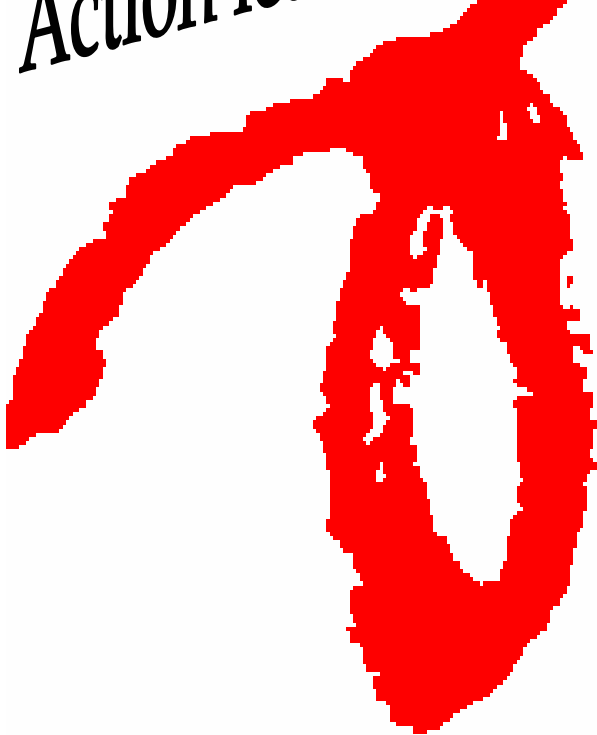


ALAR

Action learning and action research journal



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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, peaceful and sustainable society.

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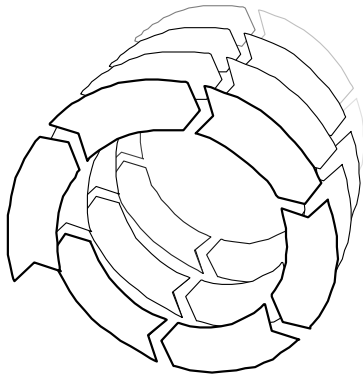
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Editorial

Welcome to the sixteenth issue of the ALAR Journal. This issue features four peer refereed papers that were presented at the *Surfing the Waves of Change* conference held in July 2003 at the new Tweed/Gold Coast Campus of Southern Cross University. The conference was a joint effort between ALARPM and Southern Cross Institute of Action Research (SCIAR). It featured a breadth of academic papers and interactive/experiential workshops focusing on the theme of sustainability in a variety of different applications using action research and action learning.

The four peer reviewed papers presented in this issue provide a number of perspectives. The first, by Kate Fisher, reflects on her experiences using emancipatory action research in collaboration with students studying economics in a TAFE context. In the second, Ian Hughes reviews a decade in the development of action inquiry at The University of New South Wales. Third, Anna Bloemhard explores 'not knowing' and 'being present in the moment' as personal inquiry tools. And last but not least, Linda Taylor documents the use of participative processes in a turbulent healthcare environment.

Also in this issue we present the ALARPM Annual Report, which includes reports from Yoland Wadsworth as President, Anne-Marie Carroll as outgoing Treasurer, and the Committee of Management, with some introductions and brief reflections on the Congress in Pretoria, South Africa. The next issue of the ALAR Journal will be a special Congress edition with a warm welcome to all new members who joined at the Congress (see page 43 for more details).

In 'Noticeboard' we bring you the latest on this year's activities and conferences including information on the ALARPM National conference, the NZARN conference, and a full calendar of events for SPIRAL. In addition, there is a call for papers for the new Sage-published *Action Research* journal that you must not miss!

**Activism in the face of
globalism: Lessons from
emancipatory action research
(the story of how a thoroughly
modern girl came to confront
postmodern realities)
Kath Fisher –**

Abstract

Globalisation in its many manifestations, often interpreted as a feature of the postmodern era, has presented challenges and opportunities for activists working for social change. The ideological dominance of free market economics, born out of neo-classical economic theory and supported by neo-liberal political philosophies, presents a particular challenge to such activism. As an educator trained in economics, the author undertook emancipatory action research with students studying economics in a non-mainstream context. The reflexivity inherent within the action research process led to insights that may contribute to a more effective activist response in a postmodern world.

Introduction

The phenomenon of globalisation, however it is conceived or framed, can be interpreted as but one manifestation of the increasing dominance of a particular ideology that has held sway over Western governments and institutions since the 1980s. This is the ideology of free market economics, born out of classical and neo-classical economic theory and supported by neo-liberal political philosophies (Theobald 1997). Its dominance has also been apparent at national

levels through the movement towards privatisation of public assets; deregulation of financial markets; corporatisation of services such as education, health and welfare; and the penetration of the language of economics into almost every sphere of decision making (Argyrous & Stilwell 1996; Rees & Rodley 1995).

At the international economic level, free market ideology has seen increasing dominance of multinational companies, export-oriented growth, unregulated capital flows and priority given to price stability in global macroeconomic policies. These processes, while offering economic prosperity for industrialised nations, multinational corporations and wealthy individuals, have been accompanied by social injustice and environmental problems on an unprecedented global scale (Max-Neef, Elizalde & Hopenhayn 1987). At the political level, some have argued that the stance taken by US-led coalition forces against Iraq was partly an outcome of this global imbalance (Vidal 2002).

Activists wanting to challenge such imbalance have been flummoxed by the lack of political participation and apathy that has been evident in the face of globalisation and the apparent lack of real challenge to the dominance of free market ideology. Taking on such an elusive and indefinable 'foe' has brought unprecedented challenges to traditional left politics (Magnusson 1996). However, a new social movement opposed to globalisation, and supporting the revival of civil society, cultural identity and local economies, has emerged in the wake of protests against institutions such as the World Trade Organisation, World Bank and International Monetary Fund that began with the street demonstrations in Seattle in December 1999. The movement has employed strategies that have ironically arisen from the globalisation of communications, subsequently adopted very successfully by an international peace movement strongly identified with anti-globalisation protest.

Proponents such as Barlow and Clarke (2001) claim the 'civil society' movement is a 21st-century phenomenon, superseding the 20th-century focus on social movements associated with marginalised groups and 'identity politics'. They claim it collapses traditional left-right political divisions and presents a turning point in social activism. While such activism is to be applauded as an apparent contradiction to the apparent passivity and mute acceptance that had previously characterised community response to the globalisation juggernaut, assumptions of righteousness permeate activist rhetoric, and opportunities for self-reflection and self-critique are lost in the urgency to rally people to the cause. As an activist myself, I have come to question much of the non-reflective rhetoric of this activism through reflection on my own activist practice, grounded in action research in a radical teaching of economics in tertiary institutions.

In this paper I will not be focusing on the debates about globalisation and the dominance of economic rationalism. Rather, I examine how through the reflexivity made possible by critical or emancipatory action research, I came to question the ontological foundations of critical social science (underpinning critical action research) that informed my teaching practice and research. This reflexivity produced a reflection on what activism is possible in the postmodern era (if that is what we are in) given the problematic interpretations of 'empowerment' and 'emancipation' that have been employed by activists and critical theorists.

Through this process of reflexivity, I attempt to navigate a path through and beyond the postmodern, informed by approaches such as Heart Politics (Peavey 1986, 2000), towards a more 'holistic reflexivity' (Bleakley 1999) incorporating an ethical, engaged agency rather than a more 'rational' separate and personal agency. Such ethical agency may allow us to experience the world in relationship, free of materialist desire, valuing the building of communities through connectedness with others and the environment.

Further, I demonstrate that the reflexivity central to action research produces the grounds for critique of its own practice, making it an 'alive' and relevant methodology, with an in-built capacity for its own transformation.

The paper begins with an outline of the motivations for the emancipatory research undertaken with TAFE students studying economics in 1996. I then go on to demonstrate how I applied critical action research methodology in this context, leading to a number of 'levels' of reflection. The critical reflexivity that resulted led to reflection on the possibilities of a more reflective activist focus in the postmodern era.

Site of activism: demystifying economics for empowerment

My original research goals were to develop an empowering curriculum for teaching economics, to demystify the orthodoxy that has come to dominate the discipline and to introduce alternative ways of thinking about economic issues that affect everyday lives. My motivation for undertaking the research was grounded in my strong (admittedly polemical) conviction that unless economics was better understood and demystified, the alienation and powerlessness felt in the face of larger forces such as globalisation, legitimised by free trade and market rhetoric, would continue to paralyse citizens and activists alike. I was inspired by the work of the great radical popular educators – Paulo Freire (1973; 1985), Ira Shor (1978; 1987; 1992), Jane Thompson (1980; 1983; 1988), Tom Lovett (Lovett 1980, 1988; Lovett, Clarke & Kilmurray 1983) – all passionate about empowerment and emancipation of people marginalised by the seemingly unforgiving march of global capitalism. Outside the institutions, popular educators such as Miles Horton use Freirian processes to take economics to the people (Barry & Dougherty 1997; Highlander Research and Education Center 1997). The model of radical and

popular education provided the inspiration for my educational aspirations.

The social change movement known as Heart Politics (Macy 1983, 1991; Peavey 1986, 2000) was another significant influence on my pedagogical approach. The roots of the Heart Politics philosophy and practice are in the non-violence movement and Buddhism, which both recognise the interconnectedness between humanity and other forms of life. The twin values of respect for life and resistance to injustice form the basis of the non-violent attitude to social change. The core strategy that underpins Heart Politics activism is relationship building, particularly at the local level. Processes such as non-violent action, deep listening, sharing vulnerabilities and strategic questioning (Peavey 1994) are aimed at building relationships not only with allies, but also with those from 'the opposition'. The challenge was how to incorporate principles from popular education and Heart Politics, both developed in community and grass-roots contexts, into an institutional setting to accomplish my educational goals.

Feminists and economists in the institutional tradition (Hodgson 1998) offer the strongest evidence of providing empowering curricula for students studying economics within educational institutions (Lewis 1995; Shackleford 1992). They also offer a strong critique of conventional teaching of economics within universities – its pedagogy lacks active and critical engagement with economic theories; it fails to make contemporary economic issues the focus of analysis; it uses inappropriate reductionist methodologies; and it defines economics solely within a narrow and orthodox neo-classical framework (the basis of free market theories). Through incorporating student experiences, situating content in the real world of contemporary economic issues, using frameworks that incorporate values and habits and using an institutionalist definition of economics, it is possible to 'create a site of social action in which our students learn how to use economics to engage

the world as informed, critical citizens' (Lewis 1995, p. 564). Marginalisation of such approaches from mainstream economics means that conventional economics teaching is unlikely to shift in response to their critique. The rise of the recent 'Post-Autistic Economics' movement provides an indication of the depth of student feeling about how they are being taught economics in France, the UK and the US (Feiner 2002).

