

Problematizing leadership learning facilitation through a trickster archetype: An investigation into power and identity in liminal spaces

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Abstract

This study uses the archetype of a ‘trickster’ to reflect back on, and hence problematize, the role of the educator/facilitator identity in leadership learning. This is based on the view that a trickster is a permanent resident in liminal spaces and that these liminal spaces play an important role in leadership learning. Our approach was based on the reading of the trickster literature alongside reflective conversations on our own experiences of facilitation of leadership learning, development and education. We suggest that paying attention to the trickster tale draws attention to the romanticization of leadership development and its facilitation as based on a response to crisis that leads to a further enhancement of the leader as a hero. Hence, it also offers ways to problematize leadership learning by uncovering the shadow side of facilitation and underlying power relations. We therefore contribute by showing how, as facilitators, we can use the trickster archetype to think more critically, reflectively and reflexively about our role and practices as educators, in particular, the ethical and power-related issues. In our conclusions, we make recommendations for research, theory and practice and invite other facilitators to share with us their trickster tales.

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Introduction

This study situates the authors within a trickster-type tale to analyse experiences of facilitating leadership learning. As such, we take note from others that have taken more of an anthropological (e.g. Edwards, 2015; Jones, 2005, 2006) and ethnographic (e.g. Sutherland, 2018) approach to studying leadership. We use interpretations of the ‘trickster’ archetype to reflect back on, and thus problematize, the role of the facilitator or educator within leadership learning, education and development. The study takes a reflective approach in two interconnected ways. Firstly, by analysing the narrative within the trickster story and its role in conceptualizations of liminality and, secondly, by reflecting on our own ‘trickster tales’. We use this latter exercise to critique our experiences of facilitating leadership learning and education. In doing so, we highlight how leadership educators/facilitators are implicated in the romanticization of leadership development that is based on the response to wicked problems (Grint, 2005) in a context of crisis constructing (where crisis is seen as a socially produced and discursively constituted and often reflects the orientation of those in positions of power – leaders) (O’Reilly et al., 2015; Spector, 2019).

We believe that our reflective approach through situating ourselves within a trickster-type tale enables us to challenge the facilitator role in this context that continues to work towards the creation of the heroic ideal of leaders (O’Reilly et al., 2015; Schweiger et al., 2020) as corporate acolytes (Hopfl, 1992). Hence, our study argues that we, as leadership learning facilitators, are performatively positioned as trickster archetypes through these crisis-constructing processes. Hence, we feel exploring ourselves as tricksters, and its inherent uncomfortableness will help to further challenge the development of corporate acolytes who situate themselves in the space of leadership in organizations. Our study demonstrates how paying attention to trickster archetypes in leadership learning and pedagogic practice can open up and problematize these romantic/heroic ideals in line with more critical approaches to understanding leadership development and practice (e.g. Edwards et al., 2013; Carroll and Nicholson, 2014; Collinson and Tourish, 2015; Harrison, 2017).

We also contribute by opening up new lines of scholarship in connection with liminal spaces by showing that the trickster and perhaps other occupants of liminal spaces besides liminal subjects themselves offer important insights for scholars and practitioners into leadership and organization studies. Hence, this study contributes by extending conversations about liminality (e.g. Bamber et al., 2017; Beech, 2011; Clegg et al., 2014; Daskalaki et al., 2016; Hay and Samra-Fredericks, 2016; Ibarra and Obodaru, 2016; Pöyhönen, 2018; Sturdy et al., 2006), in relation to leadership learning (Hawkins and Edwards, 2015), and learning more generally (Izak, 2015), from the perspective of the facilitator and educator of learning, rather than the recipient. In doing so, we also add further insights to the existing research on the facilitator role in leadership education (e.g. Iszatt-White et al., 2017; Nicholson and Carroll, 2013; Sinclair, 2009; Smolović Jones et al., 2014), problematizing the role of the educator or facilitator by revealing its occasionally trickster-ish characteristics.

From this problematization, we believe we contribute to the leadership learning literature in three ways. Firstly, we reveal the trickster/facilitator (alongside the protagonist/learner) as an important occupant of liminality in leadership learning. Secondly, we show how, by placing the trickster in this space, the ethical issues entangled in a liminal learning space become more readily visible. We also take note here of the political anthropological work of Horvath and Szokolczai (2018) where they highlight the potential use and abuse of liminality where uncertainty and anxiety occur. Similar to

Zueva-Owens (2020) and Kostera (2008), we see the importance of using archetypes in enabling us to see and understand important phenomena that may be otherwise invisible. Lastly, we believe this enriches the awareness of ambiguity or the ‘shadowy nature’ (Nicholson and Carroll, 2013) of leadership development initiatives. The study proceeds by firstly drawing out a deeper conversation around power and identity in facilitating leadership learning, and then, the study looks to delve into the place where ‘the trickster’ resides – liminal spaces – and highlights potential gaps in our understanding that we hope are addressed by our research.

