



**Report to the  
2018 Annual General Meeting  
of  
Action Learning, Action Research  
Association Inc.**

**ALARA Management Committee**

# Report Structure

**Part 1:**  
**Overview of strategic achievements**  
ALARA Strategic Plan 2015-2020

**Part 2:**  
**Presidents Report**

2a) Presidents report

2b) Australasian Vice President

2c) International Vice President

**Part 3**  
**Working Groups**

3a) Web Services

3b) Publications

3c) Membership & Marketing

**Part 4:**  
**Treasurers Report**

3d) Streams



# PART 1: OVERVIEW OF ACHIEVEMENTS

- »» Status report on ALARA  
Strategic Plan 2015-2020



# Strategic Plan 2015-2020

## ➤ **Strategic Plan, conducted during 2014, produced three key themes**

- 1) ALARA identifies one or more significant financial benefactors, who are willing to engage in strategic alliances or joint ventures to further ALARA's aims and grow its recognition and membership base within the AL / AR community

### 2017/18 Outcomes:

- ❖ Announcement about ALARA becoming a recipient of donations and bequests delay until incorporation changed
- ❖ ALARA entered into strategic agreement with GCWAL about recognition of their Innovative Change Practitioner program, with participants becoming members of ALARA
- ❖ ALARA announced the development of a Fellowship (Membership Levels) program





# Strategic Plan 2015-2020

## ➤ Strategic Plan (2)

- 2) ALARA allows organisations with Action Learning / Action Research interests to utilise ALARA's reputation to develop new ideas, new activities and potentially increase membership and the recognition of ALARA

2017/18 Outcomes:

- ❖ ALARA's Chapter in Norwich University was announced in June 2017 and further discussions are continuing with Norwich about future events by the Norwich Chapter
- ❖ ALARA conducted the 2018 World Congress at Norwich University in Vermont USA June 2018
- ❖ ALARA has commenced discussions with CARN about co-hosting a conference in 2019



# Strategic Plan 2015-2020

## ➤ Strategic Plan (3)

- 3) The Management Committee provides guidance on how an organisation might propose a strategic alliance.

2017/18 Outcomes:

- ❖ ALARA continues to support organisations with the hope of future alliances, such as the work by the International Vice-President in Ghana and other countries (see his report later) and discussions with CARN about a joint conference



# PART 2: PRESIDENTS' REPORTS

- »» This part includes the reports of the President, Colin Bradley, and International Vice President, Emmanuel Tetteh



## 2a) President's Report

### Goals for This Year

- Conduct discussions with members about changing the form of incorporation, and conduct a general meeting to obtain members' decision on changing the form of incorporation  
Members voted to change form of incorporation in April 2018 after three months consultation, and work continuing to achieve that change
- Promote ALARA / GCWAL Education Programme  
Considerable time spent on finalising the Programme, with the GCWAL Innovative Change Practitioner Programme launched in June 2018
- Reinforce Financial Stability  
A further loss this year due to a loss on the Congress, although some of the seed funds will be returned in 2018/19 – see Treasurer's report
- Grow membership  
New members are joining ALARA, but only at about the same pace as members leaving (a number of whom are reaching retirement age)





## 2b) Australasian VP's Report

No-one nominated for the Australasian Vice-President last year.

- As ALARA was preparing for the World Congress in Vermont USA, ALARA did not plan an Australasian Conference. Discussions are continuing with CARN on a joint conference in Europe in 2019, so ALARA is planning to stage a small event in early 2019, or a full conference in 2020 (which is more likely). A Co-host is now sought for either or both events
- The Brisbane group continued to hold successful Conversations throughout the year



## 2c) International VP's Report

- **The following outlines the provision of support for marketing planning, policies and processes made by Dr Emmanuel Tetteh**

Based on the approved future strategic directions for 2014 – 2020:

### **1. Ghana Action Learning, Action Research Association (GALARA):**

- I continued with the follow-up efforts on the official invitations sent to Dr Brian Jennings of Ghana Christian University College (GCUC) for strategic alliances with ALARA that led to the formation of GALARA
- With the leadership of the Steering Committee efforts, the GALARA has been fully registered as an association limited by guarantee in the Republic of Ghana, West Africa, coupled with Dr Brian Jennings serving as the GALARA Steering Committee Chair
- I was invited to Ghana for the initiation of the GALARA Inaugural Meeting. However, because of the ALARA 2018 World Congress, the GALARA Inaugural Meeting has been postponed
- To advance the GALARA Inaugural Meeting Initiation, there is an ongoing discussion with Dr Brian Jennings and Dr Augustine Tawiah, Honorable Member of Parliament of the Republic of Ghana for me to return to Ghana next year (2019) to facilitate action learning, action research workshop sessions
- Other possible local ALARA activities in Ghana under discussion include professional events, ALAR coaching, facilitator training, program endorsement, support for ALAR certification prospects, etc.





