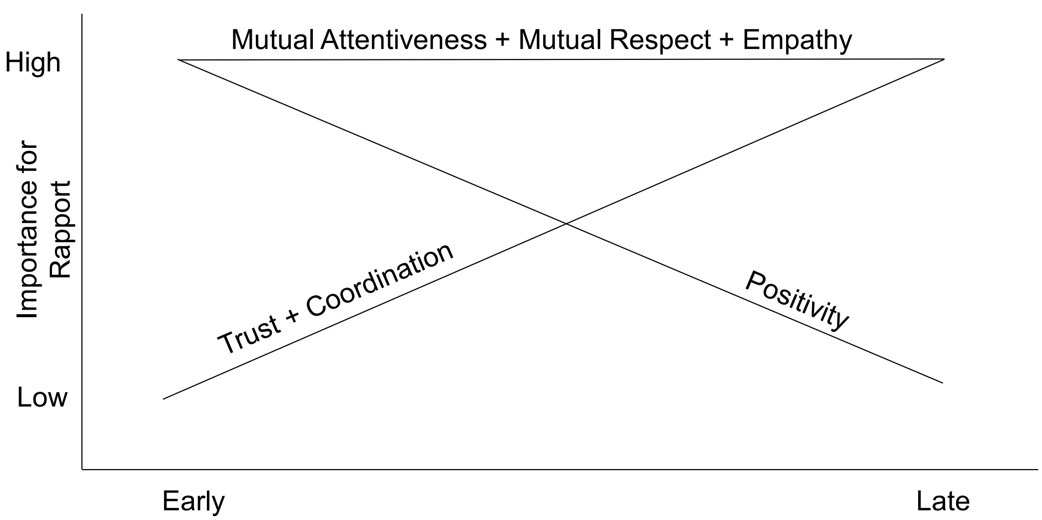


Figure 5.1: The Importance of Facets of Rapport Over Time

Reflection Point

Tickle-Degnen and Rosenthal (1990) suggest "balance, harmony, and 'in sync' come to mind when thinking of the experience of rapport… [conveying] a sense of equilibrium, of regularity and predictability, of coordination between the interactants" (p. 286). Considering the successful group experience you identified earlier, what behaviours did you observe that suggest the group was 'in sync'?

Rapport in Action

In this section, we describe our experiences with rapport in actual group settings. Our goal is to illustrate how the various facets of rapport from Figure 5.1 have more or less importance in different group contexts. Our examples focus on activities in which EDs often engage, so our experiences and resulting advice should be applicable—or at least adaptable—to your setting.

Rapport for Short-term Groups

An example of a short-term group is a one-off workshop. Many of us run single-event workshops as part of our programming that bring together participants who are (hopefully) interested in learning more about the topic. Let's look at a short example to provide some context for further exploration:

> You're facilitating a 90-minute workshop on motivating students for a group of 15 faculty members in engineering. You recognize only a few of the faces in the room, and you doubt they all know one another since they are from different departments. In the workshop, you'll be explaining a motivation theory, but you want to bring it to life with the group by having them identify ways that they enact this theory in their teaching. You need them to feel comfortable sharing their experiences; you need them to participate. You also anticipate that you'll be sharing some strategies that they do not currently use, which may uncover gaps in their practice. What's important for building rapport in this situation?

The defining feature of short-term groups is the limited time spent together as a group. In this setting, some level of rapport is necessary to create the right learning environment, yet a short-term group might not naturally establish the norms, trust, or cohesion developed by longer-term groups that move through the various stages of group development. Indeed, many of the participants might not see themselves as members of a group. But the characteristics of rapport that are important early in a group's interaction seem relevant in this scenario.

What's important at the early stage of a group? Mutual attentiveness and respect are cornerstones to a positive workshop experience. As the workshop facilitator, a large part of your role is to encourage a respectful exchange of ideas, particularly when the workshop relies on participants' contributions. In the scenario above, you want participants to share motivation strategies they have used, but they will likely only do so if they feel that others will listen and respect their contributions.

Many will also be looking for positivity via respectful (often positive) feedback on their ideas versus criticism. Using a brainstorming format, which avoids any judgment about ideas shared, can assist in keeping idea-sharing respectful because the response is accepting. Beyond brainstorming, facilitators should affirm contributions as often as possible to signal an open and accepting manner. By using phrases such as "great point" or "helpful example," you can demonstrate your respect for the participants' ideas and model this feedback approach for all participants. If a contribution seems off-target, facilitators can thank the respondent for their input and ask a follow-up question to probe the respondent's underlying thinking to clarify if there is an opposing view. Or facilitators can defer such responses by putting them in a "parking lot" (a list of unresolved ideas) for follow-up discussion with the respondent.

Empathy is also important for rapport at this early stage. If a workshop participant shares a sample strategy that did not work to build motivation or discloses a perceived lack of student motivation in their courses, one way to validate their experience and show your acceptance is to convey empathy for their situation. Phrases such as "I understand your frustration" or "It sounds like you had the best intentions; thank you for letting us know that your idea didn't work out" help to show your empathy. For more relational tools, see Chapter 4.

What's less important? Early in a relationship, a high level of *trust* is not likely present—you simply have not had enough experiences together to build trust. As such, you cannot expect that group members will share deeply personal experiences. However, gaining the group members' respect may be sufficient to allow the group to move forward and work together. In the workshop example, you need to establish your credibility by showing competence with the content and your facilitator role to gain the workshop participants' respect so they will remain in the room and engage in the workshop. As one interviewee stated, "I think it's important to establish your credibility first, before you try to move into being a little bit more friendly and personal. And I think that that's sharing research and explaining…why things are successful" (Interview 13). Additional strategies to show credibility include

- showing that you are prepared for the workshop (e.g., clear outline, handouts);
- being introduced by a member of the group to show their acceptance of you and your credentials;
- sharing your own experiences with the topic area (e.g., how you have applied the concepts in your own teaching); and
- conveying a balanced perspective on the topic (e.g., identify criticisms or gaps in the theory presented).

Coordination, or smooth interactions among group members, is also less important for rapport early in a relationship. Since your participants do not automatically know how to work together or do activities like a jigsaw, fishbowl, or round table (see Barkley, Major & Cross, 2014, for descriptions of these activities), part of your role is to provide clear instructions to assist with the lack of this coordination so that a group's time together is generative.

Reflection Point

Think of an example of when a short-term group did not work well. What facets of Figure 5.1 help to explain what happened? What strategies from this section could have helped to build rapport in this situation and possibly avoid what occurred?

Rapport for Longer-Term Groups

As suggested by Figure 5.1, building rapport has a temporal component. Although certain aspects, such as *mutual attentiveness* and *respect*, might be present early in the interaction, *trust* and *coordination* take time to develop. As an ED, you have the opportunity to work with longer-term groups in a variety of settings, such as multi-day workshops, committee work, or projects with colleagues. Here, our example is a four-day course-redesign retreat attended by 20 faculty members with diverse disciplinary backgrounds. This example may not automatically be perceived as a longer-term group, but these participants spend 30 hours together; while the timeframe feels compressed, the elements of rapport evolve during the workshop.

> The workshop facilitators include teaching centre staff and two faculty members who have previously completed the workshop. Each morning involves large group activities to explore key course design topics and strategies, and each afternoon has participants working in the same small groups (five participants with two facilitators). The afternoon sessions focus on individual design work and presentations of that work to their small-group members for feedback. The workshop concludes with

a showcase poster event of their “before and after” course outlines for their colleagues and senior administrators to view. How do we build rapport in this setting over time to help participants maximize their learning experience?

What is important at the early stage? All of the ideas shared for building rapport in short-term groups apply to this scenario as well. From the first day to assist with group forming, we encourage mutual attentiveness and respect by including various activities that encourage the workshop participants to share their teaching and course design experiences with one another. They are quite attentive because they know they will be working with a subset of their colleagues that afternoon and need to remember at least some shared details. As facilitators, we also work their comments into our examples and ask for their insights as ways of showing our respect for their experiences.

One key workshop design element involves building empathy, particularly between the facilitators and the participants. All of our facilitators clearly convey that they know the course design process is both rewarding yet challenging. However, from day one, our faculty facilitators share their experiences from when they were workshop participants. They candidly convey their frustrations with the process (and at times the staff facilitators!) in addition to their successes. By sharing their lived experiences, they help participants feel understood while also reinforcing that the design process we teach actually works. We also hold the workshop in a retreat-like setting and provide break food and lunches throughout each day to give participants a chance to connect with and learn about one another.

Positivity is also critical to build rapport early in the workshop. The small-group feedback on day one tends to be friendly and polite while the group members are learning about one another and their facilitators. But for maximum learning, this positivity cannot remain. Feedback on the course designs needs to become more balanced, including both strengths and areas for improvement, and the facilitators need to push the group members beyond the forming stage in a very short amount of time and tap into different elements of rapport.

What is important over time? Considering the stages of group development, the ideal goal is for groups to reach the Performing stage. In this phase, groups become problem-solving instruments and members achieve “insight into personal and interpersonal processes and constructive self-change” (Tuckman, 1965, p. 387). But to perform, the groups need to move through the storming and norming stages first, and various facets of rapport can continue to help.

As facilitators, supporting groups as they move through the storming phase can be a challenge. Resistance, both to the task and to others’ ideas, can occur during this phase. A few strategies involving rapport seem to help. First, particularly in the small groups, we continue to model and emphasize the importance of listening to, respecting, and being willing to consider everyone’s ideas rather than becoming defensive: ongoing mutual respect and attentiveness continue to be important. Modelling how to provide both positive and constructive feedback also helps, and it demonstrates that decreased *positivity* can actually help participants make progress on their designs. As well, we limit the time for resistance. By monitoring participants’ individual presentation time, facilitators limit the time for negative emotions and exchanges while giving all members equal time to get feedback on their design work.

Another element of the workshop’s design that assists with rapport over time is the consistent format used each day, particularly for the small-group work. These afternoon work sessions start with individual work time and consultations with facilitators followed by the presentations for feedback. A pattern begins to emerge and participants start to develop norms for working productively together so they can perform. Some prefer to do their individual work in a different room; others tend to connect with a particular facilitator. Norms emerge as well regarding how they give and receive feedback—a type of *coordination* develops in their feedback exchanges that facilitate their rapport in working together on their individual designs.

The participants' intensive experience also seems to help *trust* to build within the group over the four days and enable them to fully perform. They share their triumphs and their setbacks, their questions and their concerns. In essence, they become vulnerable together in this shared experience. Their participation in the final showcase, where they continue to give one another feedback, represents the culmination of their trust in one another as colleagues committed to enhancing their course designs.

Reflection Point

In this multi-day workshop, the intensive design compresses rapport building. What happens when the group meets less frequently, such as institutional committees or learning communities that meet monthly? How would you work to build trust and coordination when a group meets infrequently or when the participants change over time?