Power and identity in facilitating leadership learning

Crucial to exploring our research are the power relations embedded in the management and leadership learning context. The literature reveals several pertinent factors. These include the elevated position of ‘educators’ as purveyors of legitimate knowledge (Nicholson and Carroll, 2013) and the way that (Western) management education is considered to be coded with assumptions that privilege white, able-bodied, Anglo-Saxon men (Kelan and Jones, 2010). These factors condition both the enacted relationship between the educator and student and also the way that management knowledge comes to be understood, categorized and ranked, by students and other academics, in terms of importance and validity (Nicholson and Carroll, 2013). The role of power relations in the liminal learning experience is not yet fully unravelled by scholars, and we cannot fully accomplish this here. However, applying a trickster lens to our roles as facilitators of leadership learning and development extends conceptual understanding about the contribution of the facilitator to leadership learning, education and development. This is with an eye on the politicized ‘identity workspace’ (Petriglieri and Petriglieri, 2010) that is performatively created through a context of crisis constructing (O’Reilly et al., 2015; Spector, 2019). These entwined understandings of self, others, what learning is and how it is valued are not neutral but shaped by dominant narratives in management pedagogy (Iszatt White et al., 2017). These narratives (often privileging masculinity, capitalist growth and short-termist competitiveness over other ways of understanding the socio-economic context) have become known as the ‘hidden curriculum’, an implicit, unintentional set of ‘meta-messages’ (Blasco, 2012) which socialize us into accepting certain assumptions about how the world works and what concepts like ‘leadership’ are for in organizational and social contexts.

There are already hints in the literature that the trickster archetype may have something to offer: Nicholson and Carroll (2013) refer to the facilitator role as implicated in the ‘un-doing’ of identities in leadership development, drawing attention to the facilitator’s role in shaping the kinds of leadership knowledge that come to be seen as legitimate. Similarly, Smolović Jones et al. (2014) identify the facilitator role as a ‘pinch-point’ in the leadership development process. Furthermore, Sinclair (2009)’s examination of seduction in leadership development demonstrates that facilitators are embedded in dynamics of desire and a process of seduction or ‘leading astray’ (a term that resonates particularly with the trickster archetype, as we show below).

Lastly, and most recently, Iszatt-White et al. (2017) highlight issues of shifting from taken-for-granted aspects of identity as teachers or ‘masters of theory’ to educators as facilitators or ‘guides on the side’. They conclude by identifying an ‘educator paradox’ – a contradiction between enacting critical management education that also inadvertently reinforces traditional education practices. Iszatt-White et al. (2017) go on to encourage educators and scholars to be aware of this paradox when facilitating learning on leadership, especially from a critical perspective. Taking heed of this message, we develop a deeper sense of our place in the educator paradox by focussing more clearly on the liminal aspects of learning and our role as a permanent resident (from the perspective of students) in this liminal space. In this sense, educators are, like Bamber et al. (2017) academics

(discussed further below), locked into an in-between state, or left behind when the student protagonist eventually moves on out of liminality.

We therefore adopt similar methods to those of [Sinclair \(2009\)](#) and [Iszatt-White et al. \(2017\)](#) with reflections and reflective conversations about our own involvement in leadership development linked to a reading of the trickster material. We believe our reflective approach provides a deeper sense of the dualistic challenges faced in teaching and facilitating leadership learning experiences, by uncovering and exploring the sense of 'being trickster-ish'. Both [Iszatt-White et al. \(2017\)](#) and [Nicholson and Carroll \(2013, pp. 1240–1241\)](#) accounts of 'identity struggles' in leadership development reflect the facilitator's need 'to play different roles' to support leadership development groups. This struggle seems to manifest itself through the authority of the facilitator and is problematized through power constructs of the facilitator, the learner and the tension between constructivist and normative understandings of leadership. Before going on to describe the trickster archetype and our use of it in exploring these issues of power and identity, we first explore liminality in a little more detail.

Liminality and leadership learning

Following [Tempest and Starkey \(2004\)](#) characterization of individual and organizational learning as liminal space, [Hawkins and Edwards \(2015\)](#) suggest that students' experiences of learning leadership are characterized by liminality – a transitional moment 'in and out of time'. Within these spaces, previous understandings of concepts like leadership are suspended, and individuals and groups (here, learners) try out new ways of understanding the self and the world they inhabit. Liminality is noted by anthropologists to offer transformative potential, since successfully crossing the liminal space can result in an improvement of learning or status ([Turner, 1979](#); [Van Gennep, 1960](#)). In the liminal context, learning is equated with self-development, known in the anthropological literature as the protagonist/learner's 'reincorporation' into the social structure, with a transformed sense of self and others ([Van Gennep, 1960](#)). But importantly, these views of liminality do not raise questions of its potential use and abuse in developmental terms ([Horvath and Szakolczai, 2018](#)). For example, liminality also presents dangers, in that liminal subjects may be cast adrift from social conventions and may encounter moments of precariousness, doubt and uncertainty ([Douglas, 1966](#); [Horvath and Szakolczai, 2018](#)). Scholars of organization studies have found much of value in this concept (e.g. [Bamber et al., 2017](#); [Beech, 2011](#); [Clegg et al., 2014](#); [Daskalaki et al., 2016](#); [Hay and Samra-Fredericks, 2016](#); [Ibarra and Obodaru, 2016](#); [Sturdy et al., 2006](#)), identifying in liminality a way to conceptualize the fragility and precariousness of many experiences in organizations.