## 2c) International VP's Report

### 2. ALARA World Congress:

- I worked closely with ALARA's President and Dr Rosemarie Pelletier of Norwich University, in planning and organizing the ALARA 2018 World Congress held at Norwich University in Vermont USA, on 17 - 20 June 2018
- I worked hard to assemble about five world-renowned scholars and esteem fellows of the action research / participatory action research community who served as the ALARA 2018 World Congress Keynote Speakers
- These prominent Keynote Speakers included Dr Hilary Bradbury, Prof Jack Whitehead, Dr Mary Brydon-Miller, Dr Ernie Stringer, and H. E. Prof. Hassana Alidou, the Republic of Niger Ambassador Extraordinary and Plenipotentiary to the United States and Canada
- To promote the ALARA 2018 World Congress, I travelled to Cartagena, Colombia participated and presented a report at the 5th Action Research Network of the Americas (ARNA) Conference & 1st Global Assembly for Knowledge Democracy
- Also, by way of promoting the ALARA 2018 World Congress, I travelled at my own expense to Rethymno, Greece, participated in CARN 2017 Conference and presented a seminar and a roundtable workshop on AL/AR models for participatory data collection.



## 2c) International VP's Report

### 3. ALARA Chapter:

- Based on the approved ALARA Future Strategic Directions for 2014 – 2020 that led to the Memorandum of Understanding (MOU) for the formation of the ALARA Chapter at Norwich University, I worked closely with ALARA's President and Dr Rosemarie Pelletier of Norwich University, to further the development of the Norwich Chapter
- I initiated and promoted the interests, recruitment, and increased participation of faculty, students, and ALAR practitioners across the USA for ALARA membership and participation in ALARA-related activities
- I also initiated and advanced marketing strategies to increase faculty and students participation in ALARA Tertiary Education Community on LinkedIn
- I have also started a preliminary discussion for local ALARA Chapter and activities in Trinidad and Tobago, the West Indies
- I am continuing to work with Colin, John, and Tome on proposals for ALAR Journal classification direction .



# PART 3: WORKING GROUPS



Includes:

3a) Web Services

3b) Publications

3c) Membership and Marketing

3d) Streams



## 3a) Web Services

[www.alarassociation.org](http://www.alarassociation.org)

ALARA on Facebook, Twitter,  
LinkedIn, Google+ and YouTube

### Achievements

- New website continues to expand with new pages
- Facebook group grows – 480 members by end of June 2018
- Twitter account has 250+ followers (by June 2018)
- Google+ and YouTube accounts available
- Student LinkedIn group – Tertiary Education Community – continues to grow with a USA member's support – over 186 members
- Journal on Open Journal System allowing member access to full articles, and community access to abstracts

### Challenges

- Looking for new, interesting material to place on new site, as it will accept videos, pictures and other attention-grabbing items
- Social media sites will benefit from greater involvement by members and broader AL / AR community



## 3b) Publications

**World Congress Proceedings 2015**  
- Released in August 2017

### Journals

- Vol 23 No 1 and 2 published
- Vol 24 No 1 in preparation
- New Managing Editor required
- Management Committee working to create an International Editorial Board

### EBSCO and Informit

- Journals available, with access to Informit via website

### Editorial Panels

- 62 members, but more volunteers welcomed

### Print-on-Demand through Sydney Uni Press

- Journals, Monographs and World Congress Proceedings

### Fortnightly Emails

- Sent 24 times, with 10+ items of news from ALARA and other organisations

### Monographs

- Seeking submissions
- New Editor required

[editor@alarassociation.org](mailto:editor@alarassociation.org)

<http://www.alarassociation.org/publications>





## 3b) Publications

- Additional activities undertaken by Tomé Mapotse as Publications Coordinator
  - In the absence of a volunteer, Colin Bradley continued in the role of Editor for ALARj. Two issues of the Journal have been published in the ALARA financial year (with another issue of the Journal in preparation).
  - The Management Committee are busy finalizing the appointment of an ALARj editor.
  - Discussions about rebranding the existing journal continue. The focus of these discussions is on strengthening the existing journal to enhance the existing practitioner focus and strengthen it's academic profile.
  - Two people have agreed to join an International Editorial Board, with others being approached.
  - The sub-committee reviewing the Journal is keen to know the views of ALARA members about what they want in regards to a rebranded Journal.

