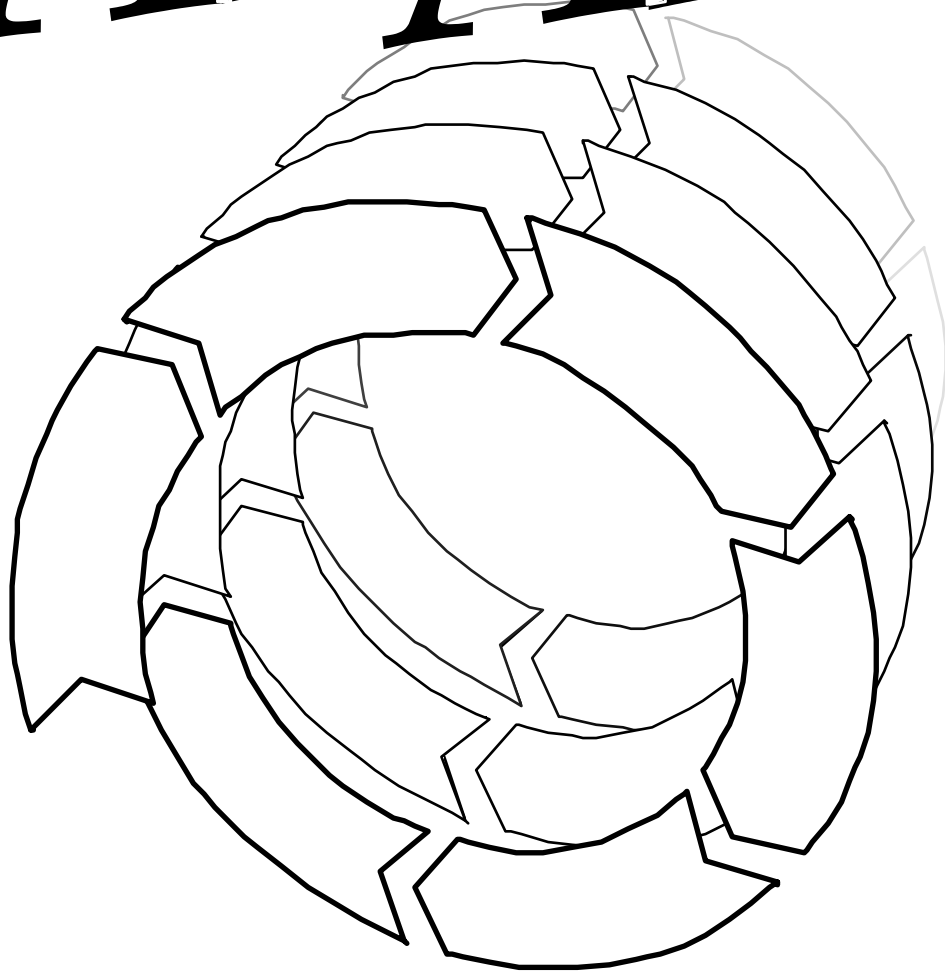


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ALARPM is a strategic network of people interested or involved in using action learning or action research to generate collaborative learning, research and action to transform workplaces, schools, colleges, universities, communities, voluntary organisations, governments and businesses.

ALARPM's vision is that action learning and action research will be widely used and publicly shared by individuals and groups creating local and global change for the achievement of a more equitable, just, joyful, productive and sustainable society.

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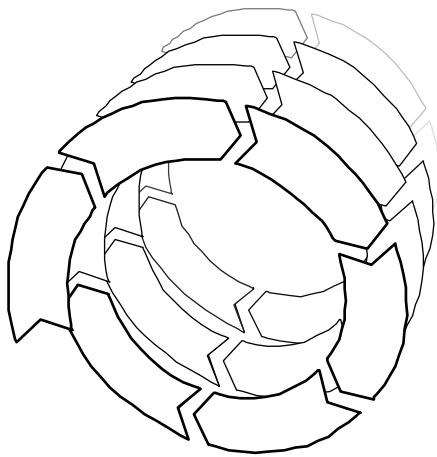
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Editorial

Welcome to the ninth issue of the ALAR Journal and my first as editor. Before beginning, however, I want to take this opportunity to thank Ron Passfield, our outgoing editor, for his outstanding contribution to both ALARPM and the ALAR Journal over many years involvement. Our achievements have been due, in no small part, to Ron's leadership, energy and commitment. Ron will be staying on as Consulting Editor, which is just as well, because I am certain I will need to consult with him quite often. Thank you Ron.

In this issue we bring you three excellent articles. First, Dr Merv Wilkinson and Lisa Ehrich, QUT, Brisbane, explore action research as a methodology for organisational cultural change. Second, Tom Bourner and Paul Frost, University of Brighton, England, report on the findings of their study into participant learning outcomes in *open* and *in-house* action learning programs. Third, the generic model for action learning and action research programs, presented by Dr Ortrun Zuber-Skerritt, acts to summarise many of the insights gained in the previous two articles.

In "People" we introduce Stephen Kemmis, Congress Advocate for 5th ALARPM and 9th PAR World Congress being held at the University of Ballarat in September 2000.

In "Noticeboard" we bring you an update from the organising committee on the opening plenary and cross-stream sessions. We also call for expressions of interest in conducting World Congress 6.

In "Networking" we bring you information on a new ALARPM email discussion list.

In "Bookshelf" we review Rory Lane's recently published book *The WLDAS Model*. This book offers a mix of practical and creative approaches to problem solving.

Action research revisited: Can it assist organisational cultural change?

Dr Mervyn Wilkinson and
Lisa Catherine Ehrich

Abstract

In recent years action research has received recognition as an effective methodology for facilitating change in a variety of organisational learning and change management contexts. It is evident in community settings, educational establishments, public service and business organisations and workplaces, and as a means of bringing about the transformation of organisational culture.

This article begins by re-examining the notion of action research and its potential for creating organisational learning and cultural change in the workplace. The discussion includes what we believe are phases of organisational learning and change that constitute the action research process and its links with cultural transformation in organisations. The article concludes by raising some dilemmas and issues surrounding the action research methodology and its contribution to organisational cultural change.

Introduction

A so-called “action research” approach to cultural change in organisations has been described as a catalyst for transforming social relationships and structural problems that exist in organisations and work groups (Kemmis and McTaggart, 1988). It can be a useful tool for adult learning (Zuber-Skerritt,

1990) and workplace organisational change (Wilkinson and Delahaye, 1995) and a powerful intervention that helps enlighten people and awakens them from their previously unquestioned situations, and in some cases unconscious assumptions. It is a process of change, for individuals and collaborative decision makers in departmental sections, teams and groups and for strategic organisational development purposes. Public sector organisations, industry, hospitals, schools and rural communities are locations where action research has created solutions to bring about organisational improvements (Wilkinson, 1996).

Action Research Revisited

Action research is research-in-action. It is action-driven-by-research. It is praxis, of theory-in-practice and practice-steered-by-theory. Two aims of action research are to improve a situated context by empowering and involving all relevant players in the process. Carr and Kemmis (1986, p.165) state that action research aims to improve practice; improve understanding of the practice; and improve the situation in which the practice takes place.

Action research is an ideology as well as a technical process that managers and leaders of adult learning and workplace groups can utilise for change. It is defined as 'the study of a social situation with a view to improving the quality of action within it' (Elliot, 1991, p.69) and a form of reflective enquiry undertaken by participants in order to improve the rationality of their practices (Carr and Kemmis, 1986, p.162).

Action research is a challenge for management in terms of synchronising the visions of the organisation with those of workers/employees (Limerick and Cunningham, 1992; Zuber-Skerrit, 1992). It is a participative and collaborative, mutually beneficial, socially just, power neutral ideology and practice (Wilkinson, 1996); a process for improving workers practices as well as managerial objectives. Negotiation, conflict resolution, debate, discussion, reflection, advocating, admitting, asserting, problem solving and many more skills

are inherent in the process of enacting authentic action research.

The process involves special stages of questioning, planning, implementation and reflection in continuing cycles of improvement. Awareness raising and questioning is the genesis of the cyclical moments of action and reflection. The process involves planning and implementing actions to redress problems or concerns. But it is more than just problem solving; it is motivated by a quest to understand the world by changing it (Henry and Kemmis, 1985, p.2); strengthening commitment; encouraging progress towards particular goals, through involvement, ownership and empowerment.

Action research is a systematic process of inquiry into existing practices; it is a way of sharing professional understandings, discussing program intentions in a collaborative manner, acting out and generally sharing these ideas in the total organisational learning process.

As Kemmis (1994) among others notes, people engaging in action research in organisations:

- (A) **analyse** and critique their ideas and theories about their practices; examine their work or personal practices with a view to change, if necessary; and
- (C) **critically** look at the context in which they work in order to discover the impediments to achieving quality outcomes from an organisational aspect.

There are many phases in the process of action research. Wilkinson (1995) describes four phases that are, in his view, the mechanical process core of action research. These are:

1. Questioning Phase

After the group has identified the area of concern or problem, a set of questions is developed. Specific questions may stem from the general focus question, however, the most important task at this stage is to ask questions that might give answers to what is actually going on. This means that participants need

to examine their organisational practices in a critically reflective manner and to change them if necessary. This stage calls for shared discourses that strive for an objective view of the situation under review. It helps people understand their reality as much as possible with the “onion layers peeled” and with knowledge about the micro- and macro- political contaminations of context exposed. It is the stage when the crucial reconnaissance is carried out; when the historical and social contexts and presage factors of economic and political consequences, for example, are considered and researched in order to build a platform of understanding for planning in the second stage.

2. Planning Phase

The second important stage in an action research methodology for individual learning and workplace change is the development of an action plan. Before actually constructing the step-by-step plan, preliminary research, staff training and development, and reading in the areas under investigation are all necessary. There are many different ways of making up a plan. In particular, *data gathering* procedures are critical to the design of stage two.

3. Actioning Phase

Having planned the action research process for learning and inquiry, the actioning phase involves the implementation of the action plans. It is important in the early stages of the implementation for group leaders to adhere to the plan in a structured manner, using careful data gathering, regular mini-reflection sessions and journal entries. These allow for a more reflexive and reflective unfolding of the study’s needs and situations. Action steps may be changed and the original questions may be refined in an effort to adapt to any new situations that might arise. It is important to start small and not try to engage in complex, many faceted actions at the beginning of the implementation phase. Much will depend upon the researcher’s individual style of operating and what procedures fit within the workplace context.