Special Case: How Pre-existing Relationships Can Help and Hinder

By now, you've read two different scenarios about working with groups and have heard how the various facets of rapport have more or less importance over time. In this section, we look at a specific instance that is likely to occur when we work with groups: pre-existing relationships with group members.

In particular, we focus on the situation of having a pre-existing relationship with only some of the group members. In this case, it becomes challenging to plot the relationship cleanly onto Figure 5.1 because there are multiple relationships at different stages. When can this situation be helpful for building rapport and when can it hinder?

At least two interviewees identified ways to use pre-existing relationships to assist with rapport. One indicated that EDs can leverage such relationships to encourage the development of trust with those unknown to us: "in many, many groups it's not that everyone there trusts you. That's then a process of using the people that trust you to gain the trust of the other people" (Interview 7). Another suggested that EDs can use the knowledge they have about some group members to help connect them with other members to facilitate rapport building: "if it's something that's…fairly common and they typically would talk about, sometimes I'll leverage that as a way to connect them with other people" (Interview 4).

These pre-existing relationships, though, do not always help us in our work with groups if our behaviour reflects a high level of rapport that we have yet to establish with all group members. Take for example the following scenario:

> You are invited to a meeting with a department's curriculum committee to consult on an upcoming curricular change. The senior administrator who facilitates this meeting has worked well with you on numerous projects for several years now, but other group members are completely unknown to you. As the meeting progresses, you have increasing concerns about a program that the group is leaning toward implementing. After you speak up and share your thinking, the room is silent. After the meeting, you hear that others thought you were too critical and abrupt. What just happened?

Figure 5.1 would suggest a few explanations. First, given your pre-existing relationship with the meeting facilitator, it may have seemed appropriate to provide negative feedback without balancing it with more polite, complimentary comments. You have had several candid exchanges with this person in the past and were acting in a similar manner at this meeting. If you had been meeting only with this person, your critical comments most likely would have been accepted since the importance of positivity for rapport decreases over time and your level of coordination was already high. But you had no pre-existing relationship or rapport with others at the meeting. Their need for positivity in exchanges was more important. Your behaviour may also have been interpreted as showing a lack of respect for their colleague and a lack of mutual attentiveness to everyone's ideas. The take-away from this situation is that you should approach rapport according to the length of the newest relationship in the group. You may have strong rapport with some group members, but if you are starting from scratch with others, you need to approach rapport with every group member as though you were at the early stage of a relationship.

Reflection Point

Consider the opening case about Noura and Sharmi. Over a number of meetings, Sharmi and Noura build rapport. Imagine that Noura invites Sharmi to run a workshop on large classes in her department. How might their pre-existing relationship help and/or hinder Sharmi's work with this group?

Summary

Building rapport in groups is complex due to the need to work with multiple people in the group. For short-term groups, mutual respect, empathy, and mutual attentiveness are the key elements for rapport. For longer-term groups, you also need to focus on trust, coordination, and positivity and on how their importance changes over time. We encourage you to consider your role in various groups, how pre-existing relationships might help or hinder your work, and how to support rapport building in your context.

Recommended Resources

Belbin, R. W. (2004). *Management teams: Why they succeed or fail* (2nd ed.) Oxford, UK: Butterworth-Heinemann.

Forsyth, D. R. (2010). *Group dynamics* (5th ed.). Belmont, CA: Wadsworth, Cengage Learning.

Lencioni, P. (2002). *The five dysfunctions of a team: A leadership fable.* San Francisco, CA: Jossey-Bass.

Schwarz, R. (2002). *The skilled facilitator*. San Francisco, CA: Jossey-Bass.

Chapter 6

Unfolding Rapport-Building Professional Development: Informational and Transformational Growth

Julie A. Timmermans and Carolyn Hoessler

With experience comes growth, and over time, rapport-building practice looks, feels, and is seen to be different:

> [Rapport building] feels genuine now, like I found my way into it. Where it's not all about me, and my rapport with someone. It's also about how do we together... instead of just building rapport and then moving forward on the consultation, it's also an ability maybe to facilitate rather than just consult...I feel more…psychologically aware or something. I've always been interested in dynamics, in people and in groups, but I think I have much more of a sense of my own ways of handling...my role...in that.
>
> (Interview 5)

Introduction

Throughout their careers, EDs grow in their thinking and practice of rapport building in two simultaneous ways: *informational* change in the types of tools or strategies an ED uses, and *transformational* change in their ways of thinking about self, instructors, and the rapport building process.

For Kegan (2000), "'Informative' learning involves a kind of leading in, or filling of the form...Trans-*form*-ative learning puts the form itself at risk of change (and not just change but increased capacity). … Both kinds of learning are expansive and valuable, one within a pre-existing frame of mind and the other reconstructing the very frame" (p. 49; emphasis in original).

In this chapter, we look at both types of growth, grounding our ideas in the rich interview data and in the body of Kegan's work (1982, 1994, 2000) in adult developmental psychology to describe how people grow in their rapport-building practice. Our intent is that EDs may come to see and describe their own growth journeys more clearly or be prompted to see growth in a new way. Experienced developers with mentoring roles may appreciate the language for foreshadowing and planning growth of others. Lastly, this chapter offers a new way to characterize growth in ED professional development.

Chapter Learning Outcomes

By the end of this chapter, readers should be able to:

- Distinguish between informational and transformational growth;
- Describe both types of growth as related to rapport building; and
- Reflect on their own journeys of development and identify places of recent growth, current stretching, and opportunities for further development.

How We Explored Growth in Rapport Building

At the core of understanding how we build rapport is the topic of rapport itself. To describe how EDs grow in their ability to build rapport, in this chapter and in this guide, we make rapport an "object" in Kegan's terms. In this way, rapport becomes something that "we can look at, take responsibility for, reflect upon, exercise control over, [and] integrate with some other way of knowing" (Kegan, 2000, p. 53), rather than being something that we cannot see—something that "has us." By making change and the growth processes explicit, this chapter aims to provide a way to name, reflect on, make meaning of, and direct growth in rapport building.

We also propose that a developmental perspective may be useful to study the dynamic process of building and maintaining rapport in EDs' work. More specifically, we propose Kegan's *Constructive-Developmental Theory* (1982, 1994). Through this lens, rapport may be considered something that is constructed by the individual and through interaction with others, and something that transforms through qualitatively different phases as an ED builds expertise. Even within this Constructive-Developmental approach, development is not linear and unidirectional, but, instead, it is likely to oscillate in a wave-like progression (King, Kitchener, & Wood, 1994, p. 140) between emerging and previous ways of knowing and being. Indeed, there is great cognitive and affective movement in the transitional space between successive ways of knowing. Inspired, too, by the work of Pitts and Miller-Day (2007), we examine the "upward turning points and positive rapport development across time" (p. 177). That is, we look for instances in the interviews that led to building and maintaining positive rapport between EDs and clients.

The rapport-related informational and transformational growth journeys described in this chapter arose from this focus on turning points and the approach of inductive content analysis. The themes arising from the specific lists of informational growth tools and the three transformational ways of seeing are described in the next sections. The lens of Kegan's approach arose following our discussions after the initial coding of interview quotations about how rapport building has changed.

Two Simultaneous Growth Journeys: Informational and Transformational

During individuals' growth in rapport building, there are two simultaneous, sometimes circuitous, journeys. One journey is about increasing tools and skills related to building and maintaining rapport. Another is about changing the ways of knowing and the habits of mind and heart related to maintaining and building rapport. Both journeys are necessary and both are valuable (Kegan, 2000). The figure on the following page is an attempt to capture these simultaneous journeys of informational and transformational growth in rapport building.

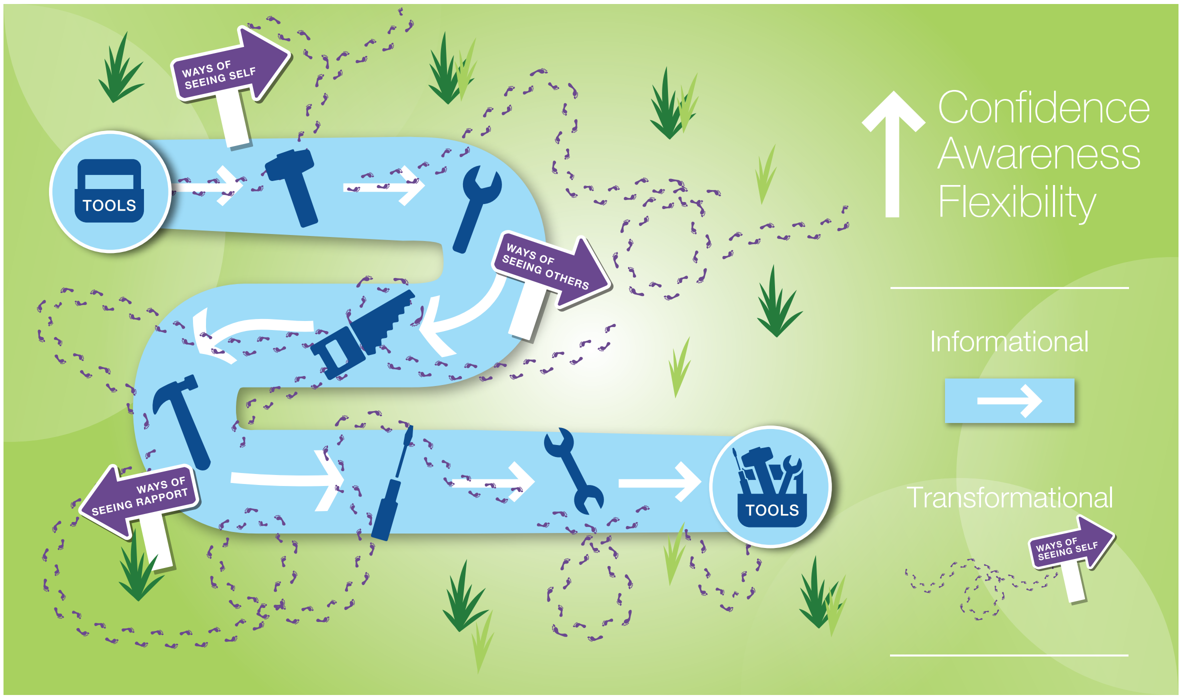


Figure 6.1: Two simultaneous pathways of growth: Informational and transformational

Informational Change—Growing One's Information Toolbox

> Learning aimed at increasing our fund of knowledge, at increasing our repertoire of skills, at extending already established cognitive capacities into new terrain serves the absolutely crucial purpose of deepening the resources available to an existing frame of reference. Such learning is literally in-form-ative because it seeks to bring valuable new contents into the existing form of our way of knowing. No learning activity, discipline, or field is well nourished without continuous opportunities to engage in this kind of learning. (Kegan, 2000, p. 49; underlining in original)

Types of Informational Tools

Through an additive and linear progression, informational learning adds more pieces to an ED's rapport-building toolbox. The term toolbox arose in interviews (Interviews 1, 2), noting the content- and resource-focused nature of informational learning.