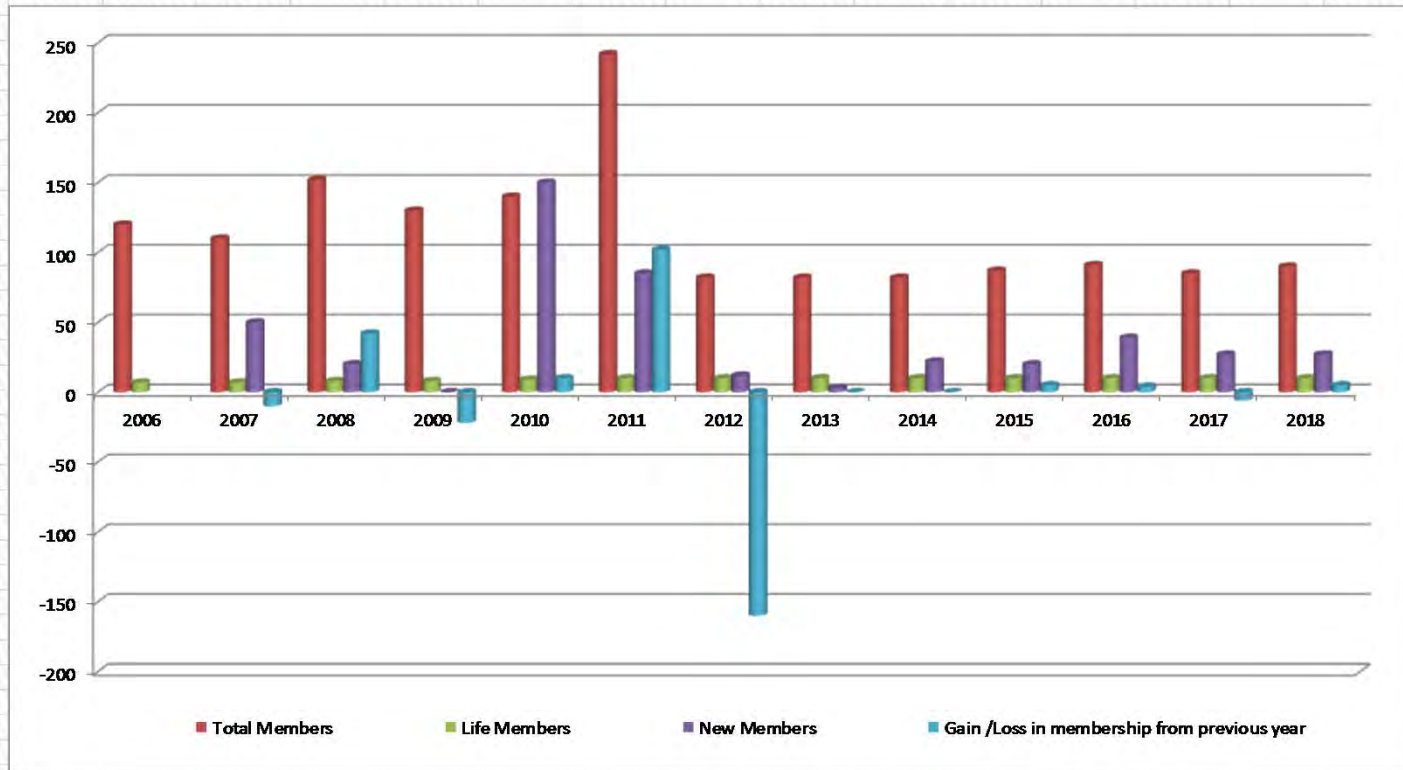




# 3c) Membership and Marketing

**ALARA Membership**

Year	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Total Members	120	110	152	130	140	242	82	82	82	87	91	85	90
Life Members	7	7	8	8	9	10	10	10	10	10	10	10	10
New Members		50	20	0	150	85	12	3	22	20	39	27	27
Gain /Loss in membership from previous year		-10	42	-22	10	102	-160	0	0	5	4	-6	5



**ALARA Membership Income**

Year	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Income	10,181	9,304	8,945	8,812	7,278	12,035	10,920	10,451	24,510	13,399	9,134	7,738	11,424	8,177	7,049	7,425

Note: See Treasurer's Report about Membership Income



## 3d) Streams

- The portfolio of the streams coordinator is left vacant for now as Tomé Mapotse has accepted a new office of Publication Co-ordinator.
- Streams Co-ordinator, which used to be managed by Tomé, was focusing on those interested in an Education network to contact him – but only a small number responded.
- Tome has tried to further develop a network in South Africa/Africa and invite others to join, but the response was also not impressive. AR/AL practitioners in Ghana seem to be moving in the right direction (see the report by the International Vice-President).
- There is also a clear need for networking amongst those doing their theses in Action Research, and the ALARA Tertiary Education Community group in Linked-In is one avenue to develop that network through the new Streams Coordinator.