The context of my own institutional teaching was outside conventional teaching of economics within commerce and business schools. I had the opportunity to teach economics to students studying Community Welfare at TAFE in 1996 and to students studying social science at Southern Cross University in 1998 and 1999. In each context I had freedom to devise my own curriculum and was thus not constrained by having to conform to teaching orthodox economics. From the outset, I employed action research methodology, with each teaching experience forming large cycles within which smaller cycles were embedded. It is beyond the scope of this paper to explore the entire dimension of this large research project, and I confine my discussion to the research within the TAFE context and the reflective processes it generated.

Applying principles of emancipatory action research

Given my particular activist focus, the logical methodology to employ emerged as critical (or emancipatory) action research, particularly as articulated by Carr and Kemmis (1986) in the field of education. Critical action research involves a commitment to political action by acting on the radical critique of current social and political conditions to gain understanding and improve those conditions. It is underpinned by the ontology of critical social science (Fay 1987), with all its attendant values of empowerment through demystifying dominant ideologies, liberation and social change. Unlike other paradigms of research, critical action research makes its values and political intentions clear and

transparent from the outset. In summary, the principles of critical action research as articulated by theorists such as Carr and Kemmis (1986), Grundy (1982) and McTaggart (1991) encompass:

1. engaging in the Lewinian self-reflective cycle (plan/act/observe/reflect);
2. promoting critical consciousness through critical self-reflection;
3. identifying practice as central to research;
4. engaging in committed activism;
5. offering rational alternatives;
6. involving a collaborative critical community; and
7. developing theory.

Reflection is central to action research, whether or not the researcher has emancipatory intentions. It is this very process of reflection that I want to explicate and explore for the purposes of this paper. This particular action research context, that of teaching an empowering curriculum to two groups of TAFE students (one full-time and one part-time) who had no previous experience of (and a deal of anxiety about) learning economics, produced four different levels of reflection, two within the site of action research (classroom teaching), and two following the teaching experience. These four levels are articulated in the next section.

Four levels of reflection

1. Reflection as required by the action research process

Cycles of plan/act/observe/reflect were iterated each week during the TAFE semester. I had chosen a friend and colleague to be a critical friend – she was an experienced adult educator, understood the dynamics of power relations in the classroom and was willing to challenge my

assumptions thoughtfully and supportively. Thus, I engaged in a reflective process from the outset. For example, in the first class, after asking the students how they felt about learning economics and what they understood economics to be about, I invited them to be collaborators in the project of developing an empowering curriculum. After they responded positively, I wrote reflections based on that experience in the classroom, my enthusiasm being very apparent:

I felt extremely elated after the two classes, as it seemed my dream of tackling this challenge of writing a radical curriculum for economics in an empowering context for learners was to be realised. I also feel extremely appreciative of my students whose generosity in being prepared to embark on this journey with me seems exceptional. I am also aware that they have much to gain from the process as well: many of them have expressed a deep desire to understand the mysteries of this alienating subject, as well as looking forward to a break from the familiar format of learning within the TAFE institutional context. I expect they feel they have nothing to lose. I also get the feedback that my enthusiasm is infectious – could it be possible that they are being unconsciously manipulated?

As well as the immediate emotional response, I reflected more deeply on the process I was embarking on after consultation with my critical friend:

Through this experience of critical reflection I realised that I needed to be aware of my particular role in this situation, and that I was in a position of power in relation to the students, particularly as I was assessing them. I was the person with the knowledge and institutional power – in this way I could never be seen to be an ‘equal’ collaborator with the students.

Given my understandings of collaborative action research, I wrote up my reflections in some detail and handed them out

to the students the following week. Figure 1 demonstrates this application of reflection within the action research spiral.

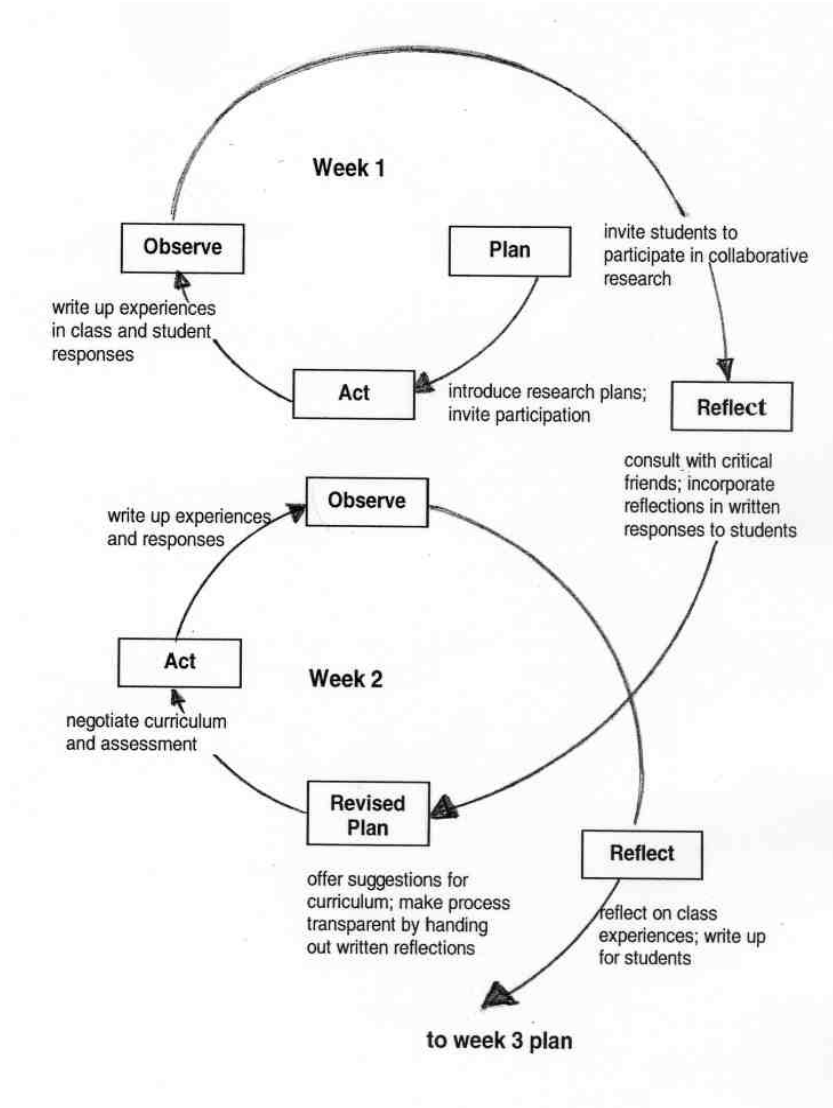


Figure 1: Reflection within the action research spiral applied at TAFE

2. Reflective exchange

During the third week of classes one student in the part-time group (always the more engaged and enthusiastic about the research process) asked a very perceptive question about how this process of reflection that we were all engaged in could be made conscious and ongoing, rather than relying solely on a write-up at the end of the semester which would

not allow for ongoing feedback and transformation. This led to the suggestion that at the beginning of each class we could hear reflections from the previous week, as it was thought this might produce insights about how the learning process could be improved. This proposal was taken up and produced what I consider to be a second level of reflection, that of a 'reflective exchange' between teacher and students.

Thus, at the instigation of the students as collaborators in the research, we engaged in a reflective exchange that took the following form: I would write up what happened in the class in terms of the content covered and the process we engaged in. I would also write my understanding of what I had heard in the reflections that each student articulated at the beginning of the class (reflections on both process and content) and my reflections on their comments. I would also write a summary of the content covered in the class and my thinking about how to tackle the next topic and what I thought should be covered next. These writings would be handed out to the students in the following week and they would then become the basis of further reflection.

The following gives a flavour of how this reflective exchange, part of a process of 'cogenerative learning' (Elden & Levin 1991), operated. In this example I was responding to anxiety expressed by the full-time group [these are extracts from reflections handed to the class in Week 5]:

The opportunity to take more control of learning and assessment seems to have produced a deal of anxiety for this group. The feelings of empowerment are not readily apparent, as many feel they 'do not know enough'. For this class, empowerment may be more realisable in hindsight, rather than in the present, which is dominated by concern about being able to handle the tasks... This produces a strong conflict within me as well: I do not feel like a 'real' teacher unless I am out the front 'imparting knowledge' ... And yet I know (as do the students as well) that this is not an effective way to promote learning, and especially is not an empowering way to learn. Struggling with this dynamic is

keeping the research process very much alive within the class – it is certainly producing the most response.

In response to a request for comments, Aaron pointed out that anyone reading this needed to understand the conditions under which the students were studying welfare. The high workload of eight subjects meant that students were under constant pressure with assessment deadlines, and they were therefore necessarily very task focused. ... Sue picked up from these comments, and talked about her concern that process was 'eating into class time', given the amount of work that had to be covered. She felt that content was being sacrificed for process ...

I found this discussion very interesting, and would have loved to explore it further, as it seemed to be getting to the heart of the education process that the students have come to accept. I think one of the problems involved in this high-pressure full-time approach to the Welfare course is that students do not really feel they can afford time for reflection on what is happening and how they are actually learning. They do not have time to critique the conditions under which they are working. It reminds me of the conditions workers experience under capitalism – as long as they are flat out working to survive, they are not going to have the time or energy to reflect on their conditions and question the structures they are labouring under.

As far as conducting emancipatory action research within a classroom context is concerned, I would argue that, as teacher and researcher, I applied the principles of such research through:

- handing over 'power' to the students to decide on how they wanted to be assessed and what material they wanted covered in the course;
- refusing to see myself as an 'expert' in the field, but more as a 'learning facilitator' and 'information gatekeeper';
- incorporating reflection on learning as a conscious process throughout;

- engaging in critical reflection on my own assumptions and practices; and
- building an iterative reflective exchange built on trust and honesty which helped make visible what is usually invisible in classroom power relations.

After completion of this cycle of research at TAFE, I engaged in two more reflective processes, more in the spirit of 'meta-reflection', that called into question both my previously unexamined assumptions and the assumptions underlying emancipatory action research itself, assumptions that lie at the heart of much social activism.

3. Meta-reflection on assumptions of teaching/research approach

When I reflected on how I conducted the research at TAFE, I became more aware of the assumptions I took unconsciously into the research domain. I discovered that these assumptions were deeply embedded in my activism and teaching. Firstly, I made a number of assumptions about economics that demonstrated the impact of critical theory (Bronner & Kellner 1989; Habermas 1972, 1984) on my thinking, such as: conventional Western economics is an ideology whose language is alienating and mystifying; when the ideology of orthodox economics is presented as 'this is how the world works', it leads to unthinking/unconscious acceptance of its premises and conclusions; and that this acceptance prevents an imagining of alternatives and constitutes a threat to genuine democracy.

Secondly, I made a number of assumptions that reflect the ontology of the educative project that is central to critical social science (Fay 1987), also referred to as 'the emancipatory project', such as: action to change this state of affairs involves demystifying the language of economics and uncovering the real sources of power that underlie it; and this can occur through a participatory educative process that empowers learners.