Returning to the anthropological literature clarifies that liminality was understood by [Turner \(1979\)](#) and [Van Gennep \(1960\)](#) as a set of moments 'in-between', which are resolved when the liminal subject is reincorporated into the society, often with a higher status. [Söderlund and Borg \(2017\)](#) characterize this transitional perspective as 'liminality as a process'. In leadership education, this takes place in the form of learning ([Kempster et al., 2015](#)), with [Hawkins and Edwards \(2015\)](#) arguing that leadership students come to understand many ways to 'think like a leadership scholar', becoming familiar with the feelings of doubt that are implicated in leadership practice itself ([Weick, 2001](#)). This transitional/transformative nature, [Turner](#) argues (1979), is what gives liminality its power; he argues that no subject or society could exist in a permanent state of liminality, without any clear social structure or any way of understanding the world and relationships in it. [Bamber et al. \(2017\)](#) have developed this work by looking at the experience of academics. They argue that where no transformation occurs, occupants become stuck in a kind of 'limbo'. They suggest that in

academia, structural and social barriers prevent teaching-only staff from advancing to a higher social status (being ‘reincorporated’ with an elevated identity) through promotion, or through other indicators of academic ‘esteem’ such as publications. Such discussions lead scholars to identify liminality as a space, a cultural realm (Turner, 1979) through which participants may pass, or get stuck (Daskalaki et al., 2016; Shortt, 2015; Söderlund and Bourg, 2017).

An issue we highlight in the existing literature uses liminality mainly to explore the experiences of the liminal subject – identified by Campbell (2008) as the hero or protagonist, passing through liminal space *en route*, one hopes, to some form of learning. Apart from the liminal subject or liminar, liminal spaces in organization studies appear devoid of other characters. Reviewing the anthropological origins of liminality in the study of tribal ritual (Douglas, 1966; Turner, 1979) illustrates that the liminar is not alone: other characters are understood to be present as liminality’s permanent occupants. One such occupant is the ‘trickster’, a folkloric archetype who helps build and unravel the world that the liminal subject steps into, often by disobeying or transforming expectations and conventions (Campbell, 2008; Hyde, 2008). The trickster can even be the cause of the uncertainty and doubt that so characterizes liminal spaces (Campbell, 2008). Hawkins and Edwards (2015) first identify the leadership educator/facilitator as a trickster, but the modes of ‘trickster-ish’ behaviour attributed to educators and the role of ‘being trickster-ish’ in leadership education are left undeveloped. This leads to our research question – what can leadership educators learn from the trickster archetype, and how do ‘trickster-ish’ practices contribute (or not) to the development of learning experiences? We will now go on to look more closely at the narrative around the trickster tale and relate this to tensions and dilemmas in facilitating leadership learning.

The trickster tale

In this section, we explain how the trickster, an archetype often associated with liminality, helps us situate the leadership educator/facilitator more clearly in the liminal space that characterizes leadership learning experiences. We respond to calls for examinations of culture to provide critical commentary on leadership (e.g. Edwards, 2015; Evans and Sinclair, 2015; Sveiby, 2011; Warner and Grint, 2006) by drawing attention to the trickster archetype as a complex and pervading myth found in a number of cultures around the world (Babcock-Abrahams, 1975; Windling, 2007). The trickster has been described as an unpredictable and irrepressible figure (Datlow and Windling, 2007), a comic holotrope (Vizenor, 1990), a transitional character and culture-bringer (Lowie, 1909; Ricketts, 1966). It is not however a singular character but one set in a dualistic relationship with the protagonist or ‘culture hero’ (Ballinger, 1991; Datlow and Windling, 2007; Horvath and Szokolczai, 2018; Lock, 2002; Lowie, 1909; Radin, 1972; Ricketts, 1966), in which the trickster’s antics bring the protagonist new knowledge about the world. Here is where we see an analogy between the trickster/protagonist and the learner/educator relationship.

Using trickster tales in the classroom is not new. Verbos et al. (2011), for example, have highlighted the trickster tale of the ‘Coyote’ which they suggest can be used in the classroom to explore differing notions of time that challenge the Western norms of temporality. We go further however by placing ourselves within a trickster archetype, which we believe we are performatively pushed towards. Hence, we are not using one example of a trickster as Verbos and colleagues do but use the literature to situate ourselves more visibly (through introspection and then conversation) with our performative role. Indeed, Verbos and colleagues go on to warn of the offence it may cause to use specific ‘tricksters’. Instead, they recommend using ‘trickster-like’ stories to help students. We take note of this and use a generalized view of the trickster to enable us to explore our own stories.

When reviewing the trickster literature, the first thing we noticed was the dualistic relationship the trickster has as both a teacher of cultural skills and customs, but also a prankster, being both deceitful and cunning and hence combining the heroic with buffoonery (Ricketts, 1966), a paradox, a ‘criminal’ culture hero (Babcock-Abrahams, 1975). The trickster’s ‘...beneficence ...results from the breaking of rules and the violating of taboos...and must remain marginal and peripheral, forever betwixt and between’ (Babcock-Abrahams, 1975, p. 148). The trickster is therefore typified as a destructive influence and culture hero in one (Datlow and Windling, 2007); a breaker and (re) maker of worlds and world views.

Hyde (2008) describes the trickster as the ‘lord of the in-between’, of liminal spaces and transitions. Babcock-Abrahams draws on Turner (1967) to suggest that the trickster is a representation of the ‘peculiar unity’ of the liminal – ‘that which is neither this nor that, and yet is both’ (Babcock-Abrahams, 1975, p. 161, citing Turner, 1967, p. 98). Examples of trickster tales are numerous, but some popular ones are the Coyote (see Verbos et al., 2011) from Native American storytelling and the folktale of the Raven from the Pacific Northwest (see McDermott, 1993)¹. Others include Loki from Nordic mythology and the Leprechaun from Irish mythology (Horvath and Szakolczai, 2018). In most cultures and stories, a trickster archetype can be found, for example one might identify Bart Simpson as a more modern interpretation of a trickster.