# PART 4: Treasurer's Report

- 4a) Statement of income and expenditure
- 4b) Balance sheet as at 31 March 2018
- 4c) Balance sheet history 2008 to 2018
- 4d) Balance sheet history, Income & Expenditure comparison
- 4e) Balance sheet history, Income and Expenditure totals



## Treasurer's Report

### Statement of Income and Expenditure Year ending 31 March 2018

Note that future income \$6,915.50 has been placed into the 2019 FY according to the auditor, so membership income was actually \$7,424.79

The sponsorship money is seed funding for the 2018 World Congress.

The resulting notional deficit is therefore \$9,584.68

	2017	2018
<b>Income</b>		
Conferences* net income	\$1,164.93	\$0.00
World Congress	-480.30	0.00
Interest	890.69	966.99
Membership Fees	7,048.91	509.29
Local events	326.70	0.00
Other	248.08	1,701.01
<b>Total</b>	<b>9,199.01</b>	<b>2,547.29</b>
<b>Expenditure</b>		
ALAR Journal	1,310.77	0.00
Administration	10,218.98	14,684.82
Email/internet account	397.98	625.22
Audit Fees	960.00	990.00
Bank and PayPal fees	183.51	217.17
Equipment	0.00	0.00
Web design / development	5,575.00	250.00
Insurance	1,768.65	1,504.53
Sponsorship	1,130.67	13,464.62
Printing, postage, stationary	135.45	281.15
PO Box / mail forward / courier	112.73	151.08
Registration / licences	51.70	53.50
Advertising	0.00	0.00
2016 Conference loss	7,721.03	0.00
Group Spaces	242.88	0.00
Web maintenance	200.00	290.00
<b>Total</b>	<b>30,009.35</b>	<b>32,512.09</b>
<b>Net Deficit / Surplus</b>	<b>-20,810.34</b>	<b>-29,964.80</b>





# Treasurer's Report

## Balance Sheet

### as at 31 March 2018

	2017	2018
<b>ASSETS</b>		
<b>Current Assets</b>		
Cash at Bank	\$5,214.17	\$2,388.26
Term Deposit	40,535.76	20,190.72
Congress bank account	19.40	19.50
Venue deposits/seed funds	0.00	0.00
GST and BAS Refundable	67.11	171.55
<b>Total Current</b>	45,836.44	23,547.09
<b>Non Current Assets</b>		
Office Equipment	0.00	0.00
less Accum Depreciation	0.00	0.00
Total non-current	0.00	0.00
<b>Total Assets</b>	45,836.44	23,547.09
<b>LIABILITIES</b>		
Trade Creditors	1,499.97	2,047.62
GST Payable	0.00	74.17
Congress Sth Af provision	11,785.43	11,785.43
BAS payable	21.87	160.00
Prepayments-M'ship, conf	0.00	6,915.50
<b>Total Liabilities</b>	13,307.27	20,982.72
<b>Net Assets</b>	32,529.17	2,564.37
<b>Members funds</b>		
Opening Accum Funds	53,339.51	32,529.17
Add Deficit / Surplus	20,810.34	29,964.80
<b>TOTAL MEMBERS FUNDS</b>	32,529.17	2,564.37