Within the context of rapport building in educational development, the following tools were added to the rapport-building toolbox:

- teaching and learning knowledge;
- drawing on other people;
- policies and political elements of the institution;
- tales of similar issues;
- techniques for difficult consultations; and
- bits of knowledge about disciplines and people.

> my actual toolbox itself has grown. Because as I go to workshops, seminars, read more, talk to people, make new connections, all kinds of things, my toolbox just gets bigger, so I have more things to draw on as an ED when I meet with folks.
>
> (Interview 2)

Information changes in an ED's rapport-building practice are observable in, for example, the understanding of the institution's policies and politics (tool type 3). For someone newer to the institution, or newer to educational development, the politics may be less well known:

> I don’t have as established of an understanding and appreciation for the politics within the institution and the connectedness of things. For instance, when I speak with our <senior leader for teaching>... he knows how everything’s connected... [and] sits on a number of committees... [When] I’ll try to solve an issue, or try to answer something without, I’ll be focused on the micro and he’ll be looking at it from sort of a meso-macro perspective. And I won’t have thought about... the larger issues... that’s sort of where the intermediate-highly developed developers are that I need to get to. (Interview 6)

> When I started working with the engineers my background was in <humanities>, so I would talk about my <family member> who is an engineer. And we would start a lot of conversations that way and...it seemed to give them the sense that...I had some understanding of what engineers do and...what the program is like...So, trying to find...connection points.
>
> (Interview 14; tool type 6)

In contrast, a more experienced ED observed:

> The more time I spend here, the more I’m able to understand the kind of broader context in which we work. And not just ‘we’ being me at the <centre>, but ‘we’ being <Institution> as a place...I have a better understanding as time goes on of some of the policies that come down, some of the political pieces...so that I’m not kind of coming into a consultation and being sort of blinded by all the other pieces that are happening that are often quite important when we’re working with people. (Interview 2)

Prior experiences can offer tales of similar instances of an instructor’s challenge, or provide insight into likely challenges (tool type 4):

> Because I have seen similar situations, so I have more of a reference or advice to build on, or I can anticipate what types of things they might need in a particular department or faculty...[or] stage of their career... When you can say with a similar issue, I’ve seen other colleagues who have found x really useful. And that helps build credibility and rapport with faculty as well. (Interview 7).

Prior consultations can also provide tested techniques that can be added to your toolbox (tool type 5):

> If I’ve had success with one or two people, then that gives me strategies to use. The next time I encounter somebody, I think, oh, that person’s a little bit like that person I worked with three years ago, and that might help me to find a way to connect with them. (Interview 9)

Reflection Point

- What resources, theories, and examples do you draw on?
- What prior instances or examples do you draw on in your rapport building?
- What knowledge of your institutional or departmental culture do you have?
- What further tools do you want to acquire?
- How might you seek these additional tools?

Transformational Change

In addition to informational gains to *what* EDs know, EDs can grow in terms of *how* EDs know. This process of transformational learning is iterative, with growth being non-linear and involving experiences of tension, clarification, possible regression, and then integration.

In order to talk about transformation, we need to be clear about the form that is transforming to be sure that what we are describing as *transforming* is an identifiable entity. “If there is no form,” Kegan writes, “there is no transformation” (2000, p. 48). Transformation, thus, involves both the forming (construction), as well as the reforming (development), of this form. This, then, is the dynamic motion of transformation: the shaping and reshaping of our ways of knowing (Kegan, 2000).

In rapport building in educational development, we propose that the transforming forms are our ways of seeing self, our ways of seeing others, and our ways of seeing rapport. These encompass the ways of knowing and enacting the three facets of rapport (trust, empathy, and mutual respect). As the core facets, or forms, of rapport evolve, expand, deepen, and transform, so too would the outcomes of rapport mentioned in Chapter 2, including openness for sharing ideas and risk-taking to try something new, as mentioned in the interviews.

Entering the Eddies of the Transformational Journey

Opportunities for transformative learning arise from an individual's experiences. From a developmental perspective, for a transformational change to occur in a current way of knowing, the equilibrium of this way of knowing must be disrupted. That is, a person must perceive information, knowledge, an experience, or a phenomenon to be somehow surprising (Murphy, 2003), discrepant (Pintrich, Marx, & Boyle, 1993), disorienting (Mezirow, 2000), or perhaps even troublesome (Meyer & Land, 2003; Perkins, 1999). In one of the interviews, for example, an ED revealed coming to see her own values more clearly through the concerning experience of confronting the contrast between her values and those of a colleague: "We don't have a common value system around what we really need to be doing in this work" (Interview 8).

A question then remains: What turning points (Baxter & Bullis, 1986; Bolton, 1961), epiphanies, and/or disorienting dilemmas (Cranton, 1996; Mezirow, 2000) might instigate transformational changes in the development of EDs' ways of knowing related to building and maintaining rapport?

Expanding Ways of Seeing Self, Instructors, and Rapport

With respect to educational development, transformational learning about rapport appears to shift how EDs see themselves, the instructors with whom they build rapport, and the rapport-building process. While transformational pathways are individual and contextual, insights from interviewed colleagues' experiences found in these quotations are intended to provide insight into the often-implicit changes and the potential directions for growth.

Ways of Seeing Self

As transformation occurs, EDs shift how they see themselves. These identified changes are noted here with examples from the interviews:

- **Being more confident and comfortable:** rapport building "feels genuine now" (Interview 5);
- **Recognizing their own values:** an ED recognizes, for example, their own values around rapport building in contrast to colleagues' approaches (Interview 18);
- **Clearly defining their role in rapport building:** "my role is to be that of a mentor to help guide and support people in certain directions" (Interview 18); and
- **Recognizing the importance of self-development:** for example, recognizing the need for "explicit skill building [as]...critical" in addition to a "natural affinity for rapport building" (Interview 19).

Case #3 Reflection:

In what ways might Hasan and Lydia's differences reflect their own values, how they see rapport building, and how they see themselves?

Ways of Seeing Instructors

EDs also shift how they see the goals and views of instructors with whom they are building rapport. These identified changes in how EDs see instructors are noted here with examples:

- **Focusing on their needs and goals through exercising empathy:** "it's essential to respect people's views" (Interview 1), to "start with their goals" (Interview 7) and to know "what their abilities are, what they're ready to hear, what they're ready to cope with...that's the only way you can be truly effective" (Interview 19);
- **Recognizing and respecting how their disciplinary world views shape the way they define and approach problems:** when identifying shifts in how they built rapport, "disciplinary ways of thinking was a huge one" (Interview 7);
- **Seeing instructors as trying to be good teachers:** "we're all trying to be good teachers, and I know that. I know that now" (Interview 10);
- **Recognizing that change is challenging on multiple levels:** "often we're suggesting a change in practice, and we have to recognize that that can be really daunting for people, especially when they're really busy doing other things" (Interview 14).

> Focusing on their needs is seen in Case #1 when Sharmi acknowledges Noura's concern with, "I'm hearing that time is a challenge for you but you want to get students talking."

Ways of Seeing Rapport

In interviews, experienced EDs often commented on both earlier stages and later stages of rapport building, and in comparing these stages, several key shifts were revealed:

- **Increased awareness and consciousness about rapport as part of the consultation process:** "Before it was sort of unconscious; now I'm a little bit more conscious about it and … take steps to make it more overt, and I actually deliberately do it as opposed to just something that I normally do anyways" (Interview 4);
- **The process of rapport building becomes more tacit:** "the first thing is you're consciously thinking about what you're doing as you're doing it. And like 'oh, am I doing the right thing? Am I taking too much time on this or that?' And as you gain experience that becomes like second nature to you" (Interview 1);
- **Shift away from a focus on specific steps and resources to seeing the purpose and process:** this includes related affective shifts to being calmer and less worried (see illustrative quotations below); and
- **More complex and layered view of rapport building:** "I think it's got more layers of understanding: the why, the how, the when. I just feel like it's more multilayered. It's less reaction and more planned" (Interview 5); and
- **Direction of learning changes:** It is no longer about what the ED does "X→Y" or the sharing back and forth "X⇆Y"; rather it becomes about the whole together "(X Y)". As one ED described, their way of seeing consultations and rapport started with "the empty vessel model" (Interview 3).

> **Case #2 Reflection:**
>
> How might Paulo's existing ways of seeing self, instructors, and rapport building shape his reflections about his experience with Cecilia?

Voices of Educational Developers' Transformative Learning

Over time, and as EDs gain experience, how EDs see the purpose and process of rapport building shifts. These full quotations capture the transformational growth and semi-tacit awareness of change and reforming into current practice:

> When I began I was structured…always focused on finding a solution…now over these four years I feel much more relaxed, open, and flexible. I let the person dictate the agenda, and sometimes solutions and resources aren't necessarily part of it…sometimes instructors simply want to be heard or to bounce ideas around…and that's okay now. Whereas before I wasn't sure that was okay. (Interview 6)

> Early on I was keeping more to a script … to ask people lots of questions about what they did and how it was going, and now I probably get to the point a little bit faster. (Interview 7)

One interviewee later added the following reflections:

> Early in my career, I was more ego driven … I wanted to solve the problems, I wanted to have the magic tool that I could hand them that would fix all of their problems. And I think I was immature in my understanding of the necessity of change happening within that other person. That the tool or the resource was only as useful as their willingness and their ability to use it… I think early in my career I was much more in a hurry to solve a problem, you know, get on to the next person kind of thing. As if it was, I don't know, some concrete object that I could just fix and set aside and move onto the next one. But you're dealing with people and it doesn't work that way. I came to realize, and I think those nonverbal things were part of the signals, that it took time for people to both be ready to hear what might be the right solution, or perhaps much more importantly to realize for themselves what they needed to do next. And I became more willing to slow down and take the time for that to happen, recognizing that that would result in much more lasting and significant change or growth. (Interview 19)

Seeing rapport differently also includes affective changes in one's experience of building rapport and may entail being less worried, calmer, and less secretive:

> When people start out they're really worried about the expertise piece. So they're worried about people taking them seriously, and they're worried about kind of establishing their knowledge. Right? Because they think that you want people to think that you know something, otherwise why would they come and talk to you? (Interview 9)

> I sort of look back very fondly at my own self and I sometimes see elements of that eager beaver … And when I see some of my colleagues who are newer at it … going to build rapport… they've got the planks over their shoulder and the tool belt and everything, I feel like pulling them back into my office and saying "[Y]ou know, it's actually just there and you just have to let it blossom." And I see myself now, I'm much calmer and much more willing to just believe that, that it's there and … it's like weaving rather than building. (Interview 10)

> [I] tend to frame it as we're having a conversation. I don't think of it as being secretive or a consultation, but it's like we're here to have a conversation and you have some things that you want to bring and we'll just dialogue about that and see where it goes and I'll see what I can do to help you get where you want to go. (Interview 11)

Such transformative learning shifted and continues to shift how individuals see themselves, the instructors with whom they are building rapport, and the nature of rapport building and consultations. These habits of heart and mind shape ongoing practice and professional development.