An important realisation was identifying a pivotal assumption that *it is important for me to act* in some way for the common good, that my work must have such an activist intention. Exploring the influences that helped to construct my activist identity became central to this reflective process on my assumptions, and assisted me to enter into a deeper level of reflection on my collaborative research and reflections with the TAFE students, what I call a 'critical reflexivity'.

4. Meta-reflection on reflective exchange in the classroom: a critical reflexivity

Undertaking a meta-reflection on the way I conducted my reflective practice with the TAFE students led me to critically examine and reflect on the underlying assumptions, contradictions, absences and illusions evident within that practice. Such reflection revealed an activist not necessarily aware of some of the ontological and epistemological dilemmas posed by her positionings on empowerment and activism, and noted the inevitability of her own complicity in a possible manipulation of her audience in the name of liberation, dilemmas identified in Fay's (1987) analysis.

This deconstruction revealed a tendency to make unaware assumptions about the sources of student empowerment and enthusiasm, about an imperative to take action in the world; about the inevitability of empowerment and about what an empowering education looks like. It uncovered illusions about collaboration in a context of unequal power and differential access to knowledge, and about 'democratic' practices which failed to offer genuine opportunities for dissent and which failed to confront expressed scepticism. It pointed out significant absences in relation to a lack of critique of alternative visions, a lack of critique of emancipatory discourse and a lack of appreciation of the fluidity of power relations. It noted contradictions in relation to taking on the role of 'expert' and demonstrated the tensions involved from the conflicting roles that are often

taken in emancipatory action: that of being an agent of change *and* an agent of control (Healy & Peile 1995). To illustrate, the following are examples of my reflexive responses to the reflections given in earlier extracts.

In response to my 'elation' expressed after the first week and the concern about manipulation:

I was aware of some discomfort at the time about imposing my agenda. I was also aware of the power dynamics present in the classroom. The fact that I was prepared to share these discomforts with the students indicates my willingness to model critical reflection, even if I was unlikely to be swayed from my path. I was determined to convince them that this would be a good thing to do, such was my conviction of the 'rightness' of the cause.

In response to the reflective exchange with the full-time students that attempted to speculate about when empowerment would happen:

There is an assumption that empowerment will happen, even if it be 'realisable in hindsight' ... I was not willing to see that uncomfortable experiences can be indicators of change as much as enjoyable ones. It also reveals my own assumptions about what empowerment looks like, despite not making these explicit.

And later in response to their concerns about their learning:

While I still believe there is some accuracy in this critique of the students' conditions, the ideological nature of my interpretation is evident. It was in my interests to view the students as an oppressed group to explain their resistance. From my position I could not see that this resistance could have another explanation, or that students have power and exercise it in particular ways – it seems the critical theorist lens provided the only story in town. This reflection also reveals one of the dilemmas of incorporating critical reflection into the learning process – it takes time, and does

not always lend itself to the high-pressured environment of institutionalised learning...

In commenting on the 'irony' of a class clamouring for content in the midst of struggling with the process, I appeared to ignore the possibility that resistance can be evidence of a power struggle...

It is interesting that my interpretations of this class's resistance to collaborative assessment negotiations centred on their workload and inexperience of TAFE. I was not so prepared to consider that their resistance might have to do with other factors, such as wariness about being manipulated in the guise of liberatory promise.

This multi-layered experience of critical reflection and reflexivity demonstrates the depth and potential for deep inquiry that action research can produce, a potential that may not always be readily apparent by a simple interpretation of the familiar plan/act/observe/reflect process.

Making sense of uncomfortable realities: the postmodern critique

As a critical educator committed to emancipation and empowerment of my students, I found that the process of critical reflexivity called into question the assumptions underpinning my role as 'change agent'. I found myself having to confront uncomfortable realities and discovered that such a confrontation was similar to the critique of the emancipatory project made by postmodern writers (Lyotard 1984; Rosenau 1992; Usher, Bryant & Johnston 1997; Usher & Edwards 1994). It is beyond the scope of this paper to discuss this critique in the depth it deserves, but, in summary, postmodernist writers challenge 'grand narratives' such as the notions of 'progress', 'liberation' and 'empowerment', as well as attachment to hopes for a better world and the idea that change is possible through political action, so

fundamental to the type of emancipatory pedagogy I was wedded to in my own teaching practice.

Such criticisms have produced dilemmas for critical educators who have not been able to ignore the postmodern perspective on the emancipatory project and its ontological foundations. For instance, Kemmis (1996) argues that while the postmodern critique needs to be taken seriously, our emancipatory intentions need to be maintained, given the necessity for the continuance of political struggle in the face of unrelenting injustice. He calls for a 'remaking' of the emancipatory project, arguing for improved social practices of education that will 'engage, challenge and develop people's ... practical understanding and interpretations of their circumstances' (Kemmis 1996, p. 233). Kemmis argues that the remaking of the emancipatory project depends on communicative relationships, collaboration and engagement in social movements.

Implications for activism

Despite the dilemmas associated with assuming the role of change agent within an emancipatory framework, the research at TAFE (and later at university) demonstrated the value of bringing emancipatory processes into the teaching of economics. It showed that demystifying economics with an emancipatory intention is important for students to gain a sense of how the discourse of economics and the power of that discourse affect their everyday lives. Students moved from alienated and disempowered positioning in relation to economics to positions that permitted them to believe they could debate, critique and engage with the 'no choice' rhetoric they were confronted with daily in media representations of economic realities.

Another outcome of the research was the significance of the reflective relationship that was established in the classroom. Being willing to listen to the students' personal and academic concerns, sharing my own doubts and

uncertainties, engaging in a mutual reflective exchange, giving each person a chance to be heard all demonstrated the influence of the Heart Politics approach, discussed earlier. A move to reflexivity may offer a productive direction for activists, not only educational activists but also activists in community and grass roots contexts. I suggest that the perspectives offered by Heart Politics have much to offer this direction, particularly the emphasis on building relationships, listening deeply and strategic questioning aimed at creative movement from fixed positions.

My experience of being involved in grass roots activist discussions around globalisation, combined with reflecting on the implications of my research with a critical friend (Lyn Carson) helped me identify what was missing in much activist practice. Bill Moyer (1990; 2001), a veteran grass roots activist, developed a model of social movements that incorporated a typology of essential roles that activists play: the citizen, the rebel, the change agent and the reformer. The citizen role involves being active as a 'good citizen' who supports the values, traditions and symbols of society that support basic human rights, dignity and freedoms. The main role of the rebel is to say no to violations of primary values and principles and she or he generally uses such means as direct non-violent action, mass rallies, boycotts, blockades, leafleting and civil disobedience. The change agent educates the public about existing conditions and policies, participates in dialogue with those in power, creates opportunities for democratic processes that permit exchanges of opinions, promotes alternatives and involves the whole society in the long process of social change. The purpose of the reformer is to have the movement's goals and alternatives officially incorporated into the laws and policies of society's economic, social and political institutions.

Extending Moyer's (1990; 2001) model beyond the four roles of rebel, reformer, change agent and citizen, there could be a fifth role of activism, that of the 'reflexive inquirer'. Such a role would be to assist deeper reflection, with no agenda

other than to explore, to understand, to reveal deeper meanings. The skill of the reflexive inquirer would be to maintain openness to possibility, similar to that offered by strategic questioning (Peavey 1994). Through compassionate questioning, where the questioner 'stands beside' the one she questions, without the desire to see her 'recipient' move in any particular direction, but with a genuine desire to see an end to suffering, possibilities for freedom open up¹.

The reflexive inquirer may be able to transform the trajectory of much activist rhetoric and dialogue, creating a space for new possibilities, allowing an environment of 'dynamic interactivity' that allows democracy to 'break out' (Blaug 1999), a place where more profound and meaningful change could occur. The implications of this for educational activists, Moyer's (1990; 2001) 'change agents', is that taking on the role of reflexive inquirer may be a productive approach in our goal of educating 'critical citizens' (Aronowitz & Giroux 1991). Part of this reflexivity would necessarily involve a questioning of our 'expert' positioning as gatekeepers of knowledge.

It seems to me that further investigation through action research of the role of the 'reflexive inquirer' in both educational and community settings offer an exciting opportunity to explore the potential of such a productive direction for activism. In addition, an exploration of more creative options such as theatre, community writing and street performance for taking alternative understandings of economics and its role in globalisation into the community may offer productive contexts for the application of reflexive inquiry. Activism informed by such principles may well offer empowerment of a very different kind – the freedom to experience the world free of materialist desire, valuing the

¹ Carson presented a version of this idea in a paper presented to a conference on social activism and education (Carson 2000).

building of communities through connectedness with others and the environment.

Finally, in praise of action research ...

Action research demands an incorporation of reflection by all participants in its process. It was this reflective focus that permitted a reflective exchange with the TAFE students, produced reflexivity on my own emancipatory aspirations and produced a deeper appreciation of the potential for reflexivity in social change activism. My own process of reflection, enhanced by collaboration with peers skilled in reflective questioning and inquiry informed my teaching practice throughout the research. I came to understand, through praxis, what it actually means to be a 'reflective practitioner'.

While critical action research is firmly located in a paradigm where 'action' is central, and its emancipatory intentions are transparent, its inherent reflexivity produces the grounds for critique of its own practice. It is therefore a methodology which has the potential to transform itself, through questioning of its fundamental assumptions, ontology and epistemology. I would maintain, therefore, that the main contribution made by action research is its commitment to continual cycles of reflection, particularly when that reflection is conducted within the context of relationship.

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Confronting the gaps: Does a decade of action research prepare us for sustainable development in the future?

- Ian Hughes

Dialogue among people is necessary to promote mutual trust. It leads to better understanding and to peace and harmony (Dalai Lama).

This paper will review a decade of development of action inquiry at The University of Sydney, in the context of global agendas for sustainable development. It will seek to identify gaps between our current performance and what is needed for sustainable development in the future.

In the last decade, the importance of action inquiry into sustainable development and global justice has been recognised. The Bruntland Report defined sustainable development as 'development that meets the needs of the present without compromising the ability of future generations to meet their own needs' (World Commission on Environment and Development 1987: 43). The United Nations Millennium Declaration (General Assembly 2000) established eight development goals, concerning poverty, education, gender equality, child mortality, maternal health, diseases, environmental sustainability and global partnership for development (World Bank Group 2000). About ten years ago dissatisfaction with GDP as a sole indicator of development led the World Bank to thoroughly review its approach to development. The 1999 World Development Report proposed that we 'look at the problems of development in a new way - from the perspective of

knowledge (World Bank 1999: 1). Unequal access to information is a key factor in the problems underlying all eight world development goals, and the World Bank recognises a key role for action research in knowledge development (World Bank Group 2000). Are our Universities ready to meet this challenge?