Data gathering is an important aspect of all stages of implementation and it requires critical reflection upon the experience.

4. Reflecting Phase

The fourth phase is a significant stage. It signals whether the actions have been successful or otherwise. It ensures that researchers move into the next spiral of questioning, planning, actioning and reflecting. Action research cycles in organisations never really end. The processes of change and learning keep spiralling onwards. The cycles continue in a systematic, unfolding of theory from practice through, for example, group reflections, which can be a highly productive way of analysing. The dynamics of the group, communication channels, organisational relationships, political dynamics, roles, agendas and differing world views of colleagues can all affect the outcomes and decisions for the next stage of questioning, actioning, implementing, reflecting and so on.

Action Research and Emancipatory Ideology

The critical nature of action research empowers and emancipates the worker and manager in ways that 'free' them from the shackles of their past programmed and institutionalised ways. It questions their possibly ineffective ways of doing and thinking about solutions to workplace cultural issues. In doing so, action research is ideological as well as mechanical. It is a theory of change based upon the importance of human involvement and the nature of the relationship between people in a free, power sharing, creative and innovative decision-making process that potentially leads to the successful resolution of issues.

Participation and collaboration are distinctive advantages in this approach to organisational improvement. Its action orientation and immediacy of implementation to the planning process and its interwoven nature give action research its greatest opportunity for success. This success is the

ideological stance of `praxis', which is a theory of and in practice.

If answers to questions about the intentions of action research as an ideology and methodology lead to ideas about the emancipation of individuals and their groups, more creative and responsive organisations, freedom from oppression by the organisation, greater productivity and social justice for all in the organisation, a better quality product for the clientele, and the unshackling of individuals and groups from master-servant relationships, then we are, in our view, on a path to the search for "truth" in terms of an organisational learning culture and towards real organisational improvement.

As a number of writers have indicated (Habermas, 1972; Kemmis and McTaggart, 1988), the most powerful aspect of the action research process is its emancipatory nature, irrespective of context, and its ability to take individuals further to the cutting edge, as it were, through enlightened actions based upon an analysis of the workplace environment and its liberating philosophy. Such projects give people power and control over their own professional lives and, in our estimation, this situation is a necessity for the sustainability of productivity and survival of institutions in 2000 and beyond.

Wilkinson (1996) notes that emancipation is linked to the ethical and principled use of the action research process for the benefits of all involved. Notions of social justice and equity are deeply embedded within this ideology of change for both managers and workers. It is intended to help disempowered, ordinary people, not just those with knowledge and organisational power. Our position is that action research has considerable merit for human intellectual capital development and organisational development, because it provides a structure that allows adults to learn in collaboration; to focus on real life problems in the workplace in a reflective and proactive way.

We believe that action research can be used in two key ways. Firstly, to enable adults in the workplace to reflect upon their

current work practices and conditions, and come to new understandings and learnings about the assumptions that may constrain their learning and work performance.

As individuals come together and generate solutions to issues that are shared and approached in a collaborative way, they develop a critical organisational learning culture that develops and triggers the climate for participative work and collaborative solutions within the organisation.

Mezirow's work is relevant here. He says that perspective transformation can lead the learner to 'take action to change social practices and institutions which implement and legitimate the distorting ideologies which enthrall us' (in Wilson 1992, p.187). In other words, the process of critical reflection may in fact lead to both individual and collective action. We agree and suggest that action research is the means by which workplace learners can critically reflect upon their work contexts, and from there, plan action both individually and collaboratively.

Secondly, action research has the potential to be emancipatory in that it has the power to change structures and reshape the organisation. Structures are in people's minds. Action research enables people to have their thinking stimulated to ask "why and why not and what if?"; to analyse their social situations and be a catalyst for their learning. Action research transforms their learning into further cycles of committed actions and reflections of learning and change.

The final scenario is one which relies on the collaborative effort of workers and managers acting as agents involved in critical reflective and transformative action for continuous organisational un-learning and learning for change. This leads to collective learning for organisations of people at the leading edge of research in practice. This is organisational learning (OL) (Garratt, 1994).

In our view organisational learning addresses the problems of individuals and groups in relation to social situations,

structural relationships, power dynamics, decision-making and communication cultures and climates within organisations. It is a concept that, when embraced successfully in a group, can assist to break down barriers to problem solving and creativity. It is not dissimilar in purpose to action research. Indeed, we argue that action research gives the learning organisation a methodology and synchronistic ideological base.

Organisational learning, however, may be impeded by complexity. Institutional reform is a complex mix of micro-political, macro-cultural and socio-economic matters requiring the attention of action researchers endeavouring to build a learning culture into an organisation. Patience is a virtue for action research facilitators engaged in nurturing an influential cadre of critically reflective leaders involved in core change activities to create a culture of openness and ongoing debate in a respectful climate, free of fear, threat or favour. These are critically important issues in an organisation of people, individuals and groups of learners that want to survive and grow with and in their organisations.

Managers are sometimes threatened by the empowerment of others. Managers who are action researchers and change agents may sometimes need to isolate resistors and circumvent managers who "tighten and frighten" people. Change agents facilitate and support change processes by helping individuals and groups in organisations build learning teams to help deal with problems and issues that change people's lives. Leaders in organisations seek to develop group cultures in order to handle change.

Managers realise that change can be planned and unplanned; occur as a result of the change agents' direction setting or be a spontaneous response to environmental pressures in the workplace. Given the social and organisational structures in which we work, we believe we need to have a well-developed system of values and processes for change within our human resource systems. These cadres of people help to address

questions within the above contexts of change that create a synergy of organisational purpose, aims, objectives, strategy, structures and cultures, climates, tasks, technology, recruitment and selection, human resource management and, training and development. When these systems of values are set up, managers using an action research process can deal with changes more easily.

We realise that workplace attitudes and behaviours are often difficult to change. Action research is one approach to resolving complexities that assists organisational learning in the workplace.

It involves a shared power strategy of targeting norms of workplace cultures and re-educating people through action and reflection cycles that are based in everyday practice and collaborative processes that understand the nature of issues and the establishment of goals and actions.

Action research process leaders and facilitators of adult learning need to respect people's discomfort about workplace deliberations that suggest changes are needed to their professional lives. Managers of change need to deal with resistance to changes by ensuring respect for workers concerns and aspirations together with the company's visions through participation and involvement, facilitation and support, negotiation, agreement, education and communication. As we know, forces of manipulation, power and explicit and implicit coercion can become part of the micro politics of organisational change. We do not believe those characteristics should be part of the behaviour of action researchers.

Action research leaders should strive to facilitate not manipulate, empower not disempower within cultural, sub cultural and political terrains and dynamics of institutions.

In spite of the difficulties and complexities, action research can be organisationally oriented, managerially steered, and instrumentally driven through techniques and processes to improve the company or institution. It can also be a very

strongly community-oriented process that helps groups of people become “teachers” of themselves by raising their group consciousness by becoming aware of how organisations are structured.

We engage in action research by trying to change or reconstruct social relations and social structures in a quest for equity and social justice. In this sense the process is a social technology; a way of doing and of taking action.

We see action research as a way to unshackle an organisation from its organisational stasis or from its traditional structures, its old world styles of leading and involving people, as well as facilitating organisational improvement. It is a process that can, if applied in an academically rigorous manner, break people out of their “sleeping” assumptions and allow them to begin the processes of workplace or individual reform. It can be done by asking the pertinent questions, by planning, actioning and reviewing the results prior to launching into the next meta-cycle of improvement.

Dilemmas and Issues

Several dilemmas exist, however. Emancipatory action research does not endear itself to old organisational values of traditional, classical, hierarchical decision making or of managerial control and power over workers generally in an autocratic sense. Action researchers of the new millennium need to respect people in responsible, hierarchical positions, or in oligarchies of control, the key word here is ‘responsible’. The concept of emancipatory action research is about responsible, democratic and participative management. It is a participative, collaborative, empowering decision making paradigm for dealing with the issues in our workplaces and learning places. It endeavours to empower, not disempower. It is worker centred, not management centred and herein lies the great dilemma for industry and unions. How do these groups work together?

We challenge others to suggest a way through this possible stalemate and conflict situation; this micro- and meta political terrain. How do we apply the ideas of individual emancipation and collaborative worker action and managerial acquiescence? It is about individual actions, participative decisions, consensual reflections and reactions for improvements in workplaces, not only in terms of managerial visions but also from the point of view of workers' operations. We suggest action research.

Conclusion

We believe that action research gives an opportunity to managers and workers in organisations to break out of potential professional and institutional mediocrity and bust the covert unconscious agendas and mindsets of people in the team, the organisation, and the company. It is about learning together, learning in action, through open-ness of communication and questioning decision making that shackles our progress within the ever-changing currents, ebbs and flows of organisational realities. But it needs people in charge who are committed to the ideology and the process.

This paper has reviewed the action research approach and examined how it links with the transformative actions for organisational cultural change. Whether action research is individually or collaboratively oriented, it involves a great deal of self-understanding and reflection-on-action. These are two significant issues that have the propensity to lead to organisational learning and enlightenment. In short, we have argued that action research is an act of change. It is a process that investigates reality in order to change it (Fals Borda, 1994). We have seen the process happen and work for many people. It is, in our experience, a process for organisational change and learning.

We have argued that action research is not only a methodological tool but also of value for building a better company, institution or group of workers and managers. Action research is not just about techniques, but also about the

underlying values and assumptions of why we as managers and workers do what we do, and how we do things. It is a cultural artefact based upon particular values. Consequently, if leaders are to embrace action research, they must realise that it is a process that empowers through the critical development of people.

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Merv Wilkinson PhD, MEd, BA, CertT, currently lectures in adult learning, programming and workplace education and change, researches and writes from his academic base in the School of Professional Studies, Faculty of Education, Queensland University of Technology (QUT). His PhD studied aspects of organisational change and process consultancy. He is involved in consultancy and research work with schools, school support centres, and in other adult learning institutions, workplaces and organisations as a change management process consultant and facilitator of organisational development and problem solving workshops. Merv's expertise and interests lie in working with a diversity of organisations in the facilitation of groups as a process management consultant in organisational culture change. He has embraced the action research approach in his consulting work over the last 15 years and he sees action research as a significant empowering process for managers and other people in public and private institutions.