The trickster’s tale is an account of continual liminality, where the trickster is (from the perspective of the protagonist) a permanent occupant of the liminal space. Tricksters can be instigators and ‘tactical users’ of liminality in order to confer new understandings or world views onto liminal subjects – as indicated by Sturdy et al. (2006) discussion of the tactical use of liminal space by management consultants hosting business dinners. In contrast, the subjects of liminality or liminars (Turner, 1979) ‘pass through’ on their way to reincorporation into a social structure (Van Genneep, 1960) or, here, ‘development’ or learning. Similarly, stories of the trickster have also been framed as models of socialization which incorporate the development of a reversible logic and the acquisition of the psychosocial skills of self-management (Abrams and Sutton-Smith, 1977), a tale of self-development (Babcock-Abrahams, 1975). Here, the link with aspirations of leadership learning and development regarding the development of the self (e.g. Goffee and Jones, 2000) can be seen.

The literature emphasizes the importance of liminal spaces as moments where students achieve learning in the form of new perspectives and world views (e.g. Land et al., 2014). We believe our reflections on our own experiences through the lens of trickster tales can offer a more nuanced and disquieted understanding of liminality by illuminating ethical and practical implications for facilitators.

Whilst the trickster is often a shape-shifter, trickster tales do not focus on the trickster’s development, but significantly, on the development of others. We can draw on examples of ‘trickster’ behaviour therefore in leadership learning facilitation, where facilitators act as ‘destroyers’ by tearing down old assumptions and ‘culture givers’ by establishing new ‘webs of significance’ (Geertz, 1973, p. 5) in the pursuit of the heroic ideal (Schweiger et al., 2020) of the corporate acolyte (Hopfl, 1992). Much accepted practice in leadership education, such as simulation, role-play and so on, has a trickster-ish quality designed to manipulate learners by immersing them in tests and challenges (meant to ‘test’ responses to crises) that reveal flaws in previously held convictions about leadership. Such practice is designed to (hopefully) move learners forward but can leave them feeling ‘stuck’ or doubtful (Hawkins and Edwards, 2015; Kempster et al., 2015) in the tension between new and old understandings. In our reflective conversations, we were inspired by the trickster literature to explore moments when we felt trickster-ish about facilitating leadership learning. Our reflections lead us to question the problematic characteristics embedded in facilitation,

in the hope of generating honest conversations about the power relations and manipulation inscribed in seeing leadership learning as ‘transformative’ and facilitators as deliverers of new understanding.

Methodology

Our analytical approach is mainly reflective in nature. We started with a more reflexive intent whereby we wanted to question what is taken for granted and examine what is privileged and marginalized (Allen et al., 2019) within the leadership learning and education setting. In the first instance, we believe we have contributed in challenging taken-for-granted views on leadership development facilitation. But, we also feel that we have not necessarily achieved the deeper double-loop learning so indicative of reflexivity (Cunliffe, 2003, 2009) and hence are reticent to claim such an approach.

In addition, we wanted to use experimental writing linked to readings of mythology (similar to Schedlitzki et al., 2015) as we felt that this was the one way we could get close to a trickster archetype. We sought however to also draw out our own authorial identity in relation to the research subject – hence taking ourselves as a source of data (Duncan, 2004) by attempting to ‘...gaze back into [our] own multi-storied life space’ (Boje et al., 1999, p. 349). We therefore collected some informal written accounts of our reflections on practice linked to reading and discussion of trickster stories. Some reflections (written in note form) come from one of the authors’ experiences as a facilitator both within a private training organization (delivering executive education) and then in a university setting (delivering undergraduate, postgraduate and post-experience modules). Other reflections come from taped and transcribed conversations between two of the authors based on teaching a third-year undergraduate ‘Organizational Leadership’ module. This access to reflective data forms a facilitator standpoint focussed on our approach along these lines; whilst we are aware that data from students would help provide further depth, we felt that the data we had were enough to develop initial contributions to this area of research. We have highlighted in our further research section that we would look to conduct further research by incorporating the student perspective on trickster-ish behaviour too.

Similar to Hibbert et al. (2017), our work is informed by understandings of the self as a site through which scholarly awareness is brought into being (Spry, 2001) and through which we witness – and voice – ‘transgressive acts’ (Park-Fuller, 2000, p. 26) which might be thought of as trickster-ish. In giving our reflective accounts, we hoped to bring ourselves more clearly into the research field but also to recast ourselves in trickster tales, using our experiences to construct a narrative (e.g. Daskalaki, 2012; Daskalaki et al., 2016; Humphreys, 2005). We connect these narratives to a reading of the trickster literature, echoing other accounts linked to fiction or drama (e.g. Czarniawska, 1997; Hatch, 1996) or books, colleagues or training programmes (Gabriel, 2002). Hence, like other scholars noted here, we are hoping to contribute to knowledge through a ‘...provocative weave of story and theory’ (Spry, 2001, p. 713).

Our method began with a series of detailed reflective discussions about our involvement with leadership learning exercises (some reflections back on practice were written as diary accounts), which amounts to over 35 years of combined experience. Furthermore, we have known each other for several years now and have an established practice of sharing reflections and engaging in constructive dialogue with one another about or teaching and learning experiences. We therefore explored our experiences through a dialogue with prominent literature and with the mythology of the trickster and pursued this through several cycles of conversation and interpretation (Hibbert et al., 2019). We corroborated/shared our experiences with one another to elucidate common themes. These included instances where learners drew attention to our trickster-ish endeavours, such as when

students and delegates talked about the unfairness of aspects of learning. We then related these to ‘second-order’ concepts (e.g. Van Maanen, 1979) by comparing these experiences to the trickster narratives, we especially noted ‘culture-giving’ incidents, or incidents where students were seemingly ‘led astray’ or set challenges by us as trickster facilitators. With this methodology, we aimed to show how a trickster lens can build theory, illuminating the contents of liminal spaces to problematize leadership development facilitation.