Action researchers are familiar with the critiques of normal science upholding empirical positivism. There is no need for me to rehearse those arguments here. In the frame of reference of normal science, 'research is a rigorous, systematic inquiry or investigation, and its purpose is to validate and/or refine existing knowledge and to generate new knowledge (Axford et al. 1999). Within this framework, action research can be seen as a form of applied research that has its origins in ideals of empowerment, equality and holistic thinking (Owens et al. 1999). Action research is a kind of research with specific characteristics. These include the twin purposes of extending knowledge and acting to solve practical problems; emphasis on local knowledge and specific solutions; and commitment to social justice. Action researchers use a range of methods for data collection and analysis. From the perspective of normal science, action research can be viewed as a way to conduct scientific inquiry (a methodology) while at the same time working to solve practical problems or produce positive social change. The Knowledge for Development (K4D) model, widely adopted in North and Central Africa, uses research to identify avenues for development action, followed by action informed by local tacit and explicit knowledge (Knowledge for Economic Development Team 2002). Bob Dick says that action research is action and research in a single process (Dick 2001).

The development of Action Research On Web (AROW) at The University of Sydney has been managed in annual cycles (Hughes 2001). After ten cycles and more than a hundred action inquiry projects, it is appropriate to observe developments, reflect on achievements, strengths and

weaknesses, and plan for the next meta-cycle. This article presents a statistical overview of the first decade, followed by discussion of qualitative gaps uncovered.

Action inquiry began with a series of undergraduate action oriented participatory community studies, started in 1993. In 1996, the first Action Research On Web (AROW) course was offered. By 2002, AROW developed into an integrated service, combining the four main functions of the University: teaching and learning, research, service to the University, and service to the community. The development and management of AROW is itself a long-term developmental action inquiry (Torbert 2001) project.

The motivation for introducing action inquiry to the Faculty of Health Sciences came from a commitment to social justice, and a conviction that action research embodies the basic social action of helping each other. Along with Pat Maguire, I see action research as ‘one tool in the multifaceted struggles for a more just, loving world’ (Reason and Bradbury 2001b). Since 1997, I have followed David Tripp’s usage of ‘action inquiry’ as an umbrella term for a number of related technologies including action research, action learning, continuous improvement, and others (Tripp 2003). William Torbert describes the approach as ‘developmental action inquiry’ (Torbert 2000) in which it is possible for action, research, learning, practice, and improvement to be combined. Action inquiry is a practice inspired by a sense that all our actions can be inquiries; all our inquiries are actions; and we can always be learning through reflection (Torbert 2001). In developmental action inquiry we can simultaneously learn about a developing situation, accomplish tasks, and redefine tasks or processes as necessary. Learning is tested in the situation against the outcomes of activity (Fisher et al. 2000; Pang et al. 2002). The key test of validity is not whether findings adhere to a set of academic rules, but whether they work in the field. This conjunction of action and research is difficult for highly specialized professions to grasp.

Data

Data for this study is gathered from records kept of 173 action inquiry projects conducted in the decade from 1993 to 2002. Achievements include approximately 100 limited circulation reports, 17 on-line journal articles, two articles in peer reviewed scientific journals, one on-line book and two chapters in other academic books and 15 on-line learning modules. AROW has won no external competitive research grants.

AROW offers an action learning elective stream for Improving Health Systems, as well as subjects in action research, evaluation, Internet research, and reflective practice, and has provided non-award courses. AROW provides free access to an on-line journal, *Action Research e-Reports*, an on-line course text, the *Action Research Electronic Reader* and other resources.

From 1993 to 2002, 173 action inquiry projects were facilitated. The distribution of projects in each year is shown in Figure 1. AROW projects have not been evenly distributed across the years. There was an upward trend from 1993 to 1997, then a drop to almost zero in 1998, when AROW was moved from one School within the Faculty to another. The graph illustrates the vulnerability of AROW, an issue taken up in discussion below.

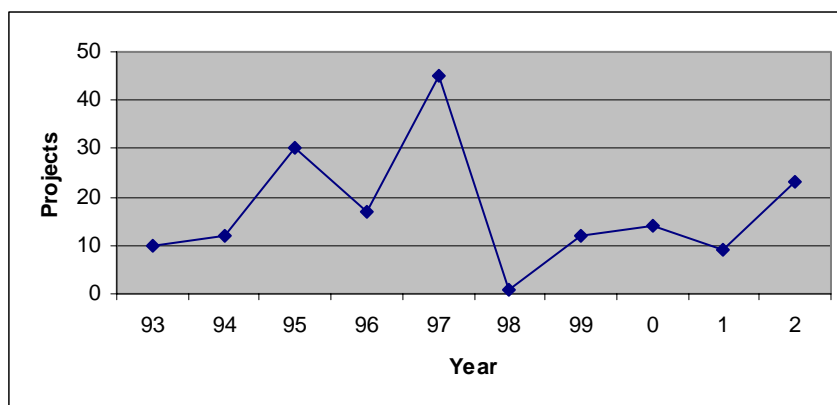


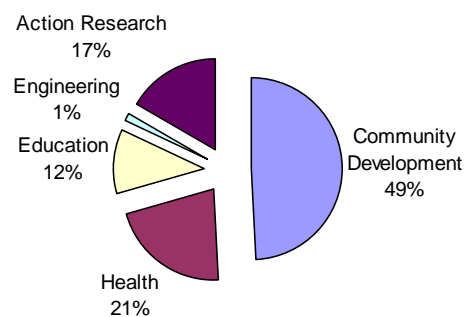
Figure 1: Projects each year, 1993-2002

The cross-disciplinary nature of action research and inquiry is reflected in the range of topics, shown in Table 1. The professional field categories are rather loosely defined. Many projects span more than one category and the decision to place a project in a category may be arbitrary. A community based health education program, for example, could be placed in one of three categories. Community action projects include participatory community profiles, community action plans and community development projects. Many of these were undertaken by Undergraduate students working in Aboriginal Community Health settings. They were often participatory projects undertaken in collaboration with community-based organisations. Health projects include a range of professions and interests.

Table 1: Projects by professional field

Professional field	Projects
Community Development	85
Health	37
Education	20
Engineering	2
Action Research	29
Total	173

Figure 2: Projects by professional field



About half the projects were categorised as community development. Among the 85 projects in this category, five planning projects were counted as again when they were implemented the following year. If these were classified as

single projects running for two years (as extended action research projects are), the number of community development projects would fall from 85 to 80 (and the total number of projects from 173 to 168).

Only about one-fifth of projects were categorised as health projects, however most of the community development projects included specific attention to health issues. Some of the inquiries into action research, and all except one of the education projects, were framed in the context of health professions. About 12% of the projects concerned the education of health professionals, or other aspects of education. Patient education projects are not included in this category. The AROW project, which itself is a long-term action inquiry project, is included here.

Action research is not a profession, but a cross-disciplinary and multi-professional activity. The action research category was used for projects in which the primary emphasis was on action research or action inquiry approaches, processes or methods.

The division between undergraduate and postgraduate projects is roughly equal (see Table 2). Postgraduate research projects continuing over several years are counted once, while coursework is structured as an independent project each year. If extended research and coursework projects were counted in the same way, the proportion of postgraduate projects would be slightly more than half of all projects.

Table 2: Level of enrolment

Level	Number
Undergraduate projects	92 (53%)
Postgraduate projects	81 (47%)
Total	173 (100%)

Continuing professional education students with recognised professional qualifications who are not enrolled in a University award program are included in the 'postgraduate' category, along with students enrolled in postgraduate coursework and research award programs.

The categorisation of project by type in Figure 3 reflects administrative arrangements. Community development students completed a community profile, a plan and a community action (CD) project in the first, second and third year of the Bachelor degree program. Most of these are participatory projects. Continuing Professional Education projects were completed by students not enrolled in award programs. Most of these are workplace projects, often using action research to improve health systems or services. More than half of these projects were directly supported by employers. Elective study projects were completed by students undertaking an action inquiry project as an elective towards a postgraduate coursework degree. Six students have undertaken action research theses towards Doctor of Health Science or Doctor of Philosophy degrees. Research and development projects are undertaken by staff to improve the systems or services in the Faculty or School.

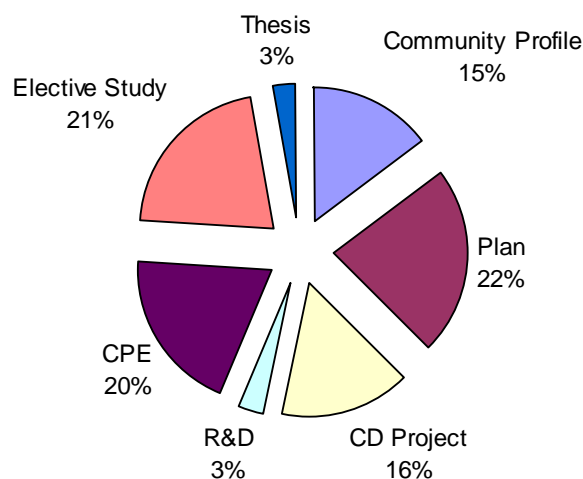


Figure 3: Type of project

The state or country in which students lived and worked on projects is listed in Table 3. AROW has provided on-line facilitation for action inquiry projects in twelve different countries, and has facilitated face-to-face learning sets in Australia, Cameroon and Singapore, as well as on-line learning sets. AROW provides on-line learning resources used by other institutions in Australia, Cameroon, Canada, Finland, India, Indonesia, Japan, New Zealand, Nigeria, Rwanda, Singapore, South Africa, Taiwan, Tanzania, United Kingdom, and USA, and have entered into collaborative agreements with organisations in Australia, Burkina Faso, Cameroon, Germany and Singapore. Fifteen action learning projects were completed in Singapore through learning sets facilitated by MaLAR (Management Learning and Action Research), and 21 projects in African countries (excluding South Africa) were supported by workshops conducted by Centre International de Formation Recherche Action Sciences (CIFRA), Burkina Faso in collaboration with Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ), Germany.

Ten projects were still in progress at the end of 2002. Of the 163 completed projects, 154 resulted in reports with limited circulation. Though an accurate count is not available, I estimate that more than 100 of these are available on the public record. Many were lodged in local libraries or circulated through community organisations. Twelve reports were published in the on-line journal Action Research e-Reports (Hughes 2003).

Table 3: Projects by location

State or Country	
New South Wales	122
Queensland	3
Australian Capital Territory	1
South Australia	1
Tasmania	1
Cameroon	15
Canada	1
Finland	1
India	1
New Zealand	4
Nigeria	3
Rwanda	1
Singapore	15
South Africa	1
Tanzania	2
United States of America	1
Total	173

Table 4: Projects by outcome

Outcome	
In progress	10
Not recorded	9
Plan	39
Profile	26
Proposal	5
Published paper	12
Report	72
Total	173

The statistical overview indicates the scope and scale of the AROW program, but provides little information on its quality or significance. In the School and Faculty AROW has been a source of innovation, capacity building, organisational learning and income generation. AROW has

become self-sustaining, and has generated additional income streams in the School. AROW has been directly involved in developing a Faculty web education system (Cox et al. 2002). We provide web services to attract student enrolments. AROW collaborated with off-shore partners to offer postgraduate courses and international education in action research with locally facilitated learning sets. We provide research students' learning circles and on-line research supervision. AROW has built capability for Internet research. AROW makes a positive contribution to each of the main functions of the Faculty: teaching, research, community service and service to the University.