Reflection Point

Your transformations:

- How have the ways you see yourself changed?
- How have the ways you see others changed?
- How have your ways of seeing rapport changed?

Identifying a turning point:

- Thinking back, try to identify an instance that caused a shift in the way you think about rapport.
- Were you able to integrate this new perspective immediately, or did it take time? What or who helped you to integrate?

Caveat

We acknowledge diversity and individual variation among experts in the ways of conceptualizing and enacting rapport and do not mean to imply a uniform model of rapport building. We also acknowledge that the depiction and development of rapport building as we present it here may represent a North American perspective, and may consequently not be a good fit across the different cultural contexts in which educational development is practiced. Finally, we acknowledge that, while informational change is additive and generally easier, transformational change may be murky and may be accompanied by affective transitions and upheavals, particularly in a domain such as rapport building. We look forward to examining more closely the affective transitions in rapport building in future work.

Summary

Growth in rapport building includes an expanding informational toolbox of skills and knowledge about rapport, teaching, politics and policies, and the transformational conceptual shifts in how EDs see rapport, themselves, and the people with whom they build rapport. The changes can be implicit, visible only through careful reflection, as well as murky and challenging. By identifying one's current place in the transformation cycles, celebrating one's growth so far, and identifying needs for further growth, individuals continue to grow their rapport-building capacities.

Recommended Resources

In addition to this guide on rapport building, which may prompt a turning point for you, we recommend reading Kegan's original work for a greater understanding of informational and transformational change:

Kegan, R. (1982). *The evolving self: Problem and process in human development.* Cambridge, MA: Harvard University Press.

Kegan, R. (2000). What "form" transforms? In J. Mezirow & Associates (Eds.), *Learning as transformation: Critical perspectives on a theory in progress* (pp. 35-69). San Francisco, CA: Jossey-Bass.

Chapter 7

Mentoring Educational Developers in Rapport-Building Skills

Kim West and Roselynn Verwoord

Introduction

Take a moment to consider your experience when you began your career. When did you first learn about rapport and its role in educational development? Was building rapport with instructors a skill you were already comfortable with or one you first had to learn and then practice? Did you ask your ED colleagues for support or did you receive any formal or disciplinary training on how to build rapport with instructors?

Mentorship, the focus of this chapter, is an important way for EDs to learn and grow in their rapport-building skills and knowledge, and is one of the ways EDs can share their experiences about rapport with their colleagues. In this chapter, we'll share some of the informal and formal ways that EDs learn about rapport from the EDs who were interviewed for this guide. Traditional models of mentorship usually focus on a single relationship in which an experienced person (or mentor) shares their knowledge with a less experienced person, or mentee (Sorcinelli & Yun, 2007). In this chapter, we'll discuss how collaborative models such as peer, mutual, group, reverse mentoring and networks (Beane-Katner, 2014) can benefit EDs who wish to learn more about or reflect on rapport in different stages of their career development.

The remainder of this chapter will focus on mentorship strategies. Because much of what people already know and understand about rapport is implicit (see Chapter 1), EDs who mentor colleagues about rapport may face challenges in making their knowledge and skills more explicit. Drawing upon Margolis's (2007) work, we'll discuss how EDs could be more explicit about the thinking and reasoning processes behind the actions they take to build rapport. Using Case #3: Working with Colleagues and advice from EDs who were interviewed for this guide, we'll discuss how EDs could adapt five techniques for making their thinking more explicit (Margolis, 2007). By the end of this chapter, we hope that EDs will consider adopting some of the techniques discussed in this chapter to more explicitly model and share how they think about and build rapport with others.

Chapter Learning Outcomes

By the end of this chapter, readers should be able to:

- Identify some of the informal and formal ways that EDs learn about rapport;
- Consider the benefits of collaborative mentorship programs for EDs reflecting on or learning about rapport in any stage of their career; and
- Adopt techniques that make thinking and reasoning processes more explicit when mentoring or sharing advice about rapport with other EDs.

Mentorship Models for Learning About Rapport

Traditional mentorship practices are based on an apprentice-expert model wherein a more experienced mentor provides guidance and expertise to a mentee. This model tends to be structured toward a one-on-one relationship and is not ideally suited for an educational development context, as new EDs often enter our profession with a variety of disciplinary backgrounds and training (McDonald & Stockley, 2010). Mentorship models thus need to represent the diverse needs of EDs within our profession:

> When I work with nurses…developing rapport is something that they…are also trained to do. So they just kind of automatically do that, right, as the way of approaching an interaction, whereas for other people, I mean, it may come naturally to them but it's not necessarily part of their professional training or their…work…it's not top of mind for them the same way, or it's not habitual for them the same way. (Interview 9)

Mentorship can be informal, if EDs voluntarily receive or ask for advice on rapport building, or formal, if integrated as part of training or a structured program. Collaborative models can also be formal or informal and are well suited for EDs in any stage of their career who wish to learn from one another. Informal mentorship typically arises as EDs ask each other questions or for advice, for example after a particularly challenging consultation. Depending on the context, more scaffolded approaches, such as modelling and shadowing, may be informal or formal. Formal mentorship practices are outlined in Figure 1 and are discussed in detail in the section that follows.

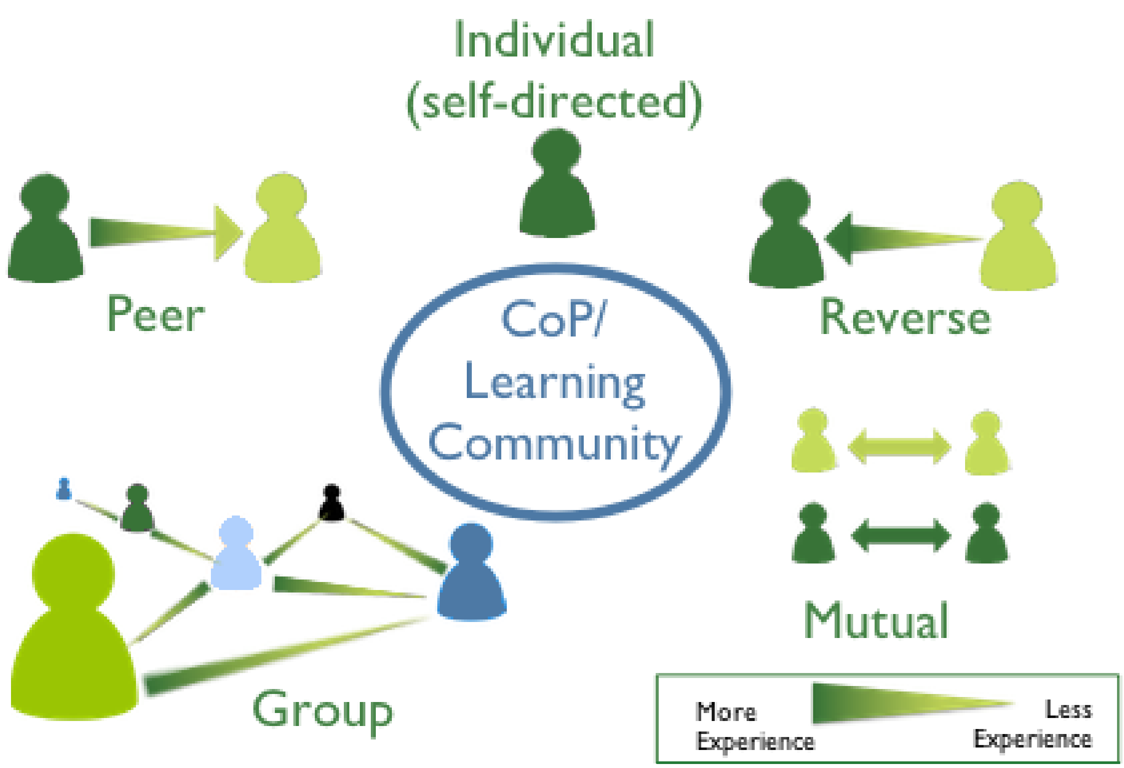


Figure 1: Formal models of mentorship (adapted from Beane-Katner, 2014)

Peer Mentoring

Peer mentoring involves two peers engaging in mentoring (Beane-Katner, 2014). In this relationship, one ED usually has more experience than the other, and thus the more experienced ED chooses to mentor the less experienced ED. Peer mentoring can naturally arise between colleagues in educational development who ask each other for advice; however, peer mentorship in many professions can be limited when underrepresented individuals face isolation and thus engage in this type of mentorship less frequently (Bova, 2000).

Peer mentorship, like all mentoring, also requires trust and rapport. Reflecting on the process of building rapport within a peer mentor relationship, one ED shared:

> So I feel like I'm doing two things at once, I'm building a rapport with a fellow staff member, so on one hand I'm trying to build a rapport that we're equal colleagues that can work collaboratively together. However, at the same time I have so much more experience that there is a kind of senior/junior thing, even though I think she's actually older than me. So there is some strange dynamics there. (Interview 3)

EDs identified modelling and taking a staged approach as two approaches to peer mentoring. Modelling that arises informally may involve observing how colleagues build rapport with instructors, for example, in a meeting, during a project or during a teaching workshop, as this ED describes:

> Lots of times we have opportunities…to collaboratively work on a project. When that happens I'm always cognizant that I can have an opportunity to mentor by… modelling some of what I do or how I approach particular issues or the design of a particular program [or] a workshop. And I think that gets noticed, and that's my intent obviously to be the guide on the side so to speak. (Interview 18)

A more formal approach to modelling might include discussing strategies with a colleague before or after the observation takes place.

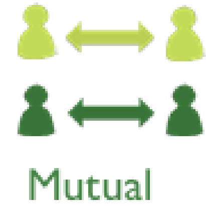
EDs described staged approaches as a specific type of formal approach in which a less experienced ED learned through a case study/strategy session, shadow consultation, and feedback from a more experienced peer. One ED's experience reflected this process:

> …start with having a consultation, and after the consultation bringing in a junior educational developer. Use the case study approach where here's what happens, here's what they asked and I said, and now this is what they're going to do, what would the next meeting look like? Or how can we approach this? And sort of have it as a strategy session so they can see what you're thinking and how you thought about it and make suggestions, and you can challenge the suggestions or learn from them as well.
>
> The next progression is to bring them in for consultations so they're actually part of the consultation. Once they've done that a few times I would give them somebody that I've had a continuing relationship with. You tell them look, we have a junior person and I'd like you to come and talk to them and sort of stage it a little bit and then get their feedback. You know…as a faculty member in a consultation, how did it go? How do you feel about it? And that's really important feedback I think for a junior educational developer. (Interview 12)

Peer-mentoring practices such as modelling and staged approaches are useful because they help less experienced peers to develop more knowledge of rapport and rapport-building skills. At the same time these practices allow less experienced peers to observe the interpersonal communication aspects of rapport including indicators of rapport (see Chapter 4). For experienced EDs, modelling provides an opportunity to reflect on rapport-building strategies, including when and why these strategies were used, and to share these reflections with their peers. Staged approaches, in particular, benefit EDs who enter educational development with little preparation or training in rapport.