Lisa Catherine Ehrich M.EdAdm, B.Ed, Dip. Teach, is an Associate Lecturer in the School of Professional Studies in the Faculty of Education at Queensland University of Technology. She is currently enrolled in a PhD investigating phenomenology as a methodology to investigate school principals' conceptions of learning for selves and others. She has an interest in action research and has participated in several action research projects in the area of gender, professional development for teachers, and teacher education. Lisa has been involved in consulting with a number of

organisations in which she has utilised action research in teams to reflect upon and review and plan programs. She has an interest also in adult and workplace education in which she currently lectures at QUT.

Both Merv Wilkinson and Lisa Ehrich are committed action research practitioners and theorists who are very keen to initiate dialogue with managers and other human resource professionals through journals and workshops in the application of action research for more productive, efficient and effective, happier and healthier workplaces in Australian public and private institutions and industry and the community in general.

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Learning outcomes of action learning: Open programmes and in-house programmes

Tom Bourner and Paul Frost
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Abstract

This article reports on the learning outcomes of managers who have participated in action learning programmes. We make the distinction between *in-house* programmes where all the participants are from the same organisation and *open* programmes where participants are drawn from different organisations. We seek to answer the question: are there systematic differences in the learning and development outcomes of these two types of action learning programmes?

We wrote to people who had participated in open and in-house programmes of action learning to ask them to tell us of their reflections of any learning outcomes they may have experienced. Participants in open programmes reported more learning of a personal kind, learning associated with the development of self-understanding. The responses of the participants on the in-house programmes suggest that action learning may have been undervalued in terms of its contribution to team-working and team-building. The main *common* learning outcome, reported by both groups, was learning about how they learn.

Introduction

There was a time (only a couple of decades ago) when action learning was a heresy within both management development and educational establishments. In this last decade of the twentieth century it is riding high. According to research funded by Department of Employment in Britain, by the end of the 1980s action learning was among the ten most used methods of management development identified out of ninety different methods and approaches to management development (Boydell, Leary, Megginson and Pedler, 1991). By the early 1990s Mike Pedler was able to write:

“The six-month management development programme which has a ‘start-up module, monthly learning sets, occasional workshops and a final workshop’ has almost reached the status of a new orthodoxy in some quarters.” (Pedler, 1991, page xxi)

In recent years, action learning has also made significant inroads into higher education (eg within Certificate, Diploma and Masters courses in management and also in teacher training). The extent of the inroads by the mid-1990s was clear in the survey of action learning in UK business schools and university departments of management (Frank, 1996). More recently Bourner, Cooper and France (1999, forthcoming) have detailed its use in 29 courses across 6 faculties within a single university.

Action Learning Practice

Much has been written about action learning since Revans first introduced the term in the 1940s (Revans, 1945). The library of the International Foundation for Action Learning contains over a thousand items on action learning. Practitioners, educators, management developers and consultants, however, have written most of the items. In 1994 Weinstein wrote:

"...there is still nothing on the market that describes the experience of participants. Yet we practitioners make claims for action learning and what it achieves." (Weinstein, 1994, p.17)

By contrast, this article focuses on the experience of the participants; the learning outcomes of participating in a programme of action learning are reported in the words of individuals all of whom were participants.

The value that a reader finds in this article will probably reflect quite closely the extent to which our conception of the practice of action learning matches his or her own. For us action learning in practice has the following properties:

1. *Real issues.* Action learning is based on grappling with real tasks (rather than those created for a pedagogic purpose).
2. *Dialogue.* Learning with and from others, who are also engaged in managing real problems.
3. *Personal responsibility.* Members of the action learning set retain responsibility for solving their own problems. In this respect an action learning set differs from a project team or a task force.
4. *Action-based.* Members of the action learning set are concerned with implementing the actions explored in the group. They are not simply seeking theoretical solutions.

The Experience of Action Learning

According to Revans (1983) there are "four principal exchange relations for designing action learning programmes": (i) a familiar problem in a familiar setting, (ii) a familiar problem in an unfamiliar setting, (iii) an unfamiliar problem in a familiar setting, and (iv) an unfamiliar problem in an unfamiliar setting. Closely related to that taxonomy is the "simple matrix" of Bob Garratt (1991):

“...There are characteristics of successful programmes which depend on a combination of project type and situation. The simple matrix which describes these can be shown as...”

Table 1: Characteristics of successful action learning programmes

	Own job	Other job
Own organisation	Own job projects	Internal exchange projects
Other organisation	Technical expertise exchanges	External exchanges

Such *theoretical* taxonomies of action learning contexts are valuable as they suggest alternative options for action learning programmes and they invite us to consider the different learning and development outcomes of each of the different situations.

In *practice*, however, the contextual distinction that has been most evident in the short history of action learning is whether all the participants of an action learning set are from the same organisation (possibly colleagues) or whether they are drawn from different organisations and different industries. We term the former ‘in-house’ programmes of action learning and the latter ‘open’ programmes of action learning. We would expect this distinction to affect learning and development outcomes.

To date the large majority of action learning programmes have, almost certainly, been of the *in-house* variety - usually instigated by management development consultants. Most of the *open* programmes of action learning have probably taken place in institutions of higher education. This raises an important question for action learning; are there systematic differences in the learning and development outcomes of *in-house* and *open* programmes?

Method of Identifying Learning Outcomes

In order to discover participants' perceptions of what they had actually learned from participating in action learning programmes we wrote to people who had been participants of five *in-house* action learning sets and five *open* sets, asking them for their reflections on their "experience and learning outcomes of being an action learning set member". Each of the action learning sets had between five and seven participants and a set facilitator. We analysed the written responses of the participants by iteratively grouping together verbatim comments on similar themes and then observing the pattern of common themes that emerged. It is these themes with illustrative comments that are reported below.

The *open* programmes of action learning were part of higher education courses at a university. The participants had been enrolled on one of four courses: a Certificate in Management Studies, a Diploma in Management Studies, a Postgraduate Diploma in Business Research Methods and a Research Degree programme. The range of organisations from which participants came included BT, Glaxo, Cornhill Insurance, the Department of Trade and Industry, Gillette and the Ford Motor Company.

In the case of the *in-house* action learning the participants in each set were managers from a single organisation. The *in-house* programmes were shorter than the *open* programmes, each lasting six months, and they did not lead to a qualification.

We acknowledge that the *open* action learning sets were part of qualification based programmes in a university. Given the paucity of open programmes of action learning outside institutions of higher education, we had little choice in the matter. The reader will have to decide whether differences from the learning outcomes of *in-house* programmes are due to the *openness* of the action learning sets or the fact that they were part of qualification based courses in a university. We should also mention that the range of functions and positions represented by the participants in the qualification based open programmes were greater than in the in-house programmes. Sets in open programmes contained participants right across the spectrum from chief executives and managing directors to senior functional managers in finance and HRM to specialists in IT, marketing and engineering to head teachers and lecturers. By contrast, the sets in the in-house programmes tended to contain people at a similar level within their organisations.

All the action learning sets were facilitated by one or other of the two authors of this article. We learned about action learning together through membership of the same action learning set in the mid-1980s and have recorded that experience in Segal-Horn, McGill, Bourner and Frost (1987). Since that time we have been colleagues in the same university and partners in the same management development consultancy. This homogeneity of experience led us to share similar views on facilitating action learning sets and it should ensure that the differences in the learning outcomes identified in this article are not the result of differences in facilitator style or input. It should also ensure that any differences discerned in the learning outcomes between the *in-house* and *open* sets were not a result of systematic differences in operational aspects of the sets.

All of the action learning sets met for a full day each month and adopted the same basic procedure: the focus of attention of the group rotated around the set participants such that the problem(s) of each participant in turn came under the gaze

of the whole group, for a portion of each day. During that time the purpose of the set was to help the participants find actions that might help them move forward and to learn from the results of actions taken. In the words of two of the participants:

“ ... Each meeting started with a short session in which members could raise any issue considered urgent. The time was then allocated to each member and it usually happened that each member had approximately one hour to discuss concerns regarding their project, personal learning etc.”

“... The time (was) divided equally between the set members, although this time allocation could be subject to negotiation and moved to give a member extra if it was thought necessary. Formal minutes were not kept by the set as it was thought that this would be of limited value and would stop the participation of the minutes taker. However, one member of the set, including the facilitator, would take it in turn to summarise the ... 3 or 4 tasks that each set member should have carried out by the next meeting.”

The rest of this article records the learning outcomes reported by the action learning participants and their reflections on them.

Findings 1: Lessons from the in-house programmes

Some of the learning reported by our respondents was specific to the individual participants and to the projects that participants brought to the set to work on and some was of a more general kind. It is the latter that we focus on below, because that is what we can reasonably compare with that of the participants of the *open* programmes. In most cases, we have given quotes from two of the participants for each category of learning revealed in the data to give the ‘flavour’ of the responses.

Lessons about colleagues as people

Many participants reported that they came to see work colleagues 'as people':

"... I got a better understanding of other team managers as people (in addition to their roles as managers)."

"... I learned to see the members of the Area Management Team as people."

Of course the set members always knew that their work colleagues were people, so what did they mean by these statements? Presumably they meant that they learned this fact in a new way, beyond simply cognitive 'knowing' - perhaps in a way that affected how they related to them as colleagues outside of the action learning set meeting. This is one of the claims made for forums, including action learning, that encourage 'dialogue' at work (Dixon, 1998).

Also, seeing work colleagues grapple with their own problems is a reminder that colleagues are human beings as well as the occupants of job roles. In this sense action learning seems to be a humanising experience for work colleagues.

Lessons about trust

Is it possible to *teach* people to trust? According to the participants:

"... The programme developed more trust in colleagues which had a positive influence on the work of the Area Management Team."

"...I learned more about my colleagues and learned that I could place more trust in them."

It is very likely that learning to trust colleagues and learning to relate to work colleagues as people are closely related. This may be one of the most important learning outcomes from an in-house action learning set.

Lessons about role as a manager

Learning is partly about making meaning and discovering new meanings as old situations are reframed. All of our participants were managers and some found new meanings for themselves in their management roles:

“... Provided an opportunity to develop a new perspective on my role in the management team.”

“ ... Eventually became a forum to evaluate oneself as a manager.”