Findings: Being trickster-ish

In our reflective discussions, we explored how both experiential learning and critical leadership studies draw on the transformative potential of liminal spaces – suspending the student’s previous relationships, immersing them in a new ‘uncertain context’ – before reincorporating them back into the social structure of the classroom with altered understandings. However, these liminal experiences also provoke encounters with doubt. For example, Hawkins and Edwards (2015) highlight the importance of doubt in leadership learning, given that doubt and uncertainty are central to leadership through the practice of navigating towards, and enacting, an uncertain future (Weick, 2001). This experience is noted by other scholars to reflect those of leadership development facilitators, who identify a sense of ‘...doubt... angst and struggle’ within student/delegate groups, centralized around issues of identity (Nicholson and Carroll, 2013, p. 1240). These observations pushed us to reflect on three specific aspects of how we as ‘tricksters’ were interacting with students that were evident in our reflective conversations. These are ‘a hands-off teaching style’, ‘seemingly setting students up to fail’, and ‘sudden changes in plans or expectations’.

A hands-off teaching style

From our experience, deliberately non-interventionist approaches are fairly common in leadership development exercises which then require learners to navigate through structured uncertainty (Hawkins and Edwards, 2015). We discovered in our conversations and personal reflections that all the authors had years of experience in developing exercises based on this method, with a learning aim of developing independent and proactive decision-making in groups. These types of activity require learners to interpret and negotiate their own response to the task and then to reflect on how they had managed conflict and delegated responsibility amongst the group. Commonly, all necessary guidance is therefore provided upfront in a detailed information pack. But one personal reflection revealed a common response from delegates was to seek approval from the facilitator regarding certain actions and decisions – resulting in the reply, ‘all you need is in the project brief’. Often, the author of this reflection (Gareth) described how this non-interventionist response continued throughout the programme (whether it took place over 1 day or 5 days), forming an integral part of the learning intervention, which focussed on developing self-reliance and problem-solving. Gareth also described how he was encouraged to hold back and search for the ‘killer question’ (Nicholson and Carroll, 2013, p. 1234). He goes on to describe wrestling with differing styles of facilitation in reviewing group exercises.

I tended to use a non-interventionist stance, whereby I would ask open questions – How did you do this? What was the purpose? Etc. whereas Nick [a pseudonym] would tend to use maybe a more coaching style whereby he would be more of a coach, giving advice and so on, this grated with me a little as I wanted to be totally objective, distant, as I had been trained in my previous role, not give advice, let them learn for themselves. It did make me think that I was maybe being too distant especially with international students

who just looked completely confused – why is this guy not answering my questions or not giving us the answers? – I guess they were seeing me as tricking them – well there it is, [I'm] a trickster...' (Excerpt from a reflective note from one of the authors – Gareth).

As is evident from the script, at times, this can lead to resentment by delegates and students who were frustrated in not being given the 'answers'. A similar perspective comes from one of our recorded conversations. Throughout the process of teaching the module, Gareth and Neil were in the privileged and somewhat detached position of knowing the narrative arc of the module and are able to an extent control what students see as right/wrong, acceptable/unacceptable and true/false.

'A1: ...we held back, we held back information, the point is that we held information back so when students were, you know, talking about transformational leadership, we just talked about transformational leadership, we didn't then say...did you know that actually there's this paper by....' (Excerpt from a reflective conversation between Gareth and Neil –A1 refers to Gareth).

The hierarchical power distance expressed by both [Nicholson and Carroll \(2013\)](#) and [Sinclair \(2009\)](#) places us as educators 'in charge' of this narrative and also encourages the students to interpret a perspective (e.g. transformational leadership) as 'the facts'. Then, later on, when educators like us introduce alternative ways of understanding leadership (e.g. the fact that leadership is a pluralist subject) feels for some students like a 'trick', a betrayal. Our trickster role became clear to us as we questioned whether we were taking advantage of, firstly, the trust that students place in us as reliable narrators and disseminators of 'truth' and, secondly, our position of power derived from and performed through Anglo-Saxon norms which condition understanding about how education is 'done' to the student by expert educators ([Nicholson and Carroll, 2013](#)) and providers of knowledge in the same vein as the 'culture-giving' character of many trickster stories. In addition, we realized uncomfortably that we noted moments where students did not pick up on the hints that we place throughout the module. We also noted that this is qualitative 'proof' that the second part of the module will indeed represent a liminal passage, which could result in a significant learning experience. Like tricksters, we became the (in)direct cause of potential emotional upheaval, anxiety, confusion, frustration and anger.

Whilst the rationale for these responses was to enable a process of self-learning, these experiences led us in further reflective conversations to question our own assumptions about how to support and facilitate experiential learning and the introduction of critical leadership studies into the module, similar to [Iszatt-White et al. \(2017\)](#). Whilst some scholars focus on the undoing of identities in leadership learning (e.g. [Nicholson and Carroll, 2013](#)), our work echoes scholars who note that the facilitator plays an important role in helping students to cross-liminal divides ([Hawkins and Edwards, 2015](#); [Land et al., 2014](#)). Using a trickster lens therefore suggest that the role of the facilitator is challenging because it requires educators to recognize the difference between an 'unhelpful' moment of doubt and the one which offers potential for independent learning and development. This is similar to the 'educator paradox' identified by [Iszatt-White et al. \(2017\)](#), as well as highlighted earlier in this article, but provides a deeper sense of the context of the paradox in action.