Mutual Mentoring

Mutual mentoring involves EDs as mentees learning from one another. Many EDs are inherently effective at this style of mentoring, given the focus that educational development has on improving teaching and learning. One could speculate that, to improve teaching and learning, EDs need to value learning, share strategies for improving learning with others, and continue learning from others. This is mutual mentoring. As one ED described, “I often share stories with people about approaches that I’ve taken or things that didn’t work out very well or worked well” (Interview 9).

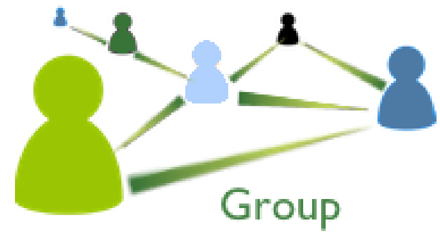


Group Mentoring

Building on the concepts of peer and mutual mentoring, group mentoring involves EDs offering their insights to other EDs in a group setting. Mentors can be peers with varying levels of experience. Group mentoring differs from the other types of mentoring in that it is conducted in a group setting rather than an individual setting. The size of the group might vary from one context to another; one ED highlighted the larger educational development community as the context for group mentoring by stating

> one way that I’ve been able to [see] what a good educational developer is, is by looking at the people who constantly are posting on the list-serves. And being able to see ‘oh, what are they talking about, what are they doing, what resources are they mentioning. (Interview 2)

Another example of group mentoring identified by EDs is the Instructional Skills Workshop and Facilitator Development Workshop (http://www.iswnetwork.ca). One ED identified these workshops as “the one best workshop” for new EDs “because there’s so much rapport building, and using facilitator language, and practicing in some challenging situations” (Interview 1). Similarly, the new faculty developer institute was also mentioned for its focus on modelling and building relationships:



> The facilitators were able to…draw you in, work with you, have you live and experience, and then through that modelling of being so attentive to who we were and our building relationships with one another, the whole piece around sending, sending us out now into the field of educational development with the confidence, if you’d like, to really do well. (Interview 18)

Mutual and group mentoring equally benefit EDs in differing contexts. As EDs, we often find ourselves on both sides of an equation—as learners and sharers. This means that during our careers, we will likely need and be able to offer different types of mentoring. Group mentorship, in particular, may emphasize a variety of different ways of thinking about, engaging in, and modelling rapport.

Reverse Mentoring

In reverse mentoring, a more experienced ED learns from a less experienced peer who shares newly-acquired knowledge on rapport, as well as different skills and strategies (Beane-Katner, 2014; Carmin, 1993). This type of strategy could work well in learning about rapport group settings, such as the ISW or FDW, or the EDC Institute, where EDs of different experience levels could learn from sharing ideas with one another. Experienced EDs often benefit from reverse mentoring with a reinvigorated practice.

Like peer mentorship practices, reverse mentorship has its limitations as experienced EDs are less likely to seek out guidance or advice from newer EDs. However, some experienced EDs who were interviewed made an effort to connect with their less experienced colleagues:

> I think [new EDs] need…mentoring with a more experienced educational developer. I find ways to…approach these people and say, you know, “welcome; I’m here, I’ve been here doing this kind of work for some time. You know, if you have any particular questions, don’t hesitate to chat with me, let’s go for coffee.” (Interview 18)

Most newer EDs, however, had the opposite experience in that they had to seek out mentors:

> we were mentored only if we needed mentoring. In other words… if there was a perceived need for me to be mentored, if I had a question, or somebody felt I was doing something incorrectly or inefficiently. That's when I was sort of approached if you will. In a very collegial way I have to say that, it wasn't… like I was…called to the principal's office or anything. (Interview 6)

Self-Directed Learning

Self-directed learning occurs when EDs sought out mentors and other informal opportunities to learn about rapport. One of the most common challenges discussed by EDs was the lack of support around rapport building early on in their careers: "I have seen new educational developers come in and be thrust immediately into a particular major project. And to me, that's...somewhat concerning. I think they need some type of initiation and mentoring with a more experienced educational developer" (Interview 18).

One of the challenges identified with self-directed learning was the overall lack of formal training and directed opportunities for learning about rapport in educational development. As this ED notes,

> I see lots of [people] who need or want some training, some one-on-one coaching, some resource-sharing, etc. To help them get there, or to help them feel more confident. Like take me when I was just starting, really... not confident, and having to struggle through that process relatively by myself... I felt too scared to tell anybody that I felt I didn't belong… So, you know I'd love to see the EDC create a mentoring program, whether it's…online, in some cases online might be even better because you can connect with someone outside of your unit, which creates safety, I think. You could share things that you can't always share with other staff, or you're worried about sharing with other staff…I...really believe that the folks in the EDC community would be happy to be mentors. I just think they haven't been asked… (Interview 2)

Thus, more formal models of mentorship around rapport building will lead to more effective practices across the ED community by providing more diverse levels of support and opportunities for meaningful collegiality (Beane-Katner, 2014).

Mentoring Networks

Developing a mentoring network (a network wherein different forms of mentoring are available) is a strategy for developing "multiple layers and types of support" (Beane-Katner, 2014, p. 93). As EDs we are always learning and growing. To meet our evolving needs as learners, we need different types of mentoring for different purposes and for different lengths of time (p. 93). Mentoring networks could consist of all or some of the formal mentorship models outlined in this chapter (Beane-Katner, 2014) and would benefit EDs across the country by sharing, discussing, and modelling approaches to rapport building.

Reflection Point

- Identify which models of mentorship you have experienced? Which ones might you seek next?
- Applying the concept of a mentoring network to a group context, what could a mentoring network on rapport building look like across the ED community?
- What might a mentoring network for EDs look like within an individual college or university?
- Could EDs within a single institution explicitly create various opportunities for mentoring such as peer mentoring, mutual mentoring, group mentoring, and reverse mentoring? What would this look like?

Mentorship Strategies

Rapport as Implicit Knowledge

Mentorship can be challenging because much of what people already know and understand about rapport is implicit (see Chapter 1; Chugh, 2015). To illustrate this, one ED used an analogy of learning to ride a bike to describe learning about rapport: “How do you teach someone to ride a bicycle? Sometimes you just need to shove them. They think you are holding onto the back of the bike, but you’re not” (Interview 1). This same analogy has been discussed in the scholarly literature (Eraut, 2000) to contrast implicit and explicit knowledge (Polyani, 1958; 1966):

> For example, a person may be very aware of being able to ride a bicycle and able to describe how they learned to do it, without being able to describe critical aspects of the knowledge gained, such as rapid responses to a sense of impending imbalance, while other relevant knowledge, such as the steadying of the gyroscopic motion of the wheels, would almost certainly never be acquired. No doubt a physicist could compile a video of someone finally achieving competence and provide a commentary, but it would be difficult to claim that this represented the knowledge of the average cyclist. (Eraut, 2000, p.118)

Just like when riding a bike, EDs may not be aware of the knowledge they possess about rapport or how and why it is valuable to others. For instance, an ED may be able to share the rapport-building techniques that they used in a consultation with a colleague but not be able to explain why those techniques worked or when they knew to use them. Through mentorship, EDs can observe what worked, didn’t work and why. Through dialogue, EDs may acknowledge difficulties, explain decisions, and ask questions. One of the EDs interviewed for this guide agreed:

> Seeing it modelled by other people is probably one of the best ways to …get a good idea of what that [rapport] might look like. It’s different for everyone. I mean, how [a person] builds rapport would be different than I do, but even seeing some of the strategies…setting up the classroom environment…body language…that kind of thing…I like to learn it through watching others. (Interview 4)

Margolis (2007) suggested it might not be enough to observe, imitate, or even practice skills in a mentorship context. He suggests “bearing witness to high levels of teaching success does not automatically transfer teaching skills to the observer” (p. 76).

Five Strategies for Making Implicit Knowledge More Explicit

In his study, Margolis (2007) identified five techniques that can make teachers’ thinking more explicit:

Technique #1. Sharing Struggles and Brainstorming Solutions

Technique #2. Modelling Specific Approaches and Explaining Rationales

Technique #3. Team Teaching

Technique #4. Learning Together

Technique #5. Mining Mistakes

Similarly, to mentor effectively, EDs need to be explicit about the thinking and reasoning processes that are behind building rapport. In this next section, we’ll use the context of Case #3: Working with Colleagues to demonstrate how EDs could apply some of the techniques Margolis outlined to make their thinking around rapport building more explicit.

Case #3 Reflection: Two colleagues, Hasan and Lydia, are engaged in the rapport dynamics of a peer mentorship context. Depending on power dynamics, workplace culture, and many other factors, peer mentorship might be more complex and nuanced than other types of mentorship situations. As one ED notes, "So I feel like I'm doing two things at once, I'm building a rapport with a fellow staff member, so on one hand I'm trying to build a rapport that we're equal colleagues that can work collaboratively together. However, at the same time I have so much more experience that there is a kind of senior/junior thing, even though I think she's actually older than me. So there is some strange dynamics there" (Interview 3).

Technique #1: Sharing Struggles and Brainstorming Solutions: Parker Palmer (2010) has written extensively about the culture of fear in academia; in mentorship fear might stem from mentors seeing themselves as experts rather than co-investigators of learning. Margolis (2007) cited research by Trubowitz and Robin (2003) that highlighted the role of empathy in sharing frustrations and previous successes. Through admitting past failures and mistakes, a peer demonstrates vulnerability, and in so doing, may help to cultivate openness and trust in the relationship.

It is often easiest to see where this goes wrong instead of right. For example, in Case #3, neither Hasan nor Lydia meaningfully share with each other the philosophical reasons behind their approach to planning a teaching portfolio workshop. In this situation, Hasan or Lydia could choose to express vulnerability by sharing a previous experience or by explaining the rationale behind their philosophy. In a rapport-building context, peers could discuss assumptions that they made or failed attempts at building rapport, sharing what they learned from their experiences. Another way to demonstrate openness is for peers to model how to be receptive to change, as this ED notes:

> when you're consulting with them, show them how you an be open and receptive to feedback. So you ask them…how am I doing with this consultation? Or was that useful to you? Or, is this too much stuff, or is there a different way you'd like to receive this information? Just to show that that you can be a practitioner of something with willing[ness] to change. You're open to that. (Interview 5)

Once struggles are shared, peers can learn from one another by brainstorming solutions to the expressed issues. In Case #3, Hasan and Lydia jumped to brainstorming solutions before truly expressly their issues with each other. A technique to keep in mind during this stage is to establish a respectful environment where it is safe for both peers to disagree and where the expertise of both peers is honored. As this ED says,

> honor the expertise the mentee is bringing to the situation and the role. Engage the mentee in conversation, discuss how and what you've [both] learned. They are your peer so you have to establish that environment where you can disagree with each other... That takes time. Some people are more comfortable with that than others. And everyone has to find their [own] way. (Interview 7)

Cohen (2010) discussed additional techniques that could be adapted for creating respectful interactions in this context.