The latter comment suggests the development of greater self-understanding as a manager. One participant went further and said that being part of an action learning set “...helped to identify a range of training needs.” This could suggest a mutually supporting relationship between the ‘Q’ of action learning and the ‘P’ of training.

Lessons about the organisation

In addition to understanding of the role of a manager and management self-awareness, some participants learned lessons about their own organisation and the people who comprise it:

“... We all got more awareness of how our present structure can work against our aims and objectives.”

“... I discovered the value of other team members’ skills and knowledge.”

These responses reflect the fact that the participants had been members of *in-house* sets: this learning was organisation-specific.

Lessons about time management

The problem of finding the time to ‘drain the swamp while attention is focused on coping with the alligators’ is one that probably afflicts many managers. To some extent it is a problem of time management. Short courses based on ‘tips for time-management’ are often rated by those who attend them as enjoyable experiences but with little long-term

benefit. Action learning helped at least some of the participants to become better at managing their time:

“... I learned how to manage my time better.”

“... Time can be created by effective delegation.”

The fact that an action learning programme usually lasts over at least several months helps to sustain a participant's focus on time management and commitment to acting on the lessons learned.

Lessons about project planning

A corollary of the value that participants placed on the thinking time that the action learning created was the lessons that they learned about project planning:

“... Making time to plan is important.”

“... Managers should take the time to think before taking action.”

“... The importance of planning.”

“... Time planning should be undertaken in relation to work-load.”

It is likely they always knew that it makes sense to take time to plan projects, just like they know that their work colleagues are people. However, the fact that some participants mentioned it as a specific learning outcome of action learning suggests that they came to know it in a new way. Perhaps they learned it in a way that meant that they might actually do it rather than pay lip-service to it. Since the programmes of action learning contained no programmed instruction on project planning we can only assume that they learned this lesson through experience and practice rather than through theory.

Lessons about learning

Some participants reported lessons about learning itself:

“...I discovered that action learning requires action.”

“...I am now convinced that action learning works and will try to develop it in my organisation. The heart of it lies in the structure, the discipline, and the group.”

The significance of the first of these comments should not be underestimated. If it implies a realisation of the importance of action in the process of learning then that person's life will have been much affected by the experience of action learning. The second comment suggests a developing understanding of what makes action learning 'work' and how to work it.

In the next section, we look at the general lessons that the participants of *open* action learning sets reported.

Findings 2: Lessons from the open programmes

Again, much of the learning that participants reported was about specific problems and projects. For example a participant mentioned how the set had helped him to learn about implementing questionnaire surveys to generate psychometric information:

“... I can recall on one occasion that I enjoyed the direct help of my set quite clearly, it was when I was compiling a questionnaire to establish certain psychometric characteristics of the subject group of my study. I asked the set members to complete the questionnaire and comment on its form, appropriateness, ease of completion and so on. As they had gained a similar level of research expertise, their thoughts were invaluable and had a profound effect on the result.”

It is not our intention in this article to catalogue learning as specific to individual projects and participants as this example, but rather to report the lessons of a more general kind and of wider applicability that can reasonably be

compared with the learning outcomes of the in-house programmes.

Learning to help

In action learning set meetings the set members are not there to solve each other's problems; they are there to help each other to learn from solving their own problems. According to participants:

"... It was difficult at first to understand how to get the most out of the set, I wanted to solve everyone else's problems and hoped for solutions to mine. This doesn't happen. We are helping each other solve our own problems. This was a major lesson for me as my management style needed change from a 'solver of other people's problems' to that of an 'enabler' who helps others to solve things for themselves."

"... Shapes own style, maturing thought for others rather than self spills into the work situation."

This is a transferable skill which set members can take into their management practices.

"Our problems are similar."

Participants learned the similarity of many managerial problems even though the managers are located in different organisations and different industries. They learned to place their own problems in a broader context:

"... The main benefit of the set meetings (we meet once a month) has been the understanding of other people's problems. They have helped me to put some of my own work problems into some sort of perspective. Many of our problems such as time constraints are similar."

It is likely that as a result of their experience in an open action learning set these managers would be less susceptible to 'not invented here' resistance to ideas from outside of their own organisation. Such resistance can result from the belief that 'there's not much that we can learn from

elsewhere, because we are different from elsewhere'. It is a relatively small leap from recognising that other managers faced similar problems as themselves to learning to be more open-minded and more receptive to ideas from outside of their organisation.

As set advisors we have often observed the rise in the self-respect of managers from the public sector as they learn that managers in their sets from the more esteemed private sector face similar problems to themselves and that they have no better ideas for dealing with them than themselves.

Learning to give and to take

When an action learning set is new some set members find it much easier to give than to take. They are anxious to contribute whatever they can to the problems of the other set members. They are less capable of receiving with an easy grace; simply taking, from what is offered, that which they can use. This is what one participant learned:

“... It is impossible to accept everybody's advice, and help can only be given with the knowledge that it may be rejected. Conversely, members know that help is offered on these terms and that there is no personal slight attached to any rejection of help.”

For some participants it was a revelation that receiving gracefully can be a gift to the others as it permits them to contribute, which is what they want to do:

“... There are two parts to set interaction: the give and the take. Both are contributions. Most of us feel that we take more than we give.”

“...There is an understanding that each member's project is their own. Consequently, advice proffered can be taken on board by the recipient or rejected.”

Other participants learned lessons about giving and the interdependence of giving and receiving.

“... There have been occasions when members have surrendered their own time to another when their need was dire. Indeed this was not considered to be waste of time by those surrendering their time, as assisting each set member is mutually beneficial.”

“... The stimulation is maintained by the diverse personalities with their diverse backgrounds and the need to be attentive so that one may put something back into the collective pot for others to gain value from.”

And some participants were able to apply the lessons that they drew from their experience of interdependence and interaction in their action learning set to their relationships outside of the set:

“... Helped me to interact successfully with others.”

We would like to have had that participant's assessment of how this impacted on his effectiveness as a manager but we decided that we could not recontact him to probe without leading him on the issue.

Learning to value differences

If there is value to be had in giving and taking then the greater the diversity of the members of the set the greater the range of contributions:

“ ... Age doesn't matter: past experience can be utilised to improve the present, both at work and home. Everyone has something to offer.”

Action learning helped some participants to learn that “everyone has something to offer.”

Learning to question

Action learning has been described as “a questioning approach” (Lawrence, 1986). What is the value of questioning? Here is the answer of one respondent:

“When people ask you questions in a set you come up with answers that you wouldn't think of on your own.”

Action learning helps people to question in a helpful way (See Beaty et al, 1993).

Learning to value being questioned

Being questioned is sometimes taken as a sign of criticism or lack of trust or lack of respect. It can produce a defensive reaction and a closing down of the shutters of the mind. In an action learning set the members experience being questioned by others who they know care for them and want them to succeed. It can take time to learn how to make the most of that novel situation:

“... At times I feel the explanations I give to other set members about why I have decided for or against a particular course of action are a bit trite. Often I have been unhappy with the explanations I have given and then later done something differently as a result. This, I hope, improves the quality of my understanding and research.”

In helping people to learn how to be questioned without reacting defensively action learning can help managers to develop a more open management style.

Learning skills

Action learning develops skills in listening, questioning, offering feedback, etc. One action learning set of managers decided that they wanted an explicit symbol of the skills that they were learning. They decided that the whole set would learn to juggle and started each set meeting with a short juggling session:

“... Silly things can count for a lot, we have each learned how to juggle and we have each learned to improve on this skill as result of our own and collective efforts. Juggling is just an overt reminder of the benefits to us of this learning environment, and we have each learned a great deal more than how to juggle.”

Learning self-awareness

We sometimes ask managers to think back to the *most* effective manager that they have ever had and the *least* effective one and then to identify the differences. They very rarely offer differences in terms of knowledge of marketing, statistics or corporate strategy, etc. Instead they usually offer *qualities and skills* for which the pre-requisite is self-knowledge and the ability to act on that self-knowledge ('flexible', 'visionary', 'calm in a crisis', 'developer', 'supportive', 'inspirational', etc.).

According to our respondents:

"... Working within a set develops the most important part of learning: yourself! Not until you understand yourself emotionally can you go on to manage or assist others both at home or at work."

"... The environment has enabled me to express and understand aspects of my personality that I would normally choose to bury. I am not suggesting that all set meetings are conducted in the 'psychiatrist's chair' mode. On the contrary, discussion has tended to be constructive and practical directed towards our projects and philosophical aspects of learning."

"... I would say that the set work has enabled me to identify my own (and others) strengths and weaknesses."

Tom Reeves (1994) has expressed it thus:

To be effective, your managerial behaviour needs to be consciously directed and controlled. Putting that the other way round, managerial action should not normally be directed by unconscious motives ... Having self-insight and being able to act on one's insight is a prerequisite of being personally competent. (Reeves, 1994, pp 24)

Personal development manifests itself in being less controlled by 'drivers' which are often, at least partly, out of conscious awareness. Recognising those drivers is the first

stage in freeing oneself from them. This means more choices about how to think, feel and act.

Learning about learning

Action learning can work at the level of (1) finding a solution to a problem, (2) learning how to find a solution to a problem and (3) learning how to learn how to find a solution to a problem. Participants learned some lessons about how they personally learn, about learning processes and about action learning in particular:

“... I found it difficult at first as I had been used to learning by being told rather than finding out for myself. I now find the search for relevant information quite enjoyable, although at times I feel a bit uncomfortable with action learning as I don't always know in advance which direction things are going to take.”

“... Having been a practising teacher for 8 years, the Action Learning approach to the Diploma in Management Studies (DMS AL) at the University of Brighton was of particular interest to me. ... The more traditional approaches to learning in which the activity is highly structured and the learner is told what his objectives are and which resources to use, can be restricting and uninspiring. But, create a situation in which a learner identifies his objectives, adopts appropriate strategies, selects suitable resources, monitors own progress and creates a meaningful learning environment and you have provided a learning experience which is more relevant, meaningful and can give the learner a sense of ownership and a greater sense of commitment. The latter, in my view is what the Action Learning programme can offer.”

“... Involvement in an action learning set can be likened to a bank account; the more you put into it, the more you can expect to get out of it. The more help and

support that you give your fellow set members, the more that support is reciprocated.”