Gaps uncovered

The main aim of this paper is not to catalogue achievements, but to identify gaps between our performance in AROW and the needs of sustainable development for the future. The first of these relates to the nature of action research. AROW has not won external competitive research grants, and has contributed only two papers to peer reviewed research journals. This is a gap between aspiration and performance in a competitive research climate. On reflection, there is also a gap at the more fundamental level of values and ideology. The statistical overview might give an impression that the primary purpose of AROW is to teach action research as a type of normal research in the health sciences. However, the underlying values and ideology of AROW point to something else.

Documents on the AROW web site, including the Action Research Electronic Reader, adopt Bob Dick's view that action research is action *plus* research. In e-mail discussion AROW has held the view consistent with standard health science research textbooks (e.g. Minichiello et al. 1999) that the broad category of scientific research includes many types, and action research is one of these. AROW supports technical action research to improve health systems and services within existing structures of administration, funding

and power. Examples include action research to improve professional techniques (e.g. Brooker 2000) and surveys to improve services to disadvantaged and exploited groups (e.g. GTZ et al. 2003). Technical action research can produce useful outcomes, but is rarely emancipative. It often supports and strengthens existing, perhaps oppressive, structures of wealth and power. There seems to be a gap between this practice and claims that action research is liberating and committed to social justice. However, this view may be too simplistic. In complex systems, we expect to find different kinds of change and different kinds of action, research and inquiry simultaneously. A range of action inquiry projects have been undertaken in AROW including developmental, collaborative and emancipative as well as technical action research.

In documents on the Web site AROW places an emphasis on action research rather than other forms of action inquiry. AROW practice includes action learning, reflective practice, and developmental action inquiry, but these appear somewhat understated.

There is a gap between the collaborative and participatory aspirations of AROW and institutional practices that reward competitive research and hoarding intellectual property. AROW developed collaborative relationships outside the Faculty, but in at least one instance, these were undermined by competing interests within the Faculty. It has been difficult to build internal collaboration, and AROW has relied too much on the efforts of one person.

AROW has a commitment to social justice, cooperation and peace. The publication of Reason & Bradbury's Handbook strengthened our confidence in seeing action research in an ethical frame of reference. Action Research ... *is a participatory, democratic process concerned with developing practical knowing in the pursuit of worthwhile human purposes, grounded in a participatory worldview* (Reason and Bradbury 2001a: 1). The purpose of action research is not the

development of knowledge for its own sake. Action research is part of building a better world. This has not been explicit on the AROW web site. In complex systems, ethical principles may act like strange attractors, and the lack of a clear and operational statement of values may be a significant gap in the AROW system.

Discussion

AROW is a learning community in a traditional University. University managers are not system thinkers, and do not easily recognise that AROW delivers capacity building, innovation and organisational learning. Institutional arrangements reward internal competition, and disincentives to cooperation persist. Action inquiry is not well entrenched in the institutional arrangements of the University. In early 1998, AROW moved from one school to another within the Faculty of Health Sciences, and was not included in strategic plans of the new school. The web site was closed, and colleagues at Southern Cross University published some resources to ensure they continued to be freely available on the Web. AROW was re-established, and re-built to become self-sustaining. Though it has survived and achieved a degree of acceptance in the Faculty of Health Sciences (Hughes 2001), AROW is not yet well entrenched in the institutional arrangements and culture of the University. In the current climate of increasing economic rationalization, declining income and increasing academic workloads, the experience of 1998, when the AROW project was closed, could be repeated. When Cornell University no longer had resources to support PARchives, the global action research community lost a valuable free library. The lack of a strategy to ensure that on-line resources are sustained is a gap in AROW that, perhaps, could be discussed in a network of action researchers.

Globalisation increases international communication, and opens new opportunities for international cooperation and sharing. At the same time, the political and ideological

underpinnings of globalisation are having a serious impact on the administration of health and education, while wealth and power become increasingly concentrated in fewer hands (Sheil 2001). Action research is of special interest in developing health systems, where resources for research are very thin on the ground. WHO, UNICEF, the World Bank and major development agencies promote action research as having an important role in sustainable development. If action inquiry is to contribute to sustainable development, our theory should keep pace with our practice and the challenges of a rapidly changing world. Many global and local problems of development are instances of systems archetypes (Senge 1990: Appendix 2), such as 'fixes that backfire' (Senge et al. 1994: 125-129), the unintended consequences of yesterday's solutions. Global warming and environmental degradation result from technologies to improve living conditions. Policies for economic growth produce inequality. The march of scientific medicine has side effects include rising costs and unequal of access to health care. In parts of Africa, half the population is infected with HIV/AIDS while scientific health care is able to cure illness and extend life better than at any time in history.

Systems thinking and action research can make connections between micro-level problems of sustaining AROW and macro-level issues like sustainable global development. Intuitively, we believe that individual issues like angry emotions are linked to global problems like war and pestilence. Normal science separates psychology, economics, sociology, politics, anthropology, and ecology into separate disciplines with different rules and procedures. A connection not made explicit in AROW is that relations between these levels can be thought as a hierarchy of systems. A system at one level in the hierarchy contains systems at levels beneath itself, interacting as sub-systems and elements (Boulding 1956). When systems are arranged in a hierarchy as in Table 5, the micro-macro linkages become clear. We can trace connections between psychology, economics, sociology,

politics, anthropology, and ecology. Each level in the hierarchy incorporates all the levels below it, plus emergent properties. Systems at each level include sub-systems from levels below them in the hierarchy, with interactions between sub-systems. Emergent properties arise at each level in the hierarchy. Just as you can't 'divide your elephant in half' and have two elephants (Senge et al. 1994: 91), the complexity of systems cannot be understood through analysis. Prediction is not always possible in complex adaptive systems (Axelrod and Cohen 1999), but we do our work with and in them. Methods for multiple observation, such as Senge's 'five disciplines' (Senge 1990) and Flood's 'four windows' (Flood 1999) are ways to describe complexity. In AROW, theoretical discussion has not kept pace with developments in the practice of action inquiry.

Table 5: Systems hierarchy

Level	Type of system
5	Global exchange
4	Nation or State (Inter-organisation relations)
3	Organisations
2	Groups
1	Individuals

Conclusion

This paper has reviewed a decade of Action Research On Web. Gaps have been identified, which can be useful in planning for sustainable development for the next decade. In reviewing the achievements of a decade of action inquiry, I am pleased to have been associated with many projects that have made small, local contributions to empowerment and social justice at the local level. Some students have said that

they have grown past cognitive knowing, into that broader arena of values based systems thinking. I have been privileged to make a small contribution to some heroic work by front line health workers in Africa. If I weigh these achievements against the small numbers of peer-reviewed research papers and lack of competitive research grants, I am satisfied.

Action inquiry is needed for sustainable development. An issue for members of the Australian action research community is whether it is possible for us to organise a sustainable national action research program that is not dependant on the good will of any single institution. Bringing SCAIR and ALARPM together, as they are at this conference, seems like a good place to start.

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The next issue of the ALAR Journal will be a bumper special edition focusing on the ALARPM 6th and PAR 10th World Congress held in Pretoria, South Africa, 2003. It will include:

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All contributions are welcome ... please send expressions of interest to LCundy@bigpond.net.au before 15th March 2004 or call me on (61-7) 3345 7499.

Confronting the gaps by being present in 'not knowing'

– Anna Bloemhard

Abstract

These are profoundly upsetting and changing times and surfing the waves of change requires skills and qualities that are both fresh, innovative and artful. This implies that there is not a clear roadmap or blueprint to follow, in other words we have no clear knowledge on how to proceed. Paradoxically, this 'not knowing' may be the only way to confront the gaps, although it contradicts the very basis of most academic training, proper research and scientific knowledge. Not knowing, it is argued, allows for being present to the moment, the fertile void and the emergent properties, as is so well described in chaos theory. Using the work of Bernie Glassman (1998) this paper suggests some personal inquiry tools, which support bearing witness, whilst surfing the waves of change at the same time.

Introduction

Emancipatory action researchers face the paradox of having to position themselves as observant, expert researchers/group facilitators whilst at the same time taking an active part in the cooperative inquiry process as equal participants. This involves the awareness of self as an individual and at the same time being aware of being part of the group's process. Moving away from either/or positions, action researchers need to be aware of, and present in, both positions at the same time. Rudolph, Stevens, Taylor and Foldy (2001) distinguish between a further paradox which involves occupying both positions in the action research process: the 'on-line' reflective phase of cooperative inquiry or group learning, which is well documented and is often

complemented by the 'off-line' process, which may take place at the same time. The 'off-line' reflexive activity of each participant and importantly of the action researcher, is more likely to take place in private and includes analysing one's own intra-psychic processes in relation to rank, power and privilege. According to Cherry (1999: xiv) this process demands the 'acquisition of highly self-conscious and self-reflective processes for gaining wisdom about self'. The work of Glassman (1998) will be used to illuminate and enhance this process with clear examples of practice, rather than scholarly debate, on the importance of this practice.

Zen Peacemaker Order

Glassman is a social activist and founder of the Zen Peacemaker Order, who initiated the extensive and impressive 'Greyston Mandala' community-building project in New York. His work with underprivileged people involves cooperative inquiry and consultation processes for desired outcomes, processes that seem very similar to action research. Volunteer workers in the Greyston project are required to participate in a series of workshops to examine their beliefs, knowledge and understanding of the order of 'things', before they are allowed to become team leaders. The objective of these workshops is to learn to 'bear witness' and to come to a place of 'not knowing'. In the Zen Buddhist tradition this place is not about ignorance or happy go lucky foolery. 'Not knowing' it is about finding a place of 'innocence', a place with little pre-judgments or preferences or at least with a clear knowledge about what we think we know.

Collaborative research

Much has been written about the subjective nature of qualitative research that rejects the factual objectivity and neutrality of the researcher, as in for instance the ethnographic participant-observer role (Clifford, 1988; Miles and Huberman, 1994; Schein, 2001, in Reason & Bradbury,

Reason and Hawkins, 1988). The researcher is asked to declare the epistemological perspective informing the subjective and interpretive nature of knowledge creation and how this process is influenced by, for example, the cultural beliefs and values from researcher and participants alike (Regher, 2000: 204). Similarly, the role of the researcher in the action research cycle has been well described and reveals many references to what Rudolph, Stevens, Taylor and Foldy, (2001:405) call the 'on-line' phase of research. This is the action research group's co-operative, experiential inquiry into the issues that are figural and those that remain in the background, the force fields that determine the area of interest, our interactions, the outcomes and the conditions that foster change.