Setting students up to fail

Our second observation on being trickster-ish addresses how participants and students sometimes perceived themselves as seemingly being 'set up to fail'. Further conversation between the authors

about our reflections suggested that challenges and projects given to programme participants in this context were ‘achievable’ but difficult and complex. Furthermore, the executive programmes being reflected on by one of the authors (Gareth) were informed by an incremental learning rationale, where the complexity of projects increased as the programmes proceed. We reflected also that undergraduate management programmes can similarly develop in complexity and challenge as a student progresses through the years of their degree. This increasing complexity, in conjunction with the attempts to encourage students to think and study with some degree of independence, as noted, above, risks developing an even greater frustration on the part of participants and students.

‘A3: ...I remember [the introduction of more complex ideas] caused confusion didn’t it, with some students where they would say well hold on a minute you’re telling us one thing, but now you’re telling us that it is a load of rubbish or ... that you can be critical of it...’ (Excerpt from a recorded reflective conversation between Gareth and Neil, A3 refers to Neil).

Here, we note that over the course of a programme, leadership facilitators often shift from being an advocate of one leadership model towards advocating another, evoking the way a trickster might morph. We reflected that it was useful that students understand and articulate ‘popular’ or mainstream perspectives of leadership: they give context to the development of leadership knowledge and reflect most clearly the likely representations of leadership in students’ own experiences, popular culture and the media. However, our experiences led to a reflection that students conflate ‘understanding’ with ‘truth’, which prevents them from developing more nuanced understandings later in the module. This contributes to interpretations of our ‘trickster-ish’ behaviour as ‘shifty’, misleading and manipulative, similar to how the trickster misleads the protagonist. The roles of the trickster/facilitator and learner/protagonist are cast through a multitude of factors, including the power relations conditioning the classroom dyad, as noted above.

Sudden changes in plans or expectations

A central part of our reflections and conversations was also the changes in timings in experiential projects to stretch participants.

“...there is an element of tricking participants, of telling them one thing and then changing it at the last minute – you know, giving them a surprise. But this is to enable learning for themselves, the process of working out issues for themselves but also stretching them at the same time. By stretch, I am thinking of how we were trying to push participants outside of their comfort zone, the usual thing on these sorts of leadership programmes. One more specific example comes to mind, whereby we would hand out project details to the person we ‘appointed’ as a leader slightly early, say 30 minutes before the start time, to surprise them, give them a shock.” (Excerpt from the reflective notes from Gareth).

The idea of a surprise on leadership development programmes recalls what [Carroll and Nicholson \(2014\)](#) call ‘throwing a shock’ or what [Napier et al. \(2009\)](#) describe as an ‘aha moment’. This calls for a ‘leap of faith’ by participants; however, these ‘shocks’ are defined and attempted to be controlled by facilitators ([Carroll and Nicholson, 2014](#)). The role of the facilitator or educator is not simply to provide the shock but to implement this in ways that enable students to benefit from its transformative potential. As we have noted above, the trickster is often the ‘surprise-bringer’ in mythology – a character who seeks to control by causing chaos and uncertainty, before bringing about a change. In the case of leadership education, often in the form of perspective transformation

(Mezirow, 1978) or ‘double-loop’ learning, students learn to question and alter their own assumptions about leadership theory and/or practice (Argyris, 2002). Drawing attention to the facilitator’s trickster-like behaviour enables us to question, as do Carroll and Nicholson (2014), the level of control traditionally expected of facilitators and the expectation of ‘transformation’. Whereas Carroll and Nicholson position this as part of their investigation into resistance and struggle in leadership development, our point examines the facilitator role in relation to the inherent tension and dilemmas that these acts may present in the process of leadership learning. As Ballinger (1991, p. 21) explains, the trickster archetype embodies multiplicity and paradox: perhaps, this is especially significant where facilitators must enable ‘many ways to think like a leadership scholar’ (Hawkins and Edwards, 2015, p. 25) or, at least, negotiate between a ‘sage on the stage’ identity and that of a ‘guide on the side’ (Iszatt-White et al., 2017).

We have found that within one of our reflective conversations, a deeper sense of how this process comes about within undergraduate programmes is seen. For example, we discuss how an undergraduate module, taught by one of us, presents the traditional leadership canon in the first semester, addressing trait theory and other perspectives that focus on the ‘leader’ as individual. In so doing, we noted that this module encouraged students to internalize this way of thinking about leadership to a point where it becomes taken for granted, and a part of their own identity – particularly because, as Hawkins and Edwards (2015) note, these theories often fit with students’ teleological assumptions about leadership. In the second semester, we seek to undo this work, by considering critical notions of leadership and drawing on the power, privilege and inequalities embedded in the previously discussed leadership theories. We challenge students to look at the theories, approaches and perspectives in a different light. Our reflections, considered iteratively with the literature, reveal that we were asking them to challenge and (re)negotiate their own identity similar to the instances of identity undoing found by Nicholson and Carroll (2013) and Iszatt-White et al (2017).

‘A3: its difficult...it does upset that sense of certainty and normality... students want to leave with kind of concrete knowledge, initially I think, they want to leave with that, especially with leadership, there’s something about leadership that they want the skills, they want to know the ideal type, they want to know where things have gone wrong before so that they can [improve]... they want the security of having, of someone to tell them this is the best way to be, and then...we’ve set it up in that Trickster-ish way which set it up at the start as doing that, as being that narrative...We’re not going in and from the start going, we are going to disrupt how you think about yourself, you are going to leave here not knowing what sort of leadership style is appropriate... we didn’t do that...’ (Excerpt from a reflective conversation between Gareth and Neil, A3 refers to Neil).