“... I think we all realised fairly quickly that there are no free rides in an Action Learning set, you only get out of it what you put in; if you come to the set meeting with little or no idea what you want out of it, that is all you will get. I and most of the members of our set would generally arrive with some aspects of the research that the set members could participate with.”

The last of these participants had clearly learned how to learn with action learning.

Conclusions

The growth of action learning over the last decade is not too surprising as it has been advocated as a means of learning and development for changing organisations in changing times, and few would deny that times are changing for organisations. Moreover, it resonates strongly with current themes of reflective practitioners, learning organisations, continuous professional development, lifelong learning and the learning society.

In this article we make the distinction between in-house programme of action learning and open programmes. In-house programmes comprise participants from the same organisation. Open programmes comprise participants from different organisations. We believe that most programmes of action learning have been of the in-house variety and most open programmes have originated in universities and other institutions of higher education.

In the article we have reported the responses of participants of both in-house and open action learning sets to a written request about their learning outcomes. In presenting the results we have omitted the learning outcomes that were specific to the problems/projects/issues that the participants brought to the sets to work on. Rather we have concentrated on the learning outcomes that were general enough to offer

some possibility of comparability. The results are summarised in Table 2. The table comprises the headings used in the text above, but the sequence of the headings has been changed to facilitate comparisons.

What are the differences that stand out in this table between the two columns? First, there was a lot of learning in the in-house programmes that are important elements of team-building and team-working: “Lessons about the organisation”, “Lessons about colleagues as people” and “Lessons about trust”. Action learning sets are not teams but it seems that in-house action learning has a significant contribution to the effectiveness of teams in organisations.

Second, the in-house programmes led to more learning that was explicitly about the manager’s role: in an organisation: “Lessons about role as a manager”, “Lessons about project planning” and “Lessons about time management”.

Third, the open programmes seemed to lead to lessons that were both more personal and yet also more general: “Learning to help”, learning that “Our problems are the similar”, “Learning to give and to take”, “Learning to value differences”, and “Learning self-awareness”. There was a time (especially the 1960s and 1970s) when the main problem in management development was seen to be the “transfer of training” i.e. how to transfer learning from the classroom back to the organisation. The emergence of in-house action learning offered a solution to that problem by using problems within a manager’s own organisation as the curriculum for learning.

Table 2: Learning outcomes of open and in-house programmes of action learning

In-house programmes	Open programmes
Lessons about the organisation	Learning to help
Lessons about colleagues as people	Learning that “Our problems are the similar”
Lessons about trust	Learning to give and to take
Lessons about role as a manager	Learning to value differences
Lessons about project planning	Learning skills
Lessons about time management	Learning self-awareness
Lessons about learning	Learning to question
	Learning to value being questioned
	Learning about learning

Our results suggest that ‘compartmentalisation’ of learning is still present in in-house programmes of action learning but now it is a ‘problem’ of transfer of the learning from the organisational context to other dimensions of the participant’s life. By contrast, the learning of the open programmes is less confined to the participant’s current organisation and therefore is more transferable.

What did the learning from the programmes have in common? The item that stands out as common is the final item in both columns: “Learning about learning”. In the second column this is elaborated as “Learning to question” and “Learning to value being questioned”.

The only other systematic study of the experience of action learning from the perspective of participants is Weinstein

(1994, 1995). Where they touch, our findings are compatible with her findings but direct comparisons are difficult: although Weinstein (1995) draws the distinction between in-house (in-company) programmes and open (mixed company) programmes she does not directly compare the learning outcomes of these two varieties of action learning. It would be interesting to re-analyse her data on the basis of this distinction.

How would we summarise our conclusions? For us, the headlines from the study are as follows. First, open programmes are more likely than in-house programmes to contribute learning that is personal (eg 'self-awareness') and thereby more transferable. In a paradoxical way it is more *general* by being more *personal*. Second, in-house action learning has been under-valued in terms of its contribution to team-building and team-working. Thirdly, the study offers at least some empirical support for the claims of proponents of action learning that it helps participants to learn about how they learn.

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In our next issue of the ALAR Journal you will find ...

- an article on "Educational Cabaret" as genre of academic discourse
- parallel action learning structures: a dynamic model
- an interview with Ortrun Zuber-Skerritt
- reflections of *stream organisers* at World Congress 5th ALARPM and 9th PAR
- and more ...

A generic model for action learning and action research programs within organisations

Ortrun Zuber-Skerritt

Introduction

There is an extensive literature on Action Learning and Action Research (ALAR) relating to their nature, epistemology, theories, methodologies, methods, techniques, applications, examples and personal reflections. However, there is a gap in the literature, which concerns (1) the practicalities of actually designing and implementing a program, (2) the reasons for success and (3) the core values underpinning ALAR.

Therefore, the purpose of this paper is to fill the gap in the literature by (1) presenting a generic model for an ALAR program consisting of eight components, (2) explaining the success pathway with reference to Glasser's four basic human needs, and (3) suggesting five core values determining a successful ALAR program.

1.0 A generic model

The figure below presents the eight main components of a structured action learning program using collaborative action research as a methodology for addressing a major organisational problem, issue or concern. In all phases of this model, there is a cyclical process of *planning* (including situation and problem analysis), *acting* (or implementing the plan), *observing* (and evaluating the action), *reflecting* (on the results of the evaluation and on the whole process of

planning, acting, observing and reflecting) and as a result, revising the plan for a new cycle of action research.

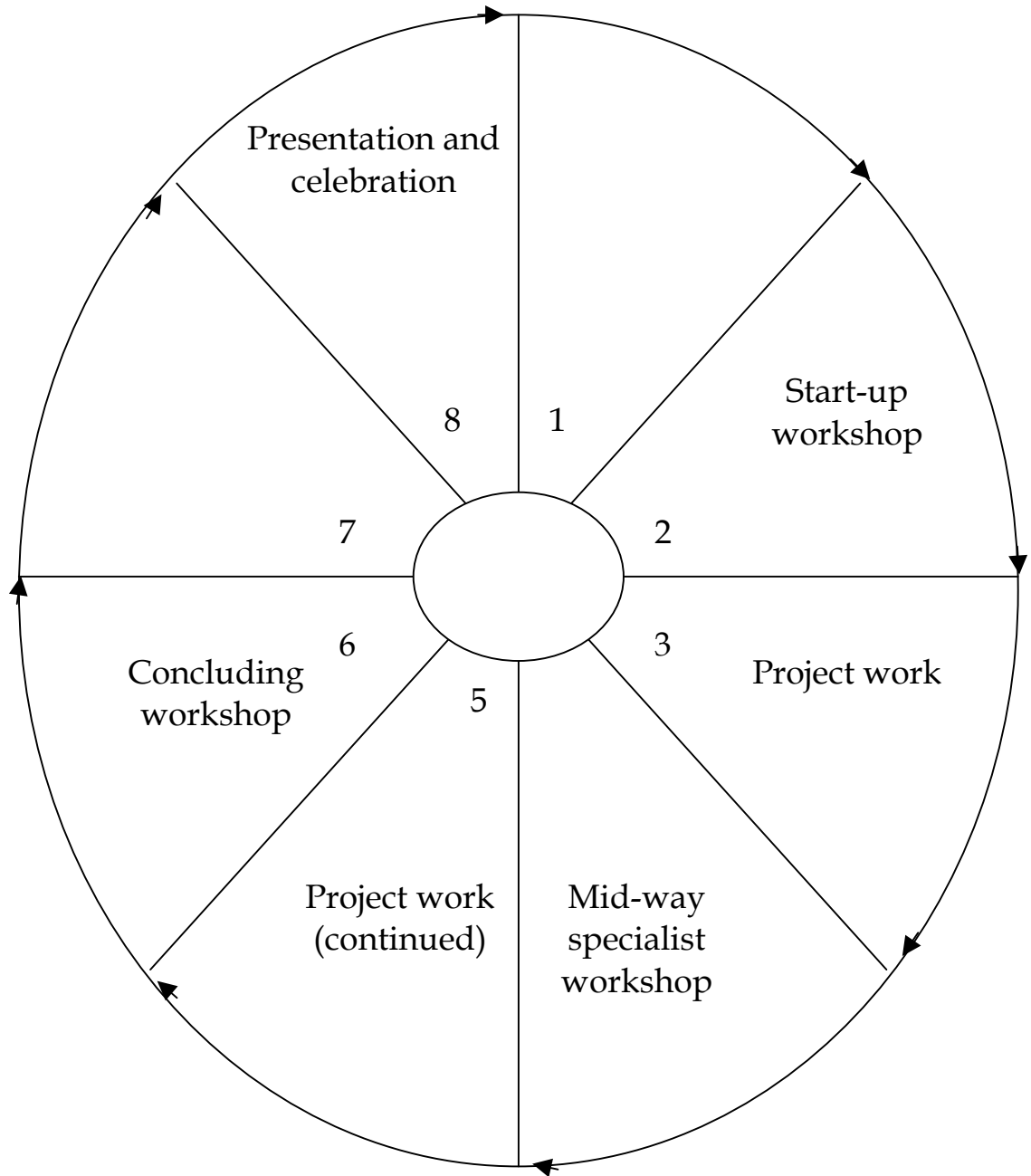


Figure 1: Eight main components of a structured action learning program

The following is a brief outline of the eight major phases in an action learning program:

- Problem definition and needs analysis
- Start-up workshop
- Project work
- Mid-way specialist workshop
- Project work (continued)
- Concluding workshop
- Preparing for presentations
- Presentation and celebration.

1.1 Problem definition and needs analysis

The first step is to identify the most serious concerns shared by a group of people in an organisation and to explore and decide what group project might be feasible for them to work on. Thus, the group identifies what Kurt Lewin termed a 'thematic concern', so that the team(s) can be selected and the project(s) can be defined. A team project is typically work based and of significance not only to the individuals involved, but benefits the whole organisation or section in an organisation.

It is advisable to provide background reading and resources before the program actually starts, so that participants have a common information base and understanding of the key issues and paradigms of learning and research.

1.2 Start-up workshop

Ideally, this workshop should be **residential**, away from the usual work and family commitments, in a pleasant environment conducive to discussion and learning from and with each other, both formally and informally (over coffee and meals, and drinks at the bar). Key areas to be covered depend on the project topics, but they also include:

- Vision and team building activities
- Introduction to Action Learning, Action Research and Process Management
- Project design, management and evaluation
- Qualitative research methods
- The use of Information Technology, the Library, electronic databases, and bibliographical packages, such as 'Endnote', 'Papyrus', etc.
- Starting the process of project planning, following the 'Figure Eight' process model. See Annexure A.