Technique #2: Modelling Specific Approaches and Explaining Rationale: Margolis (2007) defined pedagogy of explicitness as a process in which mentors model their ways of thinking and decision-making. Useful techniques in this regard could include peers asking questions, attempting to predict the outcome of a situation, exploring personal connections or connections to other ideas/situations, and explaining their decisions and the results of their decisions (Schoenbach, Greenleaf, Cziko, & Hurwitz, 1999). Consider the technique that Margolis terms a think-aloud as mentioned by one ED:

> I certainly had experiences where we were…in a consultation and then after the meeting we debriefed and…the colleagues I was participating with would comment on why they asked certain questions or why certain things they did not ask about. That behind the scenes look of this was a good time to ask about X and not a good time to ask about Y. (Interview 8)

These think-alouds provide opportunities to ask and reflect on the question "why," which is important to modelling the thinking or reasoning process behind the actions taken. This technique also builds upon technique #1 because it helps to create empathy between peers, and in this case, a more meaningful and shared understanding of why a peer took the actions that he or she did.

Techniques #3 and #4: Team Teaching/Coaching/Learning Together: Margolis (2007) describes these techniques as forms of reverse or reciprocal mentorship in which all members of the team learn mutually from one another and participate as valued colleagues in the learning process. Margolis lists team teaching and learning together as separate techniques; for our context they could refer to situations where peers co-lead consultations (team teaching) or where peers debrief and reflect with each other (learning together). In Case #3, Hasan and Lydia are planning and teaching a workshop together. However, they could also be learning together if they share their struggles, approaches and rationales during this process. In the spirit of true reciprocal mentorship, peers must be equally willing to learn from one another.

Team teaching and learning together are important practices for EDs to consider when deepening their reflective practice, in this case, contributing to an awareness and understanding of teaching styles that differ from their own. As was quoted in the reflective questions for Case #3, "To build rapport you don't have to like the other person's model of the world, or agree with it, but you have to at least understand it" (Barkley, 2017).

Technique #5: Mining Mistakes and Taking Risks

Furthermore, sharing struggles may help peers to demonstrate their vulnerability and build trust with one another. It can also result in solidarity in the sense that no one is alone in making mistakes, no matter if the eventual outcome is good or bad. As bell hooks (1994) noted, "I do not expect students to take any risks that I would not take" (p. 21). When peers engage in risk-taking together, they create a truer collaborative partnership that can lead to reciprocal growth and change, as opposed to one peer being the expert. A collaborative partnership is one in which peers can more openly ask questions, discuss outcomes, and explain the rationale behind decisions made with one another. So, as this ED notes, challenge yourself to be uncomfortable:

> what I think I would recommend to newer people is to undertake professional development things where they…themselves are sometimes uncomfortable. Like the way that an Instructional Skills Workshop can sometimes unsettle you. Be open to that, and think a lot about feedback. (Interview 5)

Peer learning also relies heavily on shared understandings and as such it requires a high degree of trust (Goffin & Koners, 2011). Discussions on building trust in Chapters 1 and 2 as well as coaching methods in Chapter 8 should provide you with additional guidance on how to work toward these desired interactions and outcomes in peer mentorship.

Reflection Point

- Reflect on your implicit knowledge of rapport by thinking about a situation when you were successful in building rapport and another when you were not successful. Write down what you did to build rapport and the reasons why. If you were to now explain what you did and why to a colleague, what would you say? What techniques would you apply from this chapter to help make your thinking or reasoning processes more explicit?
- With a peer, role play Case #3: Working with Colleagues. Use this as an opportunity to think aloud the decisions that Hasan and Lydia each make in this scenario.

Summary

Rapport is a tacit type of knowledge that requires mentors and mentees to work together and more explicitly share their rapport- building knowledge and strategies with each other. This chapter has reviewed five mentorship approaches for learning about rapport (individual, peer, group, mutual, reverse) and five different techniques for sharing with your colleagues how you think about and build rapport with others. We hope that you will continue to reflect on rapport within your educational practice and to build upon ways to model rapport with others by building upon the techniques shared in this chapter.

Chapter 8

Building Rapport among Teaching Centre Staff through Organizational Coaching

Natasha A. Kenny

Introduction and Outcomes

Often described as agents and advocates for positive change, EDs depend on brokering relationships, fostering collaboration, inspiring meaningful dialogue, and enabling actionable change (Taylor, 2005; Timmermans, 2014). The essence of our practice and success is grounded in our ability to build rapport with others, whether in our roles as individual practitioners and scholars, or as leaders within our teaching and learning centres. Chapter 1 of this guide emphasizes that characteristics such as trust, empathy, and mutual respect form the core foundation for building rapport in educational development. How then do we foster such experiences with the staff we supervise in our roles as leaders and managers in a teaching and learning centre?

As I embraced my leadership role as a manager and later as a director of an educational development unit, I faced a steep learning curve related to my responsibility of fostering a positive work culture where individuals who contributed to the mandate and goals of our unit felt engaged, connected, and motivated. Through conversations with colleagues in other organizational contexts and various professional development opportunities, I became immersed in literature and practices related to the power of coaching. McLean, Yang, Kuo, Tobert, and Larking (2005) defined *coaching* as "a set of managerial skills that demonstrate effective coaching characteristics in terms of openly communicating with others, taking a team approach to tasks, valuing people over tasks, and accepting the ambiguous nature of the working environment for the purpose of developing employees and improving performance" (p. 163). Through coaching, leaders shift their focus from telling employees what to do to improve their work to actively creating an environment that enables employees to identify goals and to discover solutions and opportunities on their own (Ladyshewsky, 2010). Coaching aims to optimize an employee's performance, skills, satisfaction, fulfillment, engagement, and well-being (Theeboom, Beersma, & van Vianen, 2014). Research indicates that coaching can contribute to enhanced individual and organizational performance, a shared sense of trust and respect, and improved employee engagement (Ladyshewsky,

Chapter Learning Outcomes

By the end of this chapter, readers should be able to:

- Critically reflect upon how coaching behaviours can be used to build rapport; and
- Apply coaching behaviours in performance management to build rapport with individuals who work within their unit.

2010; Theeboom et al., 2014; Wheeler, 2011). Coaching has been shown to have significant positive effects on an employee's performance, well-being, coping, work attitudes, and self-regulation (Theeboom et al., 2014).

We build rapport by developing a sense of connection with others. Coaching provides a powerful vehicle through which to create this sense of connection—conversation. Coaching conversations are driven by questions, which stimulate ideas, reflection, and shared dialogue, to inspire action and growth. It seems only natural that EDs adopt a coach approach to their leadership practices. The ability to engage and enable others in finding their own solutions is a key characteristic that EDs identify in effective academic leaders (Taylor, 2005), mirroring EDs' abilities to "[create] the space for growth to occur" (Interview 5). To build rapport, coaching provides a foundation for sustaining a positive relationship that is grounded in trust, respect, idea generation, and a fundamental belief in the potential and capabilities of others (McCarthy & Milner, 2013).

This chapter explores how leaders and managers within teaching and learning centres can use coaching strategies to build rapport with individuals who work within their centre. It is written for those currently in a management or leadership role and for those aspiring to transition into these roles. Many of the strategies discussed also have broader applicability to our educational development practices, especially related to the everyday conversations we have with instructors, students, and administrators. The chapter starts with an overview of coaching behaviours and then provides practical examples for applying these behaviours in performance management processes. Quotations gathered through interviews with EDs across Canada's post-secondary landscape (see Chapter 1) are incorporated throughout to further draw upon the community's wisdom, experience, and understandings of rapport.

Coaching and Rapport

Ellinger and Bostrom (1999) described coaching behaviours that fall into two clusters—empowering and facilitating (Table 1). They emphasize that these behaviours are implemented with the intent to foster employee learning and development. Although coaching and mentorship certainly share some similarities, in contrast to the mentorship approaches discussed in Chapter 7, coaching focuses less on our ability to directly share our knowledge, experiences, advice, and expertise with others, and more on our ability to help others identify goals, and uncover solutions and actions for moving forward on their own. As Michael Bungay Stainer (2016) shared, coaching requires us to say less, and ask more. Like the mentorship approaches discussed in Chapter 7, coaching is based on cultivating a reciprocal relationship founded on trust, respect, and empathy—qualities that are discussed as core facets of rapport earlier in this guide (Chapter 1). Coaching is also strongly centred on a growth mindset, which Dweck (2006) described as a belief that, through continued learning and effort, we "change and grow through application and experience" (p. 7).

Table 1: Coaching Behaviours (Summarized and Synthesized from Ellinger and Bostrom (1999))

Behaviour	Description
Empowering Behaviours (Enabling the Learning Process)	
Question Framing	Asking thought-provoking questions to stimulate ideas and encourage employees to discover solutions
Providing resources and removing obstacles	Providing access to resources and removing roadblocks to help employees achieve goals
Transferring ownership	Supporting accountability; ensuring employees can take ownership and responsibility for their work and decision-making
Holding back answers and solutions	Consciously holding back solutions and promoting self-discovery

Facilitating Behaviours (Promoting new Understanding and Perspectives; Offering Guidance and Support to Foster Learning and Development)	
Providing and soliciting feedback	Openly providing feedback on strengths and areas for improvement; encouraging critical reflection; soliciting feedback from multiple perspectives and points of view
Working things out together	One-on-one conversations with the intent to openly and honestly discuss problems, develop strategies, and discover solutions
Creating a learning environment	Creating informal learning opportunities, fostering the development of mentorship opportunities and relationships
Setting and communicating expectations	Clarifying expectations and identifying how goals and objectives are connected to the bigger picture (e.g. organizational vision and goals); promoting a sense of belonging
Shifting and broadening perspectives	Stepping into others' shoes; experiencing others' perspectives; seeing things from a new point of view; envisioning new possibilities
Using analogies, scenarios, and examples	Drawing upon relevant stories, analogies, and examples to facilitate learning
Engaging external resources and personnel to facilitate learning	Providing access to external learning resources and development opportunities

When I first arrived in my role as director at a new academic institution, I needed to take the time to connect and build rapport with those who worked in my unit. As I embarked on this process, I quickly embraced coaching as a leadership approach. Table 1 shows how coaching is used to build rapport. By genuinely asking thought-provoking questions to uncover others' perspectives and listening openly and honestly without judgment, coaching allows us to demonstrate respect and empathy for others' points of view. By consciously holding back our input and advice and focusing instead on developing strategies and solutions through dialogue and self-discovery, coaching enables staff to take ownership of their own learning, development, performance, and success. Through authentic one-on-one conversations that create opportunities to openly discuss the challenges staff face, coaching provides a framework for leaders and employees to build mutual respect by working challenges out together. Perhaps most importantly, coaching allows us to intentionally establish a learning environment that promotes self-efficacy, autonomy, and growth, thus providing a means for leaders to actively demonstrate trust and confidence in the abilities and potential of others.