In contrast, 'off-line' research is often retrospective and examines the contextual issues and 'hidden agendas' from a safe distance. It involves, amongst other things, inquiry into the researcher's (or other participant's) personal attributes and how these contribute and influence the collaborative phase of the action research process (ibid, 2001: 411). Paradoxically these off-line activities are an integral part of the 'on-line' activities and are sometimes barely separated. The value of 'off-line' activity is important for participants, but becomes essential for the critical-subjective researcher as it influences the direction of the action research focus and clarifies the interpretive and analytical process of what is privileged in meaning making, in a process that Eikeland (2001: 152) calls 'self-transformatory critique'. This off-line activity often takes place in the relative privacy of the researcher's office, although final consultation may still take place. Off-line inquiry is a less confrontational process by moving away from immediacy, interpersonal dialogue and critique; however, for that same reason it is a more difficult process.

Self-inquiry

Cherry (1999: 11) distinguishes three levels in this clearly more intra-personal dialogue: the highest level of awareness distinguishing itself as a meta-skill, where one is engaged in analysing one's own life world in cycles of deep personal inquiry. Bravette Gordon (2001) gives an in-depth description of her journey of intra-personal inquiry in relation to being silenced as a black woman and being the 'other' in Western society's dream. It takes enormous courage and what Bravette Gordon calls 'a strong, motivational drive for intentional self-transformation' to face one's inner world. Tongue in cheek, Freudians would say that this is impossible without the help of a neutral, expert therapist. Zuber-Skerritt (1991) also argues that critical self-reflection cannot take place in isolation and Gestalt theory agrees that it is particularly difficult to face one's demons, our dark side (Mackewn, 1997). This is especially true if the 'other' in us, our deep layers of conditioning, is grounded in the dominant paradigm of separatism, mastery and about the way we use power, rank and privilege (Hall, 2001: 175). Cherry (1999: 7) acknowledges this by uncovering the potential for action researchers to have to face fundamental questions about how we choose to live our lives.

Being present

I believe that each of us is a unique nucleus of knowledge, values and information processing, which is in constant flux depending on the field we are moving in. Therefore, as part of self-reflection, and being attentive to what we bring to any given situation, researchers need to be aware of who and what is present in each moment. The awareness continuum in Gestalt Therapy explains the concept of being (more or less) present in ongoing cycles of awareness and experience of what is figural (Kirchner, 2002). Heron and Reason (2001: 184) pose that action researchers need to be 'present and open' and continue with a list of interpersonal qualities that

are usually attributed to ministers and counsellors. Alan Clements (2003) goes one step further by inviting mutuality in 'engaged presence', when two or more people interrelate and are present in a shared moment and are fully aware of this synergy. Presence really is confronting the gaps with an open mind.

Not knowing

The question of what stops us from being present needs to be asked. Glassman (1998) argues that 'knowing' or rather 'having a road map by which to live our lives' prevents us from opening up to each moment anew, fresh and innocent. Knowing allows us to make assumptions, judgments and plans on how to proceed based on old experiences, or future expectations. He continues to say that knowing 'what should happen blocks seeing what does and can happen' (ibid, 1998: 67). However, entering a situation without a road map can be quite uncomfortable and upsetting, because there seems to be less control and our expectations may not be met. Percy (1992, in Cherry, 1999: 87), describes 'not-knowing' as a 'willingness to tolerate ambiguity' whilst Heron (1998, in Cherry, 1999: 87) talks about accepting 'chaos' rather than 'intellectual closure'. Ambiguity and not knowing contradicts the core premises of our training as scientists, academics and researchers. Paradoxically fear of chaos and the desire to know prevents us from surfing the gaps. In contrast, 'not knowing', which is related to what Senge et al. (1994: 378) call 'suspending assumptions' or refraining from judgment can be described as allowing us to be present with what ever comes up *in the moment*.

Bearing witness

In Gestalt therapy bearing witness is described as allowing the dance of the 'figure-ground' patterns to flow freely whilst, in open systems theory it invites emergent properties (Cherry, 1999: 87). Being present, open and aware thus means to become part of 'a creative experience', the 'fertile

void', which involves the whole person, wholeheartedly (Perls, Hefferline & Goodman, in Wolfert, 2002). Heron (1997, in Reason & Bradbury, 2001) states that the process of 'bearing witness' or being mindful to self and others does not require rigorous spiritual practice but can be achieved by being self-reflective and open to what is in everyday life. Glassman (1998) agrees and says that bearing witness to the movements of the mind, without judgment and without attachment is to embark on a deep personal journey of discovery and inquiry. Both are also part of the tradition of 'insight meditation' where silent sitting (bearing witness) is often interspersed with deep questioning of the self (not knowing).

Tools for self-inquiry

What are some of the techniques and tools for deepening awareness that researchers can use, either in the privacy of their homes, or as part of a collaborative inquiry? The first self-reflective question that action researchers who want to 'bridge the gap' and 'surf the waves of change' is one that admits to not even knowing oneself, and is therefore one that asks: 'who am I, or what am I in this instant?' Who is surfing the waves and in what direction are we looking? For a surfer on a beach, waves roll in and are high, low, choppy and either the surf is up, or it is not. What are we looking for in action research? What do we want to achieve? Surf up? Market up? Zen Master Hogen (1998) complements the 'who am I' question and suggests that we continuously ask 'what is the use of this?'

The previous paragraph provided some practical suggestions on how to embark on this journey of self-inquiry. Hogan's question 'for what?' or 'what is the use of this?' can be asked in the privacy of one's own office: 'For what am I doing research?' Answering this question was one of the most illuminating and immediate experiences of being 'engaged in the present', that I recently experienced during a research retreat. Another cycle of this question may have

delved even deeper in what each of us involved in research is moved to be. Similarly the question 'who am I now?' could give an immediate answer in an on-line and of-line inquiry of the roles and expectations of the researcher.

Bearing witness is a way of becoming more present in both attitude and skill. It involves observing what is going on for self and others whilst refraining from actions and value judgments that interrupt the continuum of experiencing. A meta-skill would be to observe these value judgments and interruptions of free flow with equal curiosity and openness: 'now I am doing this...' 'feeling this...' This process can be complemented by keeping journals and intensifies when one engages in collaborative off-line inquiry as described by Rudolph, Stevens, Taylor and Foldy (2001:405). How deep we want to go in our inquiry is up to each of us but, like an empty vessel that can be filled with anything, only from a deep place of not knowing can we begin to allow new, creative possibilities to emerge which can support surfing the waves of change.

Surfing the waves of change

The present world situation is a time of deep change where a turning point is more necessary and more possible than ever (Seed et al. 1988; Macy, 2003). The power plays inherent in the capitalist market place are once again leading us to the brink of a world war (and some predict 'a ray of sunshine' as the war machine may feed the economy). Regher (2000) warns about research 'that reflects the dominant social construction of reality' and leaves out questions of values and ethics. Therefore, I pose that the focus of action research must be on how to create from this place of 'not knowing' respectful, non-violent, peaceful and cooperative 'I-Thou' relations in the marketplace. An oxymoron? This may well be and since the focus is on 'not knowing' there is room for that wave too. From this place of 'not knowing' anything can happen and it possibly will.

Conclusion

The concept of being present and bearing witness to one's own state of 'knowing', or rather 'not knowing' could provide a useful starting point for reflexivity in cooperative inquiry. Therefore I would like to suggest that formally acknowledging and incorporating the concept of 'not knowing' could be very valuable for socially responsible action research which surfs the current, dramatic waves of change respectfully, rather than holding on to fixed positions or expectations of 'market up'.

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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.

**Surfing the waves of
environmental change to
generate participative change:
A healthcare service's response to
the turbulent health care
environment
– Linda Taylor**

Introduction

The Rehabilitation and Aged Care Service is a publicly funded sector of St Vincent's Hospital, Lismore. It is managed as an independent service due to the intricate nature of the performance agreement with the Northern Rivers Area Health Service and the nature of rehabilitation services.

One of the key issues impacting on health care organisations, such as this, is the need to improve workforce resource management to facilitate best practice (Department of Health, 1994: 35). The reason for this is that the health care environment, particularly the external environment, is rapidly changing.

Regardless of the organisation, public or private, there are three certainties in healthcare; change, change and more change; reduction of funding in real terms; and a move to procedure payments (Clinton & Scheiwe, 1998: 162; Sanders, 2000: 1). Therefore, innovation to meet these challenges is no longer an option, it is essential. In order to achieve this, organisations need to avail themselves of processes that enable them to review their organisational structures to allow for innovation through workforce development and,

subsequently, best practice (Braithwaite, 1993: 384; Department of Health, 1994: 35; Graetz, et. al, 2002: 56).

Strategic management can be undertaken through a process of facilitating long range service planning through participation of all levels of staff and representation from the community they serve (Emery & Purser, 1996: ix; Wheelan & Hunger, 2002: 109). This paper will demonstrate that effective strategic management using participative processes is essential for organisations that wish to survive the turmoil of the rapidly changing healthcare environment and develop the workforce to provide best practice. Building the capability of the people within the organisation develops the capability and sustainability of the organisation on an ongoing basis (Hase, Cairns & Malloch, 1998: 39).

Case study

Prior to the Rehabilitation and Aged Care Service being an independent service, St Vincent's Hospital had a traditional bureaucratic organisational structure, which resulted in the Rehabilitation and Aged Care Service being fragmented with no leader, no common goal and unclear lines of communication. This resulted in a lack of accountability and reinforcement of territory issues amongst functions.

It was recognised that specialist teams (such as rehabilitation) need autonomy, which makes it difficult for such a team to operate within a large health care system that is organised departmentally and hierarchically. Therefore, the team needs to organise itself into a unit that has its own timetable of activities, reporting structure and is flexible. These issues generally conflict with the traditional bureaucratic management structures in hospitals that are organised departmentally and hierarchically in functional/discipline areas because they cut across functional areas and thus cross territorial disciplinary boundaries. Therefore, changing this structure at St Vincent's

Hospital was undoubtedly going to create some conflict due to the territorialism that traditionally existed.

Using a strategic management approach, the board and management at St Vincent's Hospital embarked on a journey of organisational change to ensure the viability of the rehabilitation and aged care services. This included restructuring the organisation into a semi-autonomous unit – the Rehabilitation and Aged Care Service (RACS). A manager (Leader RACS) was recruited for the service to facilitate a strategic management approach to service planning with full participation from all staff.

Immediately following the restructure and the recruitment of the Leader of RACS, a planning meeting was organised with a facilitator who uses participatory processes based on open systems thinking. These planning sessions have been conducted annually since 2000.

Scanning the external environment

Participants undertook an 'environmental scanning' exercise in small groups to identify the broader external environment over the next 3 to 5 years within which the service had to undertake its planning. The group considered the economic, social, technical, environmental, religious, governmental and political factors operating at the local, regional national and international levels that would impact on the service's operations over the next 3-5 years.

There was a high level of agreement amongst participants in identifying a range of factors that would have the greatest impact on the work of the Rehabilitation and Aged Care Service at St Vincent's Hospital. This included: political game playing and swinging seats; economic rationalist philosophies operating at the political level; continued pressures on the funding of health care; increasing demand on service with no increase in funding; increased focus on

the quality of patient care at the funding level; increased patient expectations; decreasing resources; pressures to move to community-based care; the aging nature of the population; new procedures, practices and technology; increased accountability of professionals; and increased expectations relating to the areas of research, education, accreditation, OH&S, and ethics.