1.3 Project work

This is the action part of data collection, analysis, feedback to participants in the research, and collaborative interpretation of results. It also includes an ongoing literature review, and monthly action learning set meetings to monitor the progress of, and to support, project teams in their work and provide help as and when needed.

1.4 Mid-way specialist workshop

Half way through the program, a picture has emerged of what most teams need. So it is cost effective and sensible to bring the teams together for the following reasons:

- Providing input as requested
- Sharing problems and concerns, asking questions, exploring answers and solutions
- Discussing 'hot' issues and cutting-edge developments
- Inviting key speakers.

1.5 Project work (continued)

This is again the action and reflection part of the fieldwork, which should be brought to a conclusion. This means, for example:

- Interpretation of results in the light of the literature review
- Model and theory building (grounded theory and personal construct theory) and making tacit knowledge explicit
- Reflection on personal and organisational learning.

1.6 Concluding workshop

This workshop may be residential or not residential. It is designed to help project teams present and discuss their findings in first draft form and to reflect on their learnings, as well as sharing their problems and possible solutions. The following topics might be included to develop skills through workshop activities related to the project work:

- Writing for an audience
- Publishing in international, refereed journals
- Writing a dissertation (optional)
- Presentation skills for different audiences and media, e.g. for radio and television interviews, the difference between oral and written presentations; the use of OHTs, powerpoint and other audio-visual techniques; video productions, etc.

1.7 Preparing for presentations

Oral and written presentations are a vehicle for individual and team learning, reflection and conceptualisation, as well as a documentation of organisational learning, development, change, innovation and achievement. In unstructured action learning sessions this aspect of public presentation and accountability is often missing and as such the learning becomes transitory or unnoticed, not appreciated and not duly rewarded. If, however, an effort is made to go that extra bit further and to commit one's thoughts and findings to writing and public scrutiny, action learning becomes action research. This effort is of great value to the

participants themselves, because they become more professional, and they also add value to the reputation or legacy of their organisation. Such written work may be in the form of:

- Report for the organisation's executive and/or library
- Newsletter article
- Conference paper
- Published refereed paper in a national or international journal
- Dissertation for a higher degree, e.g. a Graduate Certificate, a Graduate Diploma, and a Masters or Doctoral degree.

1.8 Final presentation and celebration

The culmination of an action learning program is always the 'Presentation Day' when the relevant organisation(s), stakeholders and the wider community, the media and press are invited to witness this event. Brief reports from project teams are presented outlining their aims, objectives, achievements, improvement of the bottom line, learning outcomes for themselves and their organisation, and future action plans.

2.0 Pathway to success

It always amazes me how much time, effort and energy action learning teams spend on making their project and the final event a great success. I believe the reason lies in Glasser's (1984) classic theory of basic human needs which seem to be fulfilled in an action learning program. These needs are in four categories: success/worth, fun/enjoyment, freedom/choice, and belonging/respect/love.

2.1 Success/worth

The project teams come up with tangible results and successes, and they are publicly recognised and acknowledged by their colleagues, top management and a large audience.

2.2 Fun/enjoyment

Project teams work hard, but they have fun as well, especially in the start-up, mid-way and concluding workshops; and in the monthly meetings there is usually a lot of energy and excitement.

2.3 Freedom/choice

Project teams are free to select their topics, they are creative and innovative when exploring alternative solutions; and it is their choice to participate in the program.

2.4 Belonging/respect/love

Team members form alliances and networks. Gradually, they develop and share a common language and culture; they belong to the same paradigm of learning and research; and they respect and like each other. This brings me to another conclusion about the core values determining the action learning culture in a learning organisation.

3.0 Core values

I shall categorise these values in five concepts: synergy, team spirit, permeability, learning process, and symmetrical communication.

3.1 Synergy

Synergy is the willingness to share knowledge, information and skills for problem solving, and thus achieving a synergy, which (according to systems theory) is the value that comes when the whole adds up to more than the sum of its parts. In other words, an action learning group can achieve more collectively than they could individually on their own.

3.2 Team spirit

Team spirit is the willingness of team members to cooperate and collaborate in a team in order to create change and to make a significant contribution to the organisation(s) in which they work.

3.3 Permeability

Permeability is a term used in Personal Construct Theory, meaning a readiness to be open to self-criticism and critique from others, to admit one's ignorance or failure, to be honest to others and oneself, to use processes of self-reflection and reflection with others on and in action. For example, Revans (1991) encourages reflection through discussion of what is **not** going well and sharing this with 'comrades in adversity'.

3.4 Learning process

A focus on the learning process, as well as on action, tasks, products and improving the bottom line, is achieved through reflection and questioning insight. For example, reflection can be aided by keeping a log book or learning diary; and insight and tacit knowledge can be elicited through questions like: 'What have you learnt from today's session (or from the whole project or from the whole process of research and thesis writing)?' 'What were the milestones in your organisation's learning?' 'What was it that brought about organisational change?' Et cetera.

3.5 Symmetrical communication

Symmetrical communication is a term used in the Frankfurt School of Critical Theory and means mutual respect for individual needs and differences, recognition of each other as equal team members, and sharing responsibility for project outcomes as well as for processes of learning and team building.

Conclusion

A well designed and structured action learning program will develop these core values, meet participants' basic human

needs, contribute significantly to their professional development as well as to organisation development and innovation through addressing a major shared issue or thematic concern.

References

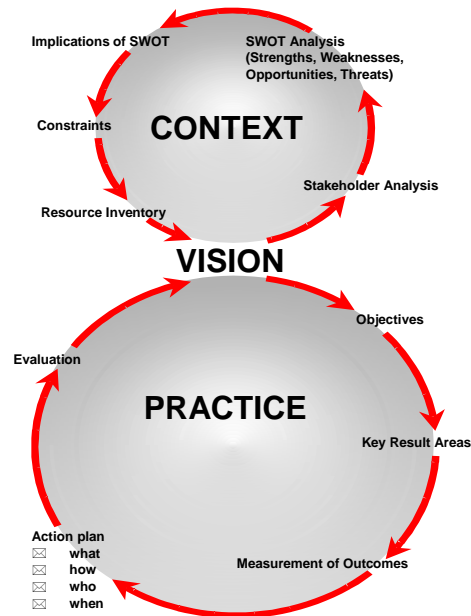
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Revans, R. (1991b) *Reg Revans Speaks about Action Learning*. A video program produced by Ortrun Zuber-Skerritt. Lismore, New South Wales, The WORLD Institute, Southern Cross University.

We welcome profiles of people engaged in action learning or action research. You could submit your own or offer to write one on behalf of someone you know.

Annexure A: The Figure 8 process of project design and management



This process model was developed by the design team of the Queensland University Action Learning (QUAL) Program and has been widely used in Action Learning programs in Australia, South Africa, Austria, Germany, Hong Kong and Singapore.

The model includes team and vision building exercises; context analysis: stakeholder analysis, SWOT analysis, implications of these for the project, constraints and resource inventory; and planning for improved practice: situation and problem analysis, aims, objectives, desired outcomes, outcome measures, action plan (what has to be done, by whom, how, by when?) and evaluation strategies and methods; then repeating this process of revised vision, context analysis and improved practice several times during the project implementation.

People

Stephen Kemmis



Stephen Kemmis is Congress Advocate for the 5th ALARPM & 9th PAR World Congress to be held at the University of Ballarat, September 10-13, 2000.

Stephen is Director of Stephen Kemmis Research & Consulting Pty Ltd, Professor Emeritus of the University of Ballarat, and Honorary Fellow of the Faculty of Education, Monash

University. After undergraduate work in educational psychology at the University of Sydney, he completed his PhD at the University of Illinois on educational evaluation and evolutionary epistemology. His developing interests in qualitative research and the politics of evaluation led him to the University of East Anglia, where he worked on democratic evaluation with Barry MacDonald at the Centre for Applied Research in Education. At East Anglia, he encountered the Ford Teaching Project, an action research project being conducted by John Elliott and Clem Adelman. This initial contact led to a continuing interest in action research in various settings – as a basis for self-evaluation in schools and universities, as an approach to community development, and in the development of Aboriginal education and teacher education.

He returned to Australia from Britain in 1978, and worked for 16 years at Deakin University. With colleagues there, he developed *The Action Research Planner* and *The Action Research Reader* (first published as course materials in a Deakin University action research course) and (with Wilfred

Carr) *Becoming Critical: Education, Knowledge and Action Research* (published by Deakin University Press and Falmer Press). He continues to publish in the field of action research, and on education and educational evaluation.

Since the early 1980s, he has championed critical action research – a view of action research aimed at helping participants in various social settings to understand the origins and social consequences of their practices, and at transforming their practices and their practice-settings in the interests of social justice. His theoretical work on action research draws on the social theory of German philosopher Jürgen Habermas. Some of these ideas are to be found in forthcoming chapters on action research for two Sage publications (out in 2000): a chapter on action research (with Robin McTaggart) for the *Handbook of Qualitative Research* edited by Norman Denzin and Yvonna Lincoln, and a chapter on action research and critical theory for the *International Handbook of Action Research* edited by Peter Reason and Hilary Bradbury.

In 1996-7, he was Pro Vice Chancellor (Research) then Deputy Vice Chancellor (Operations) at the University of Ballarat. As an independent consultant based in the coastal village of Cannons Creek on Western Port in Victoria, he now works on a variety of projects in Australia and overseas, including work on university development, the development of the theory and practice of action research, and various evaluation initiatives. He continues to have a strong interest in Aboriginal education and training – in recent years he has compiled a synthesis report on the implementation of the Western Australian Strategic Plan for Aboriginal Education and Training, and conducted a review of Indigenous Issues at the University of Western Australia. With Simon Marginson, Paige Porter and Fazal Rizvi, he recently prepared a paper on *Enhancing Diversity in Australian Higher Education* for the University of Western Australia (http://www.acs.uwa.edu.au/open_discuss/).

Noticeboard

In "Noticeboard" we bring you information about impending activities or resources, such as conferences, courses and journals. We welcome member contributions to "Noticeboard".