Figure 8.1 further illustrates that we can build rapport with our staff through the reflective, generative, and affective dimensions of coaching. As discussed in Chapter 2, the foundational qualities of trust, empathy, and mutual respect are core not only to developing rapport, but also to supporting a professional relationship that flourishes over time. As leaders, we can draw upon the reflective, generative, and affective dimensions of coaching to foster rapport, to build positive relationships with our staff, and to explore the inherently complex and often vulnerable challenges they regularly face. Through curiosity-driven, solution-focused dialogue, coaching provides an opportunity for us to demonstrate empathy for and a shared understanding of the needs and challenges of our centre staff.

As coaching is fundamentally grounded in trust, curiosity, humility, learning, and compassion (Hargrove, 2008), it is interesting to reflect on the dynamic and reciprocal nature of coaching and rapport. In our leadership practices, we can use coaching as a vehicle to build rapport with others. At the same time, characteristics of rapport, such as fostering a sense of connection, trust, empathy, and mutual respect, are fundamental to sustaining a positive coaching relationship. In this way, coaching helps to build rapport and positive relationships between centre leaders and staff. The core facets of rapport (trust, empathy, mutual respect) must also be intentionally cultivated to sustain a successful coaching relationship.

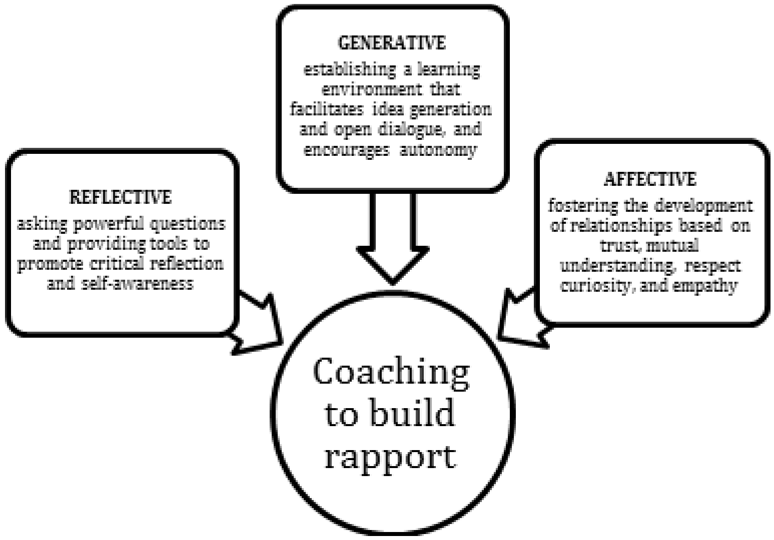


Figure 8.1: Conceptualization of using the reflective, generative, and affective dimensions of coaching to build rapport with employees.

Coaching and Performance Management

Most new leaders and managers grapple with the challenge of how to meaningfully engage staff in performance management processes. Unlike an annual performance appraisal, performance management focuses on a continuous and iterative cycle of goal setting, open conversation, feedback, coaching, training, and improvement that is typically facilitated through the following processes: 1) goal setting, 2) ongoing coaching conversations, 3) formative mid-term performance conversations, and 4) an end-of-year performance review (Aguinis, Joo, & Gottfredson, 2011; Bouskila-Yam & Kluger, 2011; Gruman & Saks, 2011). The following section highlights how I have intentionally incorporated coaching to enhance performance management with the staff in my centre. I emphasize a series of processes and guiding questions to help build rapport with employees through four foundational stages of performance management:

- strategic and strength-based goal setting;
- ongoing coaching conversations;
- mid-term formative performance review conversation; and
- collaborative end-of-year performance review conversation.

As highlighted in the introductory chapters of this guide, each organizational context and culture is unique and these strategies can be broadly adapted to meet the specific needs of each leader, staff member, and centre.

Strategic and Strength-based Goal Setting

Goal setting is a central component of coaching that ensures staff can take ownership of their work and decision-making. Through goal setting, we build rapport by ensuring staff develop a sense of belonging in terms of how their work fits within the larger whole. Goal setting also helps to develop a mutual sense of trust and accountability by clarifying expectations for performance, identifying how their strengths, needs, and interests align with their goals, and ensuring staff can take ownership of and responsibility for their work. The questions presented in Table 2 help guide staff as they articulate their annual goals. Here, we focus both on their professional goals, which help to advance the unit's and institution's strategic priorities, and the staff member's learning goals, which help to support their ongoing development and the unit's commitment to creating a culture of learning and growth.

Table 2: Guiding Questions for Establishing Professional and Learning Goals

Professional Goals	Learning Goals
• What specific and measurable goals will I achieve? • How will these goals contribute to the unit's key strategic priorities? • How do these goals build upon my strengths and interests? • How will I know that I have been successful in achieving these goals? • What timelines and milestones will I set to achieve these goals?	• What specific learning goals will I achieve? • What knowledge, skills, and abilities do I want to further develop? • How will these goals contribute to my growth in our unit? • What learning experiences and actions (e.g. conferences, courses, workshops, personal learning) will I take to achieve these goals? • What support will I need to achieve these goals?

Each year, staff are encouraged to reflect upon and identify their goals based on these questions. We then meet for a coaching conversation to review and collaboratively discuss their goals with questions such as

- What are your most important and meaningful goals? What goals will have the highest impact? For you? For your team? For the unit?
- What goal(s) will stretch you? Which will foster the greatest learning, growth, and development?
- What goals build on your strengths, passions, and area(s) of interest? What goals most excite you?
- How are these goals aligned with the unit and institution's strategic priorities?
- How can I best support you in achieving these goals?

To build rapport with staff, I listen actively during this conversation to help them discover and articulate the deeper meaning and intent of their goals within the context of the organization, their team, and their own personal and professional development. Through this process, I leverage the reflective and generative dimensions of coaching for rapport (Figure 8.1). The self-reflective nature of the guiding questions in Table 2 act as prompts for us to develop a mutual understanding of the appropriateness of their goals within the context of their development and the unit's and the institution's strategic priorities. Our shared dialogue generates new ideas and insights and provides clarity to ensure their goals are both meaningful and achievable.

Through coaching, it is imperative to reinforce the following fundamental questions within these contexts: why are these goals important? why do they matter? and what impact will they have? To further create a sense of enablement, we develop a mutual understanding of the resources needed to support the employee in achieving their goals. We also ensure that there will be opportunities to revisit these goals as organizational contexts and priorities shift throughout the year. Through this goal-setting conversation, we can establish what was identified in Interview 3 as a partnership toward action.

Ongoing Coaching Conversations

Ongoing coaching conversations are facilitated through 1) regular one-on-one monthly updates and 2) day-to-day coaching conversations as challenges, issues, or opportunities arise. Past research confirms how important regular conversations are to performance-management processes and to sustaining relationships that are based on learning, connection, and trust (Ladyshewsky, 2010; Ellinger, Bachrach, Wang, & Bas, 2011). Akin to the explorative nature of active listening discussed in Chapter 4, we build rapport by asking open questions, engaging in deep listening, actively seeking to understand what others are experiencing, and collaborating to explore strategies and solutions for moving forward. As was stated in Interview 10, this process is about “letting the other person and the other person’s stories fill the space between us.” Through these regular conversations, we establish an ongoing relationship based on trust, curiosity, mutual understanding, respect, and empathy (Figure 8.1).

To ensure that staff have the time to step back, reflect upon, and discuss their progress and priorities, I schedule 60-minute monthly updates with each person. These conversations help us reflect on accomplishments, uncover challenges, and identify the resources and supports needed to ensure success. Our monthly updates are based on questions and prompts such as

- Tell me more about what has happened over the last month. What is on your mind?
- What have been your key accomplishments and successes? What are your proudest of?
- How have you progressed toward your goals?
- What barriers or obstacles have you encountered? What are your options for moving forward?
- What will you do next? What are your key priorities for the next month?
- How can I be of further support?

As a leader, I have also worked to establish a culture that provides the space and time for our staff to regularly drop by my office to discuss ideas, challenges, and opportunities as they arise. This learning culture is based on a fundamental trust in their capacity to generate ideas and discover solutions and actions for moving forward. Recognizing that the best coaching happens through these conversations, I view these opportunities as some of my most important leadership commitments.

Often, I have found that employees simply need a space for someone to listen and talk through their concerns and ideas. As was identified in Interview 9, this process is often about being able to “reinforce people’s own good ideas.” If they have hit a roadblock or experienced a failure, our focus is not to place blame, but rather to develop an understanding of the factors that led to this situation, identify steps for moving forward, and develop strategies for preventing this challenge from occurring again. This future-oriented, learning focus is key to building rapport, sustaining trust, and improving performance (Ladyshewsky, 2010). These conversations are also grounded in questions that encourage self-awareness, self-reflection, and self-efficacy (Ellinger & Bostrom, 1999; Joo, 2005; McCarthy & Milner, 2013). Here, we see the reflective dimension of coaching (Figure 8.1) for rapport clearly resonant.

Although it takes conscious effort, my goals during these meetings are to let questions be our guide and to provide as little direct advice as possible. For example, if a staff member is facing a particular challenge, it is easy to slip into the trap of disguising advice as a question, “What about trying [insert possible solution]?” Instead, through the coaching behaviours and dimensions highlighted in Table 1 and Figure 8.1, we can ask questions to stimulate ideas and solutions, consciously hold back our own answers and solutions, focus on working things out together, and draw upon past experience to help staff discover and identify key actions for moving forward. Figure 8.2 presents an example cycle of coaching questions to inspire growth-based dialogue.