Through further reflection and conversation on how we progressed through this module, we recognized that we had created a liminal learning experience, in which we ask students to leave behind the bonds of their previous understandings and to trust us, the facilitators, as they enter into an increasingly uncertain, complex learning environment where self- as well as leadership knowledge is called into question. The aim of the module was for students to achieve reincorporation once they emerge from liminality, with new understanding about the ‘many ways to think like’ (and with a new sense of themselves as) ‘a leadership scholar’ (Hawkins and Edwards, 2015, p. 25). Our reflections led to new perspectives on how to develop learning environments that are more supportive of students undergoing similar ‘cultural shifts’ or surprises.

Discussion

From our findings, we identify the important role of tricksters in the liminal learning experience through specific leadership education tools such as ‘throwing a shock’, ‘hands-off teaching approaches’ and ‘seemingly setting students up to fail’. Discomfortingly, we might call these ‘trickster tactics’ as all three of these aspects generate liminal experiences and facilitate the suspension of social conventions and bring about a space of uncertainty, which carries with it the potential for new understandings and ways of relating to the self and others (Turner, 1979; Van Gennepe, 1960). However, we point to the increased risk, for facilitators, of being cast as a ‘trickster’ from performative pressures to enable the development of the hero figure (O’Reilly et al., 2015; Schweiger et al., 2020) or corporate acolyte (Hopfl, 1992). Understanding the trickster archetype embedded in the facilitator role surfaces these tensions and dilemmas. Our main contribution therefore is to show how, as facilitators, we can use the trickster archetype, a role rich in paradox and multiplicity, to think more critically, reflectively and reflexively about our role and practices as educators, in particular, the ethical and power-related issues.

Consequently, we provide a paradigm in which facilitators can ensure that they enable an equal balance between prankster and culture-giver, which epitomizes the trickster archetype. Not having this balance would provide for potentially problematic interaction with learners (solely prankster) or superficial engagement (solely culture-giver), whereby participants are given prescriptive tools that do not challenge at a liminal level. We also contribute here to the debate on the shadowy nature of leadership development and its facilitation (Nicholson and Carroll, 2013) whereby our reflections on being ‘trickster-ish’ caution educators to think about their motives in designing content and means of delivery. For example, we continue to feel uncomfortable about the ethics of ‘tricking’ participants and students, even where this enables an important learning outcome and is recognized by students as an exciting, but provocative, component of such courses. We might also wonder whether it is ethical for training organizations and universities to put facilitators in the role whereby they can be seen as ‘tricksters’ or challenge the performative pressure that is created by a crisis-constructing context (see O’Reilly et al., 2015).

An awareness of trickster tales also brings to the fore the power relations in leadership development programmes identified as ‘technologies of power’ (Nicholson and Carroll, 2013, p. 1227) encoded with assumptions about ‘who learns’ and ‘who knows’ that cast both student and educator in protagonist/trickster roles. Recognizing the culture-giving aspect of the trickster highlights more clearly the risk of the leadership development facilitator privileging their own research areas and paradigms, shaping the world views of learners. We are contributing here to calls that more focus must be paid to the educator’s role in the student–educator relationship (Iszatt-White et al., 2017).

Our focus on facilitation through a trickster lens also adds to theory and knowledge in a further three ways. Firstly, we have found that our power relationships cast us, the educator, as the ‘expert’ or ‘truth-teller’, and as such the student and/or delegate as protagonist or hero of the learning experience. We develop the findings of Iszatt-White et al (2017), by suggesting that this tension or ‘educator paradox’, as defined by Iszatt-White and colleagues, makes students vulnerable to the machinations of trickster–educators, and potentially threatening their liminal passage. Perhaps, ‘trickster tactics’ such as throwing a shock, or a hands-off teaching style, are instances where pedagogic power relations are easily surfaced because, if not aided carefully, students can become stuck in an ‘in-between’ state. This state is more in common with Bamber et al. (2017, p. 1531) notion of ‘occupational limbo’ than with anthropological definitions of liminality and its inevitable closure through learning. However, for educators who are engaged in a reflective/reflexive pedagogic practice, these tactics emerge also as opportunities to reflect on our experiences of being

perceived as ‘experts’ or ‘permanent hosts’ of liminal space, and on how to better facilitate students’ liminal transitions. Secondly, in our experience, this presents difficulties in teaching and developing leadership, related to the differences between students’ teleological assumptions about leadership (usually most closely linked to trait/charismatic perspectives) and more postmodern notions of leadership. Covering multiple perspectives is a necessary part of teaching leadership, but can result in the learner feeling confused or ‘led astray’, and therefore recasts the educator in the role of a trickster. In some ways then, the position of educator as trickster is configured by the polyphonous nature of the discipline. And, lastly, the liminality of the learning experience positions the student as the traveller through liminality (or following [Campbell \(2008\)](#) mythological archetypes, the ‘hero’ or ‘protagonist’) and casts the educator as trickster or ‘culture-giver’. Whilst the subjects (here, leadership learners) are passengers through liminality and tricksters (educators and facilitators in this case) are permanent occupants. As such, they deserve academic attention to extend awareness of how liminality is experienced and negotiated in diverse ways – and specifically, beyond the focus to date on the experience of the liminar.