# Treasurer's Report

## Balance sheet history

### 2008 to 2018

ALARA	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Memberships	12,035	10,920	10,451	24,510	13,399	9,134	7,738	11,424	8,177	7,048	7,424
Conferences and seminars	2,126	500	3,893	5,637	14,736	9,243	13,645	-771	12,346	-153	0
Other income	2,867	2,485	1,793	1,257	2,656	2,287	2,007	2,848	2,466	2,304	2,668
<b>TOTAL INCOME</b>	<b>17,028</b>	<b>13,905</b>	<b>16,137</b>	<b>31,404</b>	<b>30,791</b>	<b>20,664</b>	<b>23,390</b>	<b>13,501</b>	<b>22,989</b>	<b>9,199</b>	<b>10,092</b>
Journal expenses	6,997	5,000	4,918	6,889	5,465	2,367	1,529	2,261	1,456	1,311	0
Committee expenses	1,519	2,500	1,445	1,612	246	1,494	281	0	0	0	0
Admin expenses	10,483	11,745	12,306	15,363	14,367	11,222	14,574	16,717	16,770	14,071	14,684
Other expenses	58	0	0	0	0	108	442	499	0	8,852	17,288
Web expenses	4,852	5,000	2,498	2,235	1,715	884	252	275	4,890	5,775	540
<b>TOTAL EXPENSES</b>	<b>23,909</b>	<b>24,245</b>	<b>21,167</b>	<b>26,099</b>	<b>21,793</b>	<b>16,075</b>	<b>17,078</b>	<b>19,752</b>	<b>23,116</b>	<b>30,009</b>	<b>32,512</b>
<b>NET INCOME</b>	<b>-6,881</b>	<b>-10,340</b>	<b>-5,030</b>	<b>5,305</b>	<b>8,998</b>	<b>4,589</b>	<b>6,312</b>	<b>-6,251</b>	<b>-127</b>	<b>-20,810</b>	<b>-22,420</b>



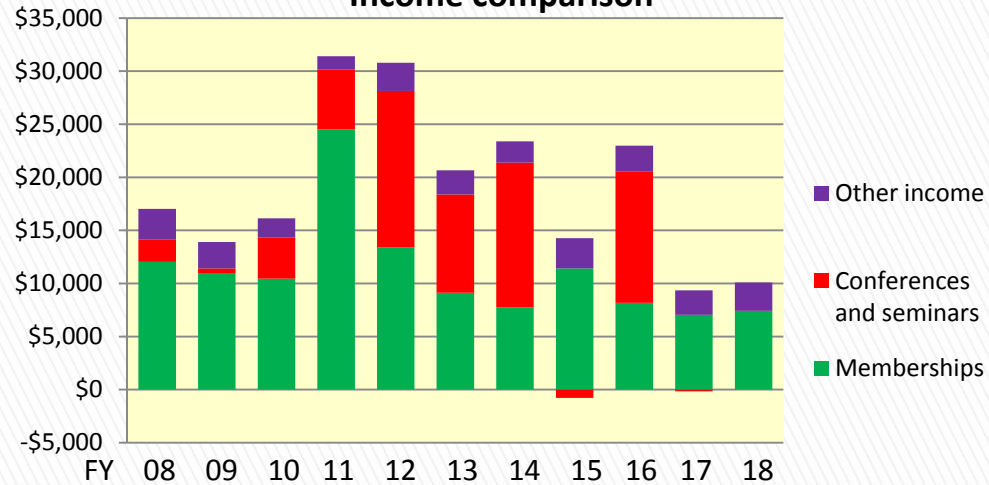


# Treasurer's Report

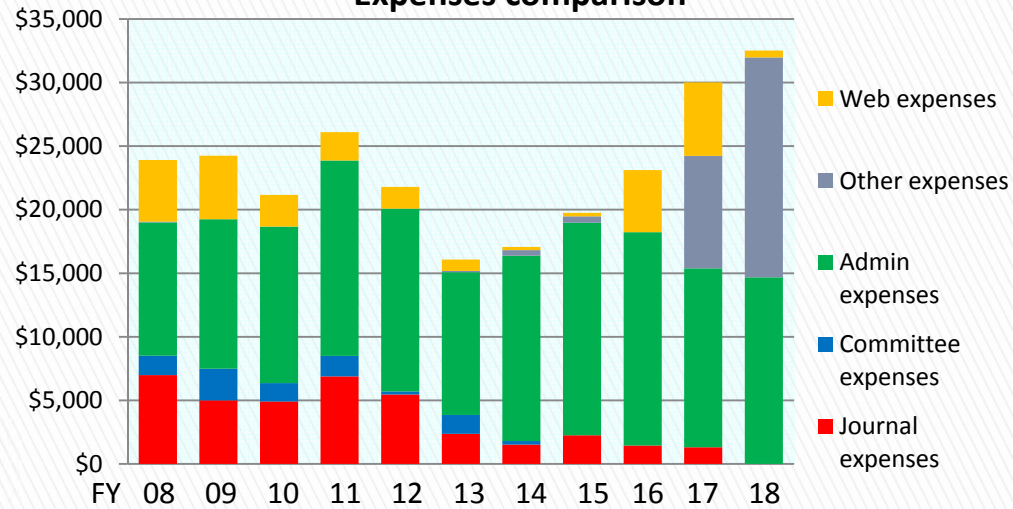
## Balance sheet history

### 2008 to 2018

**Income comparison**



**Expenses comparison**





# Treasurer's Report

Balance sheet history  
2008 to 2018

Income and Expenses