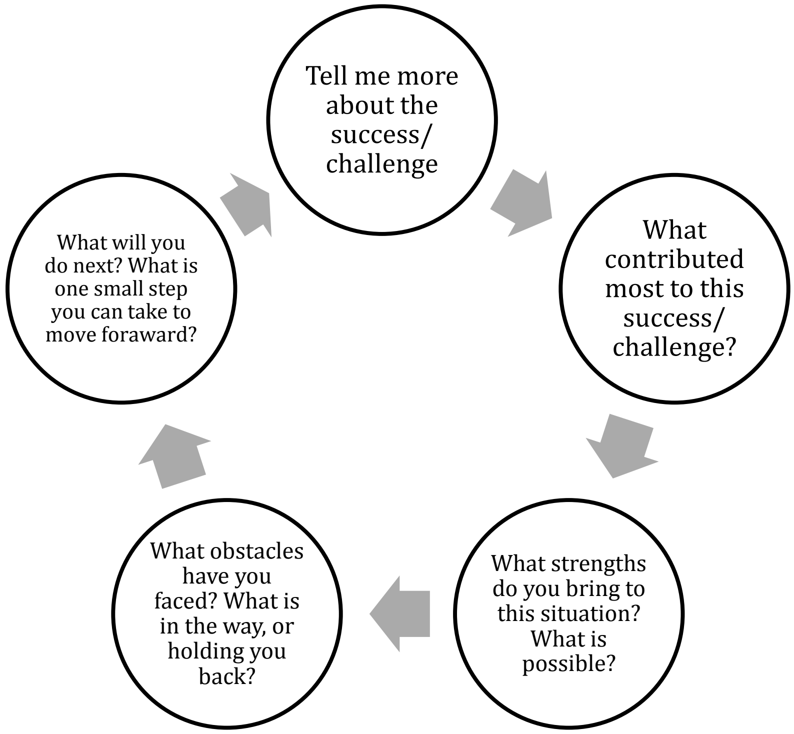


Figure 8.2: Example coaching questions for growth-based dialogue

Mid-term Formative Performance Review Coaching Conversation

The mid-term performance conversation provides another opportunity for staff and me to revisit their goals and learning plans, celebrate their achievements, identify actions for moving forward, and discuss how I can best provide support. In my unit, this process is guided by a series of questions that we come prepared to discuss during a mid-term performance management conversation (Table 3).

Table 3: Questions to Guide a Mid-term Performance Management Conversation

Employee Questions for Reflection	Leader Questions for Reflection
• What have been your key accomplishments and successes over the past 6 months? What are you proudest of? • How have you progressed toward your goals? • What do you find most satisfying about your work? • What would you change about your job? • In what areas have you improved? • In what areas would you like to improve? • What actions will you take in the next 6 months to improve in these areas, and to further progress toward your goals? • What changes could I, as your supervisor, make to my leadership approach to further support you in your success?	• In what areas has the employee performed well? What are their accomplishments and successes? • How have these accomplishments and successes helped the unit achieve its priorities and goals? • In what areas has the employee improved? • In what areas could the employee continue to improve?

Rather than telling the employee what to do or how to improve, my focus is on providing a supportive space and process for them to intentionally reflect upon and identify directions for ongoing development. As outlined in Chapter 3, this supportive space can be created through the physical environment and through verbal and nonverbal cues that promote positive interaction and rapport.

Supporting a process of self-reflection and discovery is critical to providing an opportunity for the employee to first share their responses to the above noted questions for reflection. Typically, for the first half to three-quarters of this 60-minute conversation, my role is to listen deeply to the employee's reflections, asking only a few probing questions for clarification as needed to ensure mutual understanding. During the last portion of the meeting, I add to the employee's reflections and provide formative feedback as required. I highlight how the employee's accomplishments have helped the unit achieve its priorities and goals, thus showing that I recognize their contributions' importance and value. We also clarify the specific resources and actions that we will both commit to further enable their success. To foster an ongoing sense of transparency and to document their progress, our reflections and the outcomes of this conversation are summarized to ensure mutual understanding and a collective sense of accountability of our key commitments. This process helps to provide a tangible opportunity to modify their goals based on shifting units or institutional priorities and serves as a basis for documenting their progress in our end-of-year performance review.

Collaborative End-of-Year Performance Review Coaching Conversation

To emphasize the reflective dimension of coaching for rapport (Figure 1), prior to meeting for our end-of-year performance conversation, employees complete a self-evaluation, reflect upon their goals, document their successes, and make note of any areas for improvement. This year-end meeting helps us build upon our discussions from throughout the year. By engaging in an ongoing performance-management process, we have developed a mutual awareness of their ongoing progress and any additional contexts that have impacted their progress throughout the year.

Table 4 provides guiding questions for our year-end performance-review conversation. Through this discussion, we share a rich dialogue related to their performance, progress, learning, and contributions to the unit's and organization's success. Like the mid-term performance conversation, this discussion starts with the employee's reflections on their performance, with me listening intently to their input. Following their reflections, I share specific feedback on their performance and how it has contributed to the larger organization. Through these questions, we are able to openly and honestly discuss their strengths, accomplishments, key areas of growth, and areas for future improvement. As I engage in an intensive annual reporting process myself, I draw upon my own experience to demonstrate an empathic understanding of the inherently vulnerable nature of the performance-management process. Our coaching conversations throughout the year have helped to sustain ongoing dialogue and a shared understanding of their achievements, as well as the obstacles and challenges they have faced. The result is an authentic conversation that is based on a collaborative commitment to the staff member's growth and ability to flourish within the organization.

Table 4: Questions to Guide an End-of-the-Year Performance Management Conversation

Employee Questions for Reflection	Leader Questions for Reflection
Thinking back to your goals and achievements last year, • In what areas have you performed well? What are your accomplishments and successes? • In what areas have you improved? • In what areas would you like to further improve? • What actions will support these areas of growth and improvement? Thinking forward to your work next year: • What are you most looking forward to? What do you find most satisfying about your work? • What would you change about your job? • What changes could I make to my leadership approaches to further support you in your success?	• In what areas has the employee performed well? What are their accomplishments and successes? • How have these accomplishments and successes helped the unit achieve its priorities and goals? • In what areas has the employee improved? • In what areas could the employee continue to improve?

Summary

This chapter has provided an overview of how coaching can be used within an organizational context to foster rapport by developing a learning culture that helps employees discover and embrace their potential. A coaching approach requires leaders to let go of control and the desire to tell employees what to do and to focus rather on asking powerful questions and providing a positive space that inspires reflection, dialogue, action, and ongoing learning. Although questions provide a vehicle for the coaching process, at its core is an affective experience that is based on building relationships grounded in trust, care, concern, compassion, and a core belief in others' potential. Admittedly, developing coaching competence takes time. However, once we experience the ability to lead by seeing ourselves as a facilitator of learning that helps others

Reflection Point

- Considering your past work experiences, which leaders have best fostered the coaching behaviours presented in Table 1? How did this influence your level of engagement, work performance, sense of belonging, energy, or well-being?
- Which coaching behaviours presented in this chapter most resonate with you? Why?
- As you review the coaching behaviours presented in Table 1, where are your strengths? Which behaviours are you most confident implementing into your leadership and management practices? Which ones are you least confident implementing into your leadership role? Where would you like to further develop and grow?
- How could you further implement coaching in your leadership and management practices?
- How could coaching be further incorporated into your or your organization's performance management and development processes?
- As a leader, how would you use the coaching behaviours illustrated in this chapter to support Paulo following his challenging consultation (Case #2 presented earlier in this guide)?
- As peers, how could Hasan and Lydia draw upon coaching behaviours, to further understand each other's perspectives (Case #3 presented earlier in this guide)? As a centre director, how could you use the coaching behaviours presented in this chapter to help Hasan and Lydia move forward?

develop a strong sense of self-awareness, autonomy, self-efficacy, and belonging with an organization, coaching becomes core to our way of being.

Recommended Resources

Bungay Stainer, M. (2016). *The Coaching Habit Say Less, Ask More & Change the Way Your Lead Forever.* Toronto, ON: Box of Crayons Press.

- A practical guide for everyday coaching conversations.

Hargrove, R. (2008). *Masterful coaching.* San Francisco, CA: Jossey-Bass.

- A seminal resource that describes coaching strategies, processes, and approaches.

Kimsey-House, H., Kimsey-House, K., Sandahl, P., & Whitworth, L. (2011). *Co-active coaching: Changing business, transforming lives.* Boston, MA: Nicholas Brealey Publishing.

- A foundational guide that gets to the heart of coaching.

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References for All Chapters

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Appendix: Questions for Facilitating Reflection and Discussion Provided Prior to Interviews about Rapport in Educational Development Consultations

1) What?—How would you describe Rapport?

There are many ways to express what normally is implicit or unsaid, some possible ways you might consider:

- Using a metaphor
- Describing what Rapport looks like? Feels like?
- Drawing a picture
- Drawing a Venn diagram with overlapping characteristics of rapport
- Capturing in a Wordle, brainstorm list or word cloud
- Sharing an example
- Finishing the phrase "Rapport is…"

2) Why?—What is the relevance or significance of rapport?

What types of growth occurs in the instructor as a result of rapport in consultation, for example in…

- Instructors' experience during consultation
- Instructors' knowledge, values, skills
- Instructors' response to contextual supports and challenges
- Instructors' use of knowledge, values and skills (in teaching, leadership…)
- Their students or colleagues' knowledge, value, skills, or relationships with the instructor
- Institutional culture or change (adapting Guskey, 2000)
- What are the outcomes of having rapport?

3) How?—Building Rapport

Share a story or example of successfully building rapport with an instructor. What do you think went well and why?
+ A story or example of when building rapport was unsuccessful with an instructor. What do you think went wrong & why? **OR** Describe a typical consultation (e.g. teaching philosophy statement). How do you go about creating rapport before (in prepping for the consult), during, and after the consultation? THEN Question—for example ask

- How did you know when you were (un)successful in building rapport?
- What elements do you think made this relationship what it is today?
- What you say and do? How do you communicate and set up a welcoming environment? What are some of the interpersonal actions, nonverbal communication, etc?

Stretching the concept, in one of many ways:

- Does rapport look different with different instructors?
- Does rapport look different with one individual or a group?
- Can you unintentionally build rapport?
- Is rapport transferrable when recommending a colleague?
- Do we ever need to renegotiate rapport?

4) When?—Mapping Change

We have questions about

- Has the way you have defined rapport changed throughout your career as an ED? In what ways?
- Was rapport always part of your consultations or did it appear later?
- What did rapport look like or feel like or focus on at different times in your career?
- Have the methods you use to build rapport changed from the beginning of your career to where you are today? Why or why not? How or how not?

But, there are many ways to express what normally is implicit or unsaid, some ways you might consider:

- Using one ore more metaphors
- Sharing a story
- Articulating a journey
- Drawing a picture; Drawing a process diagram
- Drawing a storyboard; Sketching a timeline
- Capturing experiences at different stages in Wordle(s)
- Sharing a series of examples
- Finishing the phrases "Rapport was…" "Rapport became…"

5) So What?—Mentoring

In considering how to mentor new and continuing EDs, respond to the question or questions that appeal to you:

- How do we mentor new EDs? How can we? How do we mentor continuing EDs? How can we?
- How do we know what is needed and what is best for consultations?
- How do you become adept at developing rapport? What advice would you give to someone new to developing this skill as an ED?
- How do we mentor continuing EDs in further enhancing, developing, and reflecting upon rapport as a skill?
- What role does rapport and/or relationship building play in your own development and growth as an ED, and why is this important?