Finally, our trickster lens also calls attention to the romanticization of leadership development facilitation ([Smolović Jones et al., 2014](#)), similar to the romanticization of leadership generally (see [Collinson et al., 2018](#), for a recent review). We suggest that romanticized notions of the facilitator role could hide more trickster-ish, ‘ugly’ ([Edwards et al., 2019](#)), uncomfortable and, in the extreme, unethical practices. Hence, drawing out the trickster in our explorations enables us to provide an built-in ruptural critique ([Collinson et al., 2018](#)) of leadership development – akin to how that a famous trickster – the court jester – might challenge the authority of a monarch. Our reflections indicate that as leadership learning facilitators and researchers of liminality in learning, we risk romanticizing the ‘culture giving’ elements of facilitation within liminality and the idea of the culture-giver as the ‘host’ of liminal spaces ([Sturdy et al., 2006](#)) at the cost of recognizing its ‘trickster’ elements. An appreciation of trickster tales calls this romanticism into question and reveals more clearly the encoded behaviours, assumptions and power imbalances that shape learning experiences and outcomes.

Conclusions, limitations and further research

We conclude that leadership learning facilitation can be performatively seen as intricate interplay of representation of the prankster and culture hero, ultimately represented by the myth of the trickster. To gain a deeper interpretation of the facilitator role, we have critically explored this interplay from the perspective of a trickster narrative. From this investigation, we conclude that the trickster/liminal subject (‘protagonist’) roles are invoked through the relational positioning of these identities in an ‘identity workspace’ where rites of passage are a key facilitator of identity work and learning ([Petriglieri and Petriglieri, 2010](#)) and are linked to crises and the development of the heroic.

This opens up a rich series of avenues worthy of exploration. For example, we would suggest exploring other characters or archetypes that may inhabit liminal worlds and how they might be implicated in the transformation (or not) of learners. Here, we would openly invite others to share similar stories with us and work towards a wider and deeper exploration of this intriguing but complex phenomenon. For example, by exploring a wider set of stories, we can engage more clearly with ethical issues that might arise in these relationships. We can also explore any differences that there might be between what is generally termed ‘leadership development’ (largely involving experienced managers working on and in their leadership identities through differing activities and contexts) and ‘leadership education’ (which generally involves more classroom-based activities for undergraduate and postgraduate students). Lastly, by collecting these stories and analysing them, we

might gain a deeper appreciation of the level of liminality and the feel of differing the liminal spaces and how they might impact the trickster-ish analogy.

We would also like to investigate the student/participant journey alongside that of the facilitator. We are aware that the voice of the participant is missing from our data, but we hope to work with those involved within programmes and interventions as well as those facilitating to enable a deeper interpretation of the journey of all stakeholders. We hope to do this exploration through the development of contextually based ‘trickster tales’ by facilitators, students/participants and other stakeholders (such as those commissioning leadership development programmes). We believe that using this form of data collection will enable a deeper look at the development/education journey of all concerned.

Furthermore, in developing this line of research, we see a need to take into account more aesthetic interpretations of the trickster in leadership learning (e.g. [Carroll and Smolović Jones, 2018](#)). The imagery and symbolism of ‘trickster tales’ may be used in conjunction with stakeholders developing their own trickster tales, as suggested above, indeed, colleagues are already using playful trickster caricatures in the form of puppets to elucidate leadership learning in management groups (see [Kempster et al., 2015](#)). We take note of these types of approaches and hope to work with them to further enhance our understanding of facilitating leadership development and education.

We also reflect back on limitations in our approach which stem from the reflective nature of our analysis. For example, we were unable to record some of our reflective discussions in real time, owing to their opportunistic nature, although we noted these in detail later, wherever possible. We also regret that we did not quite get to a reflexive engagement with the data and would look to enhance this in further research. Similarly, there are other areas of our experience that we do not have space to explore here, meaning that other areas of trickster-ish behaviour may have gone unexplored. The act of choosing which experiences to draw on here is potentially ‘trickster-ish’ in itself, since reflective accounts are always partial and incomplete. Furthermore, although we use our reflections in iteration with our use of the literature to build theory, we cannot be sure that our experiences are generalizable to other leadership educators.

To surmise therefore we have identified evidence that suggests leadership learning and development facilitation can be set within narratives employing a trickster archetype and show that doing so helps us problematize the role of the leadership educator. By disclosing this hidden narrative, we hope to help learners appreciate the liminal spaces to which they will inevitably reside in learning spaces as diverse as leadership development programmes and university lectures. We therefore encourage other facilitators to explore reflective questions like – Is it okay to manipulate students? Do students learn through the creation of doubt, being set up to fail or changing plans/expectations suddenly? Should leadership learning programmes aim to transform participants in some way? What does this say about power relations? Who is being transformed here and by whom and in whose interests? We believe that exploring our own trickster tales as facilitators will enable the answers to these questions and others to have meaning in shaping learning experiences for participants.

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Note

1. Gerald McDermott also has a series of easily accessible books on various trickster archetypes – the Monkey from India, Jabuti the Tortoise from the Amazon and Zomo the Rabbit from West Africa, among others.

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Neil Sutherland, after spending his formative years touring across the world in DIY punk bands, Neil Sutherland has now taken the not-so-obvious career progression of teaching and writing about the theory and practice of organizations. In particular, he is interested in leadership within ‘alternative’ organizations, including radically democratic social movements. Throughout his research, he draws on critical leadership studies (CLS): reconceptualizing leadership as a collective and relational socially constructed process and as something that can exist in the absence of permanent and stable leaders.