Update on World Congress 5 ALARPM / 9 PAR University of Ballarat, Victoria, Australia 10-13 September, 2000

With only four months to go before the 5th ALARPM and 9th PAR World Congress, preparations are moving into top gear. Following the distribution of the *Advance Program and Registration Brochure* in March, registrations are starting to come in. Those wishing to avail themselves of the Super Early Bird (until 15/5/2000) or Early Bird (until 31/7/2000) discounts are urged to register without delay. With over 18 outstanding keynote speakers and 200 contributed papers and workshops, the Congress promises to be a truly exciting event.

The theme of the Congress is reconciliation and renewal: *reconciliation* refers to the process of healing unwanted divisions between groups of people and is not restricted to racial disharmony; *renewal* refers to the process by which groups move forward together following reconciliation. The program is being organised around seven *streams*: areas of work and life where reconciliation and renewal are sorely needed. Most streams will have two keynote speakers plus a series of contributed papers, workshops and other forms of presentation. As well, in order to highlight issues of reconciliation and renewal common to more than one

stream, several plenary cross-stream sessions are planned. These include:

Opening Plenary: *From Cartagena to Ballarat*

This symposium will pick up some of the themes emerging from the 4th ALARPM/8th PAR World Congress at Cartagena and set the scene for the events to come in the following three days. Participants will include Professor Ortrun Zuber-Skerritt, Professor Stephen Kemmis, A/Professor Bob Dick, Professor Richard Bawden, Dr Mary Farquar, Mr Paul Chippendale, Mr Denis Looney and A/Professor Ron Passfield.

Symposium sponsored by the Institute for Development Studies, Brighton, UK

Participants will include Professor Robert Chambers (UK), Dr John Gaventa (UK), Ms Mwajuma Masaiganah (Tanzania) and several others. Many exciting projects using participatory action research in developing countries will be discussed.

Professor Robert Flood (UK), international consultant, editor of the international journal *Systemic Practice and Action Research* and author of eight books on management and systems.

Professor Yvonna Lincoln (USA), renowned action research methodologist, author of seven books on qualitative research methods and co-editor of the *Handbook of Qualitative Research*.

The streams, stream advocates, organising committee “buddies” and keynote speakers are as follows:

Organisational Learning and the Future of Work. Stream advocates Dr Victoria Marsick (USA), Dr Mike Pedler (UK) and Ms Megan Seneque (South Africa). Stream buddies Mr Ian Burness and Dr Sandra Billard. Keynote speakers Dr Victoria Marsick (USA) and Professor Susan Weil (UK).

Process in our Practice. Stream advocate Professor Ortrun Zuber-Skerritt (Australia). Stream buddies Dr Yoland

Wadsworth and Ms Diana Seekers. Keynote speakers Ms Deborah Lange (Australia) and Ms Susan Goff (Australia).

Indigenous Peoples. Stream advocates Professor Robin McTaggart (Australia) and A/Professor Jeannie Herbert (Australia). Stream buddy Mr Kraig Grime. Keynote speakers TBA.

Environmental/Agriculture. Stream advocate Ms Pam Swepson (Australia). Stream buddy Ms Diana Seekers. Keynote speakers A/Professor Bob Macadam (Australia) and Dr Martin von Hildebrand (Colombia).

Global Issues. Stream advocate Dr Timothy Pynch (Canada). Stream buddy Dr Colin Henry. Keynote speakers Dr Marc Lammerink (Netherlands), Mr Vijay Kanhere (India) and Professor Md. Anisur Rahman (Bangladesh).

Social and Community. Stream advocate A/Professor Jacques Boulet (Australia). Stream buddies Ms Diana Seekers and Dr Yoland Wadsworth. Keynote speakers Dr Susan Noffke (USA) and Dr Patricia Maguire (USA).

Personal Reconciliation and Renewal. Stream buddies Dr Sandra Billard and Mr Ian Burness. Keynote speaker Professor Isaac Prilleltensky (Australia)

For the latest information on the Congress program and on-line registration, please consult our website:

<http://www.alarpm.org.au/wc5&9>. For a copy of the *Advance Program and Registration Brochure* or **for further**

information on the Congress please contact the ALARPM/PAR World Congress Secretariat at:

The Conference Organisers Pty Ltd, PO BOX 1127
Sandringham, Victoria 3191, Australia.

Tel: +61 3 9521 8881

Fax: +61 3 9521 8889

Email: conforg@ozemail.com.au

Or visit the Congress Website

Visit our website for regular Congress Updates at
<http://www.alarpm.org.au/wc5&9>

Call for expressions of interest in organising World Congress 6

Excited by the forthcoming World Congress in Ballarat?

**Inspired by the possibility of organising the next World
Congress in 2002?**

ALARPM is looking for the group of committed enthusiasts who will take on the job of organising the next World Congress in 2002.

The charter for a World Congress is essentially:

- to create an international event which consciously seeks to attract a wide variety of participants including world leaders in relevant fields;
- to encourage sharing between practitioners, academics and others using action learning, action research and process management in the community, all educational sectors, business and government;
- to create a culture and spirit which encourages participation, reflection, networking and sharing;
- to work in partnership with the Participative Action Research (PAR) community and other movements or organisations with common interests;
- to ensure responsible financial management of the event so that member funds are protected and audit and fiduciary obligations are satisfied.

Challenges

It is not an easy task. Past experience shows that the organising group will work long hours with no financial reward. You will probably need resilience to endure criticism before, during and/or after the event.

Rewards

There will be rewards!! You will have the excitement and satisfaction of collecting together in your town a truly astounding bunch of academics, activists, business people, teachers and practitioners. They will learn, share, debate, contribute and shape an experience which will have a lasting impact on those who attend and, hopefully, on the world we live in.

Each Congress reflects the culture of its host venue as well as the passions and values of its organisers. You will be able to put your own special stamp on the proceedings. You will develop lasting friendships with people from all over the world.

Finances

Start-up funds are required. ALARPM is working towards a situation where each Congress covers its costs, repays seed funds provided and generates a surplus which provides the seed funds for the next Congress. ALARPM's capacity to fund the start-up costs for WC6 will depend on the financial outcome of the Congress in September. It may be that ALARPM and the organising group will need to establish a partnership with a local institution or organisation to assist with the seed funding (as has occurred for each Congress in the past). In any case, the role of the organising group needs to include obtaining financial sponsorship and financial management of Congress funds.

Location

Previous World Congresses have been held in Brisbane, Australia (1990), Brisbane, Australia (1992), Bath, England (1994), Cartagena, Colombia (1997) and the next Congress will be held in Ballarat, Victoria, Australia in 2000. We wish to see the venue move from country to country, continent to continent, although this will not be the sole determining factor.

Interested?

We would love to talk with any person or group who might be interested in the challenge and rewards of organising the next Congress. Discussion and negotiation is required to establish a collaboration between ALARPM and an organising group so that both of us can feel confident to proceed.

We have developed a more detailed statement of the factors which we would see as critical to the success of any organising group. This can be sent to anyone who might be interested in pursuing the possibilities.

Please make initial contact by phone or email as soon as possible and definitely by the end of June 2000. We would hope to make a decision by the end of August 2000 so that there can be a planned sharing of experience and learning at the next Congress in Ballarat in September.

For more information or to discuss possibilities, please contact Anne-Marie Carroll by phone 61-7-3399-5750 or email scope@uq.net.au.

Please bring this invitation to the attention of interested colleagues or contacts.

Networking

“Networking” is a regular feature in which we bring you news about communities involved in action learning and action research. There are many such communities around the world, some of them isolated from their immediate colleagues by their different interests. In the interests of bringing them closer together, we are inviting people to describe their local action learning/action research communities to you.

ALARPM email discussion list

ALARPM will be starting a new email discussion list soon. We will inform members about how to become part of the list via their email address. If you have a new email address or have changed your old address please advise us of the change so that you can be part of the discussion. We are interested in your views.

We invite people to submit reports of work-in-progress or information about completed projects - so that we can all become aware of the wide variety of options available to us.

Bookshelf

The WLDAS Model

- Rory Lane

In his recently published book *The WLDAS Model*, Rory Lane describes a multipurpose organisational model that is intended to promote creative and critical thinking in personal, professional and business applications.

The book may be especially useful for business managers, academics and professional consultants. Indeed, Bob Dick suggests,

“Rory Lane has produced an original, thoughtful and above all practical book on critical thinking and problem solving for organisational and individual improvement”.

The author's reflective style is evident in the title *The WLDAS Model* which is an acronym for the question “*What Language Do Angels Speak?*” This mix of practical and creative approaches continues throughout the book with items such as:

- **The Smoking Mind Program** (a seven-day self-improvement program);
- **The Eight Fountains at the WLDAS School** (an illustration of a balanced approach);
- **The WLDAS Wonders of the World** (a set of reflective questions);
- **Ordered Thought Diagrams** (a method of breaking down complex topics);

- **Thought Trains, Cognitive Planes and Automobilizers** (thought models);
- **People, Leaders and Messengers** (a method of self-categorisation);
- **The Rat Race Model of the Theory of Learning** (a rat on a tetrahedron in water);
- **The Principles of Snow White and the Seven Dwarfs** (an evaluation by poem).

The WLDAS Model promotes a balanced, people-focused approach to activities such as writing letters, developing business plans and critically analysing issues. Many serious topics are targeted. **The Goodwill Index** is a measure of goodwill for individuals and organisations and **The Democratic Cooperative** targets constitutional reform. A set of **Characteristics of Leadership** includes a reflective discussion paper that contains **The Roles and Responsibilities of a Staff Meeting Manager, A Framework for a National Sporting Body**, a parenting program **Minding the Children** and, examples of **Social Commentary by Poetry and Prose** using an organisational model for structure.

According to Dr Paul Wildman *The WLDAS Model* is a user-friendly model that has been “developed and embedded in Rory’s personal life and professional practice over the last three years”.

The WLDAS Model has been jointly published by Interchange, Prosperity Press and R C Lane. The cost is \$20.00 for ALARPM members and \$25.00 for non-members. It is available through ALARPM (see Publication order form) or contact the author at the following address.