These factors were seen as being largely out of the control of the service and so its future depended on its capacity to actively and innovatively adapt to their existence.

Identifying strategic factors (opportunities and threats)

Participants analysed the above environmental factors with respect to the opportunities and threats they afforded the service over the next 3-10 years and what they implied for the priorities of the Service.

Financial pressure was seen as the major factor, which also was closely allied to politics and the potential trade-offs between patient care and finance. Threats were seen to come from decreased funding leading to reduced staff / patient ratios, change in work practices, increased demands on family, pressure on beds, the inability to update equipment and a lack of lobbying skills on the part of management. The opportunities were seen to arise from the development of more innovative management structures and work practices. The implications were that unless the service was able to change it would end up ceasing to exist.

The major threats of the changing roles arising from new procedures, practices and technology that were continually being introduced were seen to be: the inability of staff to adapt, the lack of financial resources needed to underpin training and equipment purchase, ethical issues and the increased time pressures arising from the accountability-based paper work. The opportunities identified arose from

the improvements in patient care arising from the changes and the opportunities for staff to be involved in more rewarding roles such as research and holistic practice. The implications of getting this right were improved patient care and satisfaction, and improved communication. The implications of not getting it right were burnout, fear, a loss of client focus and possibly shutting up shop as patients go elsewhere. Rehabilitation Services can either adapt innovatively to these changes by refining business and clinical processes and extending the rehabilitation model of care to include community services or face a loss of contract, accreditation and funding.

Internal scanning: Organisational analysis

Internal strategic factors are those critical strengths and weaknesses that are likely to determine whether the organisation will be able to take advantage of the opportunities whilst avoiding the threats (Wheelan & Hunger, 2002: 81).

Participants identified the following as the major strengths of the service's operations: Staff commitment to compassionate high quality care and service despite poor facilities, staff levels, experience and resources; the mutual support operating amongst the majority of staff; staff commitment to the provision of high quality service to clients; a commitment to professional development to keep abreast of the continuing change procedures and technology specific to rehabilitation and aged care; and the presence of the wide range of community based services on the one site.

On the other hand the major weaknesses were seen to be as follows: an ever increasing level of documentation and meetings leading to a decreasing amount of time devoted to patient care; lack of privacy for patients; the geographical spread of the facilities; lack of an activities officer; resistance to change; and dysfunctional communication.

A view from our customers

In an environment of scarce resources, healthcare leaders are forced to look for innovative ways of implementing cost efficient strategies to ration these resources (NHMRC, 1993: 2). This often results in less than equitable distribution of resources to the community. When analysing an organisation's strengths and weaknesses and planning service improvements it is vital that the organisation consult with the community to which the service is delivered. The principles of social justice recognise that consultation with the people the service is designed to assist is vital, if it is to be effective, appropriate and accessible to that group (Oliver, 1996: 25). People have the ethical right, collectively as a community and as individuals, to control their health care and treatment and be involved in the planning of the services that deliver it (NHMRC, 1993: 3; Oliver, 1996: 25).

To assist with the environmental scanning process, eight patients were invited to form a panel to present their experience of the Rehabilitation and Aged Care Service. The following (Table 1) are the major factors in order of priority from the perspective of the patients that emerged from their stories and the subsequent discussion.

Valentines

I mentioned previously that the changes to the structure of the service had created some conflict amongst the troops! For the new structure to work, the service had to start with adopting the mindset that the patient is the essential ingredient, central to all that we do (Braithwaite, 1993: 389). Hence, the inclusion of the session a 'view from our customers'. Secondly, there must be a belief that all team members are equal and valued. A mutual trust and respect for fellow members needed to be cultivated and developed

(Hanks, 1994: 13). We needed to create an understanding that there are distinct roles for members and recognition that grey areas of shared abilities and skills do exist. These

should be acknowledged and used constructively by all members of the team (Barr, 1993: 474; Hetherington and Earlam, 1994: 528).

Table 1: Patient perspectives on the strengths and weaknesses

Rehab staff do an excellent job. They are capable and caring. Gratitude.

Lousy facilities that leave a lot to be desired; Lack of privacy, bathrooms, corridors, bedrooms; Lack of washing machine and dryer; Poor aesthetics; Inadequate toilets – need a toilet door rather than a curtain; Relatives and friends appalled by the physical conditions; Lack of wheelchair access.

Weekends are boring and lonely; Need for diversional therapy; Lack of therapy at weekends.

Uneven access to rehabilitation across the region.

Lack of area to relax for patients and their families; Lack of covered area outdoors.

Fear of unknown prior to first attendance.

Visiting hours too long detract from therapy.

Need volunteers.

Importance of emotional support.

In preparing for the workshop, this conflict between areas and the need to develop a team-based structure based on mutual trust, respect for fellow members and recognition of the way shared and unique abilities can be used effectively was discussed at length. The facilitator thought that a 'valentines' process would be beneficial for cleansing the hidden and not so hidden conflicts between the professional groups.

Small heterogeneous groups brainstormed the following question for each of the following professional groups: Nursing; Occupational Therapy; Physiotherapy; Social work; Neuropsychology; Speech Pathology; Podiatry; Wards staff; Administration; and Medical.

"What are the things we need you to do differently if we are to succeed in cross functional group collaborations that will improve patient care, and bring about a positive change of culture within Rehabilitation Services?"

The results of the brainstorming were then collected and collated into bundles for each of the functional groups. Functional groups then met and were asked to report about each of the comments in one of the following three ways:

- *The things we will do differently in response to the requests;*
- *The things we will continue to deal with in the same way as before, with an explanation of why it is important to do it in this way;*
- *The things that we don't see as legitimate, with which we don't own or identify.*

Each of the groups undertook to do some things differently to assist their colleagues in carrying out their work. Many of them related to paperwork, professional respect, learning

from members of other professional groups and the handover of patients or of shifts. Some discussion was quite heated in this session, about which some staff still comment on today – 3 years later! However, the process worked. Much of what was being said as whispers and quiet innuendoes in the corridors prior to the workshop, were aired in a controlled environment. Thus allowing people to recognise and value their differences, build on their strengths and improve on their weaknesses. I just don't mention the word 'valentines' within the walls of rehabilitation!

Strategy formulation - developing a shared mission/vision

A shared mission/vision can translate learning from a reactive to a proactive process (Limerick, Cunnington & Crowther, 1998: 182). It articulates a view of a realistic, credible and attractive future for the organisation that is better than what currently exists. It will generate enthusiasm, focus attention and instill confidence in the people within the organisation (Shultz & Johnson, 1990: 68; Limerick, et. al, 1998: 166; Aaker, 2001: 27; Wheelan and Hunger, 2002: 11).

Lippert's study (1983, in Dannemiller & Jacobs, 1992) found that participants in a group that developed and articulated their desired future or vision, had increased energy, ownership of the situation and developed more innovative and future oriented goals than the control group who purely identified service issues and the actions required for the issues. Networks or product-line services need to develop their own, shared vision or focus statement as a part of a second order, broader, value-adding chain. A shared focus and effective leadership defines the identity of the service, whilst transcending the mission of the organisation.

Staff were briefed on the nature and purpose of a 'Focus Statement' and the advantages of getting the staff of the service collectively undertaking its development.

Participants were arranged in nine tables of eight. Each table of participants were asked to list on flip charts the elements they would like to see in the Focus Statement. The resulting reports were then posted on the walls and participants identified those elements they wanted to see included and those they wanted excluded using coloured dots. Each table identified one of its number to join a work group to take these sheets and draft a coherent statement that reflected the workshops priorities. This draft statement was then discussed, amended and unanimously adopted in a plenary session in the following terms (Figure 4).

Together we can...

Optimize patient's potential by providing quality rehabilitation and aged care services delivered by a specialist multi-disciplinary team

Provide diverse innovative services through ongoing professional development, education and research

Ensure equitable access to all members of our community

Figure 4: RACS Focus Statement:

Strategy implementation

Strategy implementation is the process by which strategies are put into action (Wheelan & Hunger, 2002: 15). The environmental analysis data was used to formulate strategic actions and methods of implementation. This is the time for creative out-of-the-box thinking that provides the opportunity for breakthrough strategies to be developed rather than the extrapolation of past strategies with a financial spreadsheet (Aaker, 2001: 292). It involves the synthesis of all the data collected and encourages intuitive, innovative and creative thinking at all levels of the organisation (Mintzberg, 1994; Sherer, 1994: 22; Graetz, et.al,

2002: 55). Getting the balance right is important as there is a fine line between the over-prescriptive steady-as-she-goes approach whilst avoiding launching into pie-in-the-sky schemes with no direction or focus that are doomed to failure (Graetz et. al, 2002).

Participants of the 'think-tank time' will influence the critical elements of the organisation's overall strategic directions through interactive exchanges with the organisation's executive/leadership team (Aaker, 2001: 293). The leadership team will transform the organisation when participants are given the opportunity to provide valuable feedback and feel that the leadership team has listened and emerged with a more holistic direction that integrates the best thinking from all perspectives (Dannemiller & Jacobs, 1992: 489). This learning produces new perspectives and strategies that take on exceptional value as committed people infuse them with energy. Implementation becomes part of the journey that all participants are engaged in and enthusiasm builds along the way (Mintzberg, 1994: 109).

Following agreement on the prioritization of the most important strategic factors, participants of the RACS planning meeting were asked to identify participants and roles whose collective experience and responsibility was sufficient to arrive at desirable yet achievable recommendations for each strategic factor. The groups were asked to develop concrete recommendations that will be reported back to the whole team for discussion, possible alteration if needed, and adoption.

Conclusion

These processes enabled the participation of all staff in the Rehabilitation and Aged Care Service, and the community that it serves, to strategically plan the operational delivery of best practice services in response to the rapidly changing and turbulent health care arena. It has provided a basis from

which appropriate strategies that are consistent with government planning, the local area health service, and the hospital can be formed, implemented and evaluated. The service will then move forward with a common vision and goal in the spirit of respect, collaboration and working together as a team.

Traditional approaches to planning have proven unsuccessful for motivating people within organisations to take responsibility for their collective futures. Successful planning in turbulent environments requires collective learning about where we want to go, where we are and what we need to do to get there. This must be done by the people, for the people and with the people (Emery & Emery, 1989: 10; Emery and Purser, 1996: 76; Bunker and Alban, 1997; Aaker, 2001: 293; Graetz, et.al, 2002: 55).

Furthermore, strategic management in partnership with staff and the community can provide innovative and flexible processes to develop the workforce to facilitate best practice on an ongoing basis. Building the capability of the people within the organisation, through strategic management and effective participative and reflective processes, will in-turn develop the capability and sustainability of the organisation. Traditional approaches will only result in myopic vision, alienation and a loss of confidence in the social fabric of our organisations.

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There are many communities around the world involved in action learning and action research, some of them are isolated from like minded colleagues by their different disciplines.