Rory Lane
 43 Hartley St, Coolbellup, Perth WA
 Phone: 61-8-9337-4688
 Email: Rory.C.Lane@eddept.wa.edu.au

About the author

Rory Lane gave up a company car and an expense account in his mid twenties to study mathematics at the University of Queensland. In the following fifteen years he has been a teacher, Head of a Mathematics Department and Manager of Student Services in Senior High Schools in Western Australia. The combination of his interest in scientific analysis and social ethics led him to investigate processes and models of organisational philosophy.

A message from the author

The first edition of *The WLDAS Model* has been the outcome of a project that has involved many cycles of evaluation and improvement. Feedback in terms of editorial refinement, examples of applications of the use of the WLDAS Model, or a critical review of the book would be greatly appreciated and acknowledged in later editions.

Above all I hope anyone who reads *The WLDAS Model* finds it a useful and enjoyable experience.

**The WLDAS Model = creative thinking
+ organisational models
+ a balanced perspective
+ a people focus**

Benjamins - Book announcement

The following book announcement is from Paul Peranteau. Please reply to paul@benjamins.com with any queries, not to ALARPM.

Beyond Theory. Changing organizations through participation. TOULMIN, Stephen and Björn GUSTAVSEN (eds.) Dialogues on Work and Innovation 2.

90 272 1772 6 / NLG 96.00 (Paperback)

1 55619 826 4 / USD 47.95 (Paperback)

Action Research is one of the most practical and down-to-earth ways of doing research into working life. *Beyond Theory* draws on examples and actual cases to discuss action research within the framework of the modern, and postmodern, theory of science debate. While action research has been much criticized by the traditionalists, the book reflects a convergence between action research and positions emerging out of the critique of scientific traditionalism. Discussions between these two fields of knowledge, originally so very different, can enrich both. The book will be useful not only to researchers and academics but to anyone who is interested in the role and use of knowledge in social and organizational development.

Contributions by: Stephen Toulmin; Björn Gustavsen; Kjell Eriksson and Morten Hauger; Robert W. Putnam; Marianne Ekman Philips and Kerstin Rehnström; Annemieke J. Roobeek; Werner Fricke and Bernd Hofmaier; Per H. Engelstad; Oguz N. Babüroglu; Oyvind Palshaugen; Thomas McCarthy; Hans van Beinum, Claude Faucheux and René van der Vlist.

The End of Organization Theory? Language as a tool in action research and organizational development. With comments from Björn Gustavsen, Dag Østerberg (University of Oslo) and John Shotter (University of New Hampshire) Oyvind PÅLSHAUGEN (Work Research Institute, Oslo) Dialogues on Work and Innovation 5.

US & Canada: 1 55619 828 0 / USD 39.95 (Paperback)

Rest of world: 90 272 1774 2 / NLG 80.00 (Paperback)

Organizational theorists talk a lot about organizational development. Although they can express themselves eloquently, too often the practitioner is not convinced by their talk. The authors of *The End of Organization Theory?* are in favor of the 'doers' doing most of the talking themselves. Thus, in this book, Øyvind Pålshaugen tells the story of an action research project in which a reorganization of the discourse between management and workers serves as the basis for an organizational development process. Björn Gustavsen, Dag Østerberg and John Shotter add critical comments.

Action Research. From practice to writing in an international action research development program. Davydd J. GREENWOOD (Cornell University) (ed.) Dialogues on Work and Innovation 8.

US & Canada: 1 55619 832 9 / USD 39.95 (Paperback)

Rest of world: 90 272 1778 5 / NLG 80.00 (Paperback)

Supported bilaterally by Sweden and Norway, the Scandinavian Action Research Development Program (ACRES - Action Research in Scandinavia) emphasized conceptualizing research questions and self-conscious writing processes for experienced action researchers. Participants came from Norway, Sweden, Finland, Holland, Great Britain, and the United States. A learning experiment in the tradition of Scandinavian industrial democracy, ACRES had both intellectual and organizational tensions

common to action research projects. This book includes theoretical and historical overviews of action research, reflections on the writing process, narratives about the design and difficult internal processes of ACRES, and a selection of the participants' writings. A particularly unique feature of the book is the discussion of the problematic relationship between action research and conventional modes of research writing and an analysis of the complex social processes collaboratively managed projects create, in combination with a set of participant cases. Contributions by: Hans van Beinum; Morten Levin; Claude Faucheux; René van der Vlist; Davydd J. Greenwood; Siv Friis, John Puckett, Øystein Spjelkavik & Agneta Hansson; Kjell Eriksson; Ira Harkavy; Bertil Olsson; Ingrid Ljungberg van Beinum; Ann Martin; Henrik Dons Finsrud.

ALARPM is a strategic network of people interested or involved in using action learning or action research to generate collaborative learning, research and action to transform workplaces, schools, colleges, universities, communities, voluntary organisations, governments and businesses.

ALARPM's vision is that action learning and action research will be widely used and publicly shared by individuals and groups creating local and global change for the achievement of a more equitable, just, joyful, productive and sustainable society.

Guidelines for contributors

Contributions to this journal

Through the ALAR Journal, we aim to promote the study and practice of action learning and action research and to develop personal networking on a global basis.

We welcome contributions in the form of:

- articles (up to 10 A4 pages, double spaced)
- letters to the editor
- profiles of people (including yourself) engaged in action research or action learning
- project descriptions, including work in progress (maximum 1000 words)
- information about a local action research/action learning network
- items of interest (including conferences, seminars and new publications)
- book reviews
- report on a study or research trip
- comments on previous contributions

You are invited to base your writing style and approach on the material in this copy of the journal, and to keep all contributions brief. The journal is not a refereed publication, though submissions are subject to editorial review.

Contributed case study monographs

Contributions are welcomed to the Action Research Case Study (ARCS) monograph series. The case studies in this refereed series contribute to a theoretical and practical understanding of action research and action learning in applied settings. Typical length is in the range 8,000 to 12,000 words: about 40 typed A4 pages, double spaced.

Types of case studies include (but are not limited to):

- completed cases, successful and unsuccessful
- partial successes and failures
- work in progress
- within a single monograph, multiple case studies which illustrate important issues
- problematic issues in current cases

We are keen to develop a review and refereeing process which maintains quality. At the same time we wish to avoid the adversarial relationship that often occurs between intending contributors and referees. Our plan is for a series where contributors, editors, and referees enter into a collaborative process of mutual education.

We strongly encourage dual or multiple authorship. This may involve a combination of experienced and inexperienced practitioners, theoreticians, clients, and authors from different sectors or disciplines. Joint authors who disagree about some theoretical or practical point are urged to disclose their differences in their report. We would be pleased to see informed debate within a report.

You may have interesting case material but may be uncertain of its theoretical underpinning. If so, approach us. We may

offer joint authorship with an experienced collaborator to assist with the reflective phase of the report.

Another option is to submit a project report initially for the ALAR Journal (1000 words) with a view to developing the report into a full case study.

Detailed guidelines for case studies are available from the editor, ALAR Journal. The first case study in the series, by Vikki Uhlmann, is about the use of action research to develop a community consultation protocol.

The cost of *Consulting on a consultation protocol* is listed in the following Publication order form.

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The ALAR Journal can be obtained by joining the Action Learning, Action Research and Process Management (ALARPM) Association. Your membership subscription entitles you to copies of the ALAR Journal and a reduced price for Action Research Case Studies.

ALARPM membership also provides you with discounts on other publications (refer to attached Publication order form) special interest email networks, discounts on conference/seminar registrations, and a membership directory. The directory gives details of members in over twenty countries with information about interests and projects as well as contact details. The ALARPM membership application form is enclosed.

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Overseas subscriptions for ALARPM membership or the ALAR Journal can be paid by credit card (as indicated); payments by cheque, money order or bank draft should be in Australian dollars drawn on an Australian bank.



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		<i>Postcode</i>
<i>Town / City</i>	<i>State</i>	<i>Nation</i>
<i>Work contact numbers</i>	<i>Phone</i>	<i>Fax</i>
<i>Email</i>		

■ *My interests/projects relating to action learning, action research, process management are:*

■ *Do you wish to be linked with a world network of people with similar interest?* *Yes/No*

- | | | |
|---|---|--|
| <input type="checkbox"/> Action Learning | <input type="checkbox"/> Action Research | <input type="checkbox"/> Community Action |
| <input type="checkbox"/> Education | <input type="checkbox"/> Evaluation | <input type="checkbox"/> Gender Issues |
| <input type="checkbox"/> Higher Education | <input type="checkbox"/> Human Services Practice/Change | <input type="checkbox"/> Learning Organisations |
| <input type="checkbox"/> Manager & Leadership Development | <input type="checkbox"/> Method | <input type="checkbox"/> Organisational Change Development |
| <input type="checkbox"/> Process Management | <input type="checkbox"/> Quality Management | <input type="checkbox"/> Rural Community Development |
| <input type="checkbox"/> Social Justice | <input type="checkbox"/> Systems Methodologies | <input type="checkbox"/> Teacher Development |
| <input type="checkbox"/> Teacher Development - Higher Education | <input type="checkbox"/> Team Learning & Development | <input type="checkbox"/> Vocational Education |
| <input type="checkbox"/> Workplace Reform | <input type="checkbox"/> Other _____ | |

■ *This information will be included in our database and will appear in the annual network directory. Please complete payment details overleaf.*

To apply for ALARPM membership, which includes ALAR Journal subscription, please complete the information requested overleaf and the payment details below. You do not need to complete the ALAR Journal subscription form.

Payment Details

Category of subscription: A GST of 10% will be added to the following subscription rates after 01/07/00.

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\$85 AUD Full membership for people with mailing address *within* Australia

Mailing Address outside Australia

\$95 AUD Full membership for people with mailing address *outside* Australia

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\$45 AUD Concessional membership for people with a mailing address *within* or *outside* Australia. The concessional membership is intended to assist people, who for financial reasons, would be unable to afford the full membership rate (eg. full-time students, unwaged and underemployed people).

Method of payment:

Cheque/Bank Draft

Money Order

Visa/Bankcard/Mastercard (*please circle card type*)

Card No:

Cardholder's Name:

Cardholder's Signature: _____

Expiry Date: / /

Cheques, bank drafts or money orders can be made payable to ALARPM Association Inc. in Australian dollars. Please return application with payment details to:

ALARPM Association Inc.

PO Box 1748

Toowong Qld 4066 Australia

Phone: (61-7) 3345 7499

Fax: (61-7) 3273 5707

Email: alarpm@uq.net.au