In the interests of bringing these communities closer together, we invite you to tell us about your local action learning/ action research network

ALARPM Annual Report

- AGM, 22 September 2003

Overview

From big things some little things have been growing...perhaps a little more slowly than anticipated!

Over the past years ALARPM has been gradually moving towards operating more as an international organisation – having started with a small group of people in Brisbane, Australia in 1991 when the first thing it did was hold a World Congress. In the immediate past year we continued with this but perhaps a little more slowly than hoped as we entered our ‘Congress year’ – this time in South Africa. World congresses seem to become all-consuming! They take 3 years to organise, numerous people and sub committees, and Herculean efforts by their local organising committees and members of the ALARPM liaison committee. They rarely fail to satisfy most of the needs of attenders, and the program for this year’s in Pretoria promises to maintain this standard.

Our networking membership *Directory* came out in October 2002 thanks to the able production efforts of Anne-Marie Carroll. And two issues were produced of our popular *Journal* under the equally able editorship of Lyn Cundy.

Most members stayed on from our previous year’s Committee of Management of 21 people across 6 countries - the USA, UK, South Africa, Australia, New Zealand and Papua New Guinea. This provided a valuable source of continuity and stability and a crucible for more of us to learn the ropes before some key long-standing members retired at the end of the year. We also co-opted a member from a

potential Singapore branch. We now have a stable annual calendar of activities.

Overall we had the sense that more people each took on their own special 'corner' of the organisation's activities, and this makes for a more sustainable organisation when each of us is so busy in our worklives. Most importantly we went on enjoying each other's company as we worked for the goals of this field of endeavour to which we are so committed.

Overall the field is going – globally – from strength to strength. In some ways ALARPM does not yet reflect this. Many of us are working in underfunded areas and overall the dominant paradigm still provides the societal 'default' system. Little by little as people witness the value of our 'integration and implementation sciences' (as the Australian National University consortium of the same name is currently calling them collectively), this is turning around and a 'morphing' or 'hybridisation' is taking place as more and more constructivist, participatory and iterative elements become routine even in mainstream research and evaluation processes and projects.

Key highlights

The World Congress in South Africa

The fruition of three years work, that began with a Memorandum of Agreement between ALARPM and the local Congress Organising (Sub) Committee, is only seven sleeps away as I write! The 2003 joint World Congresses (of ALARPM's 6th and PAR's 10th) will be held at the University of Pretoria, in Gauteng Province, South Africa with the opening Mayoral reception on Sunday 21st September and the Closing Ceremony on Wednesday the 24th of September. A large overseas contingent of around 100 people will join more than 200 from the African continent, and as I write people are packing their bags and boarding planes in the

same spirit of courage and faith in our common humanity that characterises also 'the new South Africa'.

This world congress - with its inclusive theme - '*Learning Partners in Action*' and relevant subthemes for all our various 'strands, streams and variants' - has been the first to rely (as are so many other such conferences worldwide) on the medium of the world wide web as the key source of information and engagement. As part of the now-traditional formal evaluation report we will look forward to hearing how this and all the other exciting aspects of the congress turn out in an honest appraisal from which the next congress-organisers can learn. Certainly the local Congress Organising Committee and the ALARPM Executive Liaison Committee members have been working exceptionally hard to produce a terrific program in response to the many excellent-looking offerings from all over the world. ALARPM and the Congress organisers have also worked to achieve an historic third joint congress with the international Participatory Action Research Network, and, although at times communications have been complex, we have confidence that with so much effort this and other hoped-for outcomes will be achieved.

It is appropriate to mention the enormous individual contribution of the Congress Advocate Ortrun Zuber-Skerrit. Ortrun who retires from the Committee this year has spent three years nurturing this congress and expending a significant proportion of her personal time so doing. Ortrun personally took enormous responsibility to ensure its success, in particular by assembling an international support committee to assist generate funds and registrations.

An Australian national conference in Coolangatta/Tweed Heads

Shankar Sankaran convened a working group that drew its membership from the very able Brisbane Conference Organising Group to organise 'Surfing the Waves of Change' held 4-5 May 2003. The website was attractive, and the

conference was both creative and high on interaction. It was also very well-attended, made a modest surplus, and the standard of papers and discussions was high. The two-locations proved interesting and illustrated how the split between theory and practice need only be marked by a socially-constructed interstate border of a matter of hundreds of yards between shopping strip hotel and university campus! A selection of the papers will appear in *ALAR* journal for those members unable to attend. We thank Shankar and all involved for this marvellous event.

ALAR (Action Learning Action Research) journal

Editor Lyn Cundy has continued to attract interesting and readable practice methodology contributions for a journal whose niche among a growing range of journals remains that of its intentional accessibility. An attractive new cover and a revised board of editorial consultants were also features. Two issues - our 14th and 15th - were produced in the past 12 months. The first came out in October 2002 (Vol 7 No 2) and featured 10 papers comprising a 'scan of the field' resulting from a Melbourne-based Research-In-Action Symposium attended by 90 people. The second came out in May 2003 (Vol 8 No 1) and featured papers from the Brisbane Facilitators market (convened by Geof Hill with the Brisbane conference group).

A special two volume ALARPM issue of *The Learning Organisation* was also prepared by Ortrun Zuber-Skerrit with contributions by herself, Herbert Altrichter, Richard Bawden, Mary Farquhar, Stephen Kemmis, and Robin McTaggart (Vol 9 Nos 3-4, 2002).

A special ALARPM issue of *Systemic Practice and Action Research* journal was prepared by Pam Swepson with contributions by Ortrun Zuber-Skerrit, Bob Dick, Ann-Marie Carroll, Ron Passfield and Yoland Wadsworth. This effort was marred by a loss of authorship attribution at the

printer's proof stage, a matter which was fortunately quickly corrected.

A locally, nationally and internationally active Committee

We maintained our modest movement from being both a Brisbane-centred and Australian-centred organisation to one that is more a global network/er-of-networks. Brisbane remains important to the coherent support for the organisation but gradually we continue to de-centre – such as by some elements of the Secretary role being ably taken on in New Zealand (thanks due to Pip Bruce-Ferguson) and some elements of processing new members' applications in the USA (thanks due to Susan Boser). Our four full committee meetings were each conducted by e-list over 1-3 weeks of relatively high volume e-mail. For two of the meetings we experimented successfully with a different style of Agenda to deal with our lengthy standing organisational agenda (focusing on several items with the remainder 'under the line' unless needing reporting or attention) in order to increase cohesion and participation. The committee also experimented with an e-AGM extension internationally, recognising that as we hold our AGM in any one place, sometimes we may not achieve a quorum. People expressed that they appreciated this form of participation.

A range of local events were held, features included Susie Goff's co-convened successful NSW Skill Development Network Building and Public Life through Action Learning Interactive, on 21 November 2002 in Sydney; the NZARN's annual conferences in Rotorua, one at which Ortrun Zuber-Skerrit was keynote speaker, and Facilitators' Markets and Community of Practice events in Brisbane.

Organisational change

Susan Boser also joined Yoland on a (very) modestly-sized two person working group to try to match the organisation's constitution with some of its changing role – indicated by the

Special Resolution to introduce two categories of membership for ALARPM of 'organisational affiliate' and 'associate'. Over the past year and the coming year we will continue to explore mutual benefits of this with candidate organisations (such as the UK's CARN and New Zealand's ARN).

We continue to be keen at every step of this expanded networking and organising that we contribute to, maximise or safeguard the *autonomy* of local and national groups' self-organising structures; the strengthening of links *between* the autonomous groupings and the capacity for any committed individual people to also still be able to be *actively involved* in ALARPM, independently of any organised groupings.

ALARPM website

We were less successful in moving to Stage 2 - a slightly higher-tech site, which was drafted but not yet loaded with content and launched. We found instead we were able to put into the existing Stage 1 site many of the planned new content elements - such as past Journal issues and links. That website address is: <http://www.alarpm.org.au> - check it out! Slowly but surely it will improve. In the coming year we will move to both transfer the content into the Stage 2 design and contract out the move to fuller e-capability (e-joining, e-contributing to Directory, e-discussion, e-mentoring).

We also thank Jo Murray for her excellent maintenance of the Committee's, the Executive's, the journal's and the website's list serves. Yahoo got a bit bumpy towards the end during the Great e-virus Scares, but hopefully has settled now.

Next plans

The new committee of management will both attempt to free up some of its creative capacity by examining the possibility of paid administrative assistance and also carry on work already planned. The latter includes:

- reinvigorated local/state or national networking and organising;
- website and e-capacity development;
- the holding of a national conference in Darwin (convened by Iain Govan);
- organising/supporting the next two world congresses – hopefully in Mexico (primarily organised by the international PAR community in 2005), and in Europe in 2006 primarily organised by a Netherlands ALARPM-linked local committee (hopefully still also with the PAR community);
- new policy to govern increased self-management of conferences, congresses and events
- and eventually additional changes to the superseded elements of the Constitution;
- early in the next term of the Committee of Management, the 2003-2004 Membership Directory will be produced by its new editor, Shankar Sankaran of the Southern Cross Institute for Action Research.

Many thanks

Finally we thank the dedicated and energetic members of the past year's Committee of Management (and Executive – asterisked, and who maintained continuity between Committee meetings):

Pip Bruce Ferguson*	NZ liaison, part Secretary
Pamela Kruse	Brisbane Group liaison
Anne-Marie Carroll*	Treasurer and World Congress liaison and memberships and Editor Networking Directory
Susan Boser	USA liaison and memberships co-secretary
Ross Colliver	WA liaison
Betsy Crane	USA liaison
Lyn Cundy	Editor, ALAR Journal
Susan Goff	NSW liaison

Iain Govan*	Immediate past President and World Congress liaison
Winston Jacob	PNG liaison
Deb Lange	SA liaison
Jo Murray	Convenor, Website Sub Committee
Ted Sandercock	SA liaison
Shankar Sankaran*	Vice President (International matters)
David Tripp	Co-opted, Singapore liaison
Pieter Du Toit	Chair, World Congress Organising Sub Committee
Gail Janse van Rensburg	World Congress Organising Sub Committee, South Africa
Ortrun Zuber-Skerrit*	Vice President (World Congress), Sth African World Congress liaison
Yoland Wadsworth*	President and international PAR community World Congress liaison, Co-ordinator Website Stages 1 & 2, Victoria liaison
Susan Weil	UK liaison

The work of the committee centred on supporting the AL,AR & PM paradigm via:

- promoting networks/groups and their activities, etc;
- promoting face to face meetings/conferences/seminars etc;
- promoting other resources and publications, including the website; and
- managing the affairs of the association to sustain all of these.

Our financial situation has remained secure, again thanks to careful stewardship of our finances, primarily by Anne-Marie Carroll whose outstanding contribution to the organisation's financial accounting needs to be recognised here as she retires from her role on the Committee. Lyn Cundy also retires from the Committee after many many years in various roles, but will remain Editor of *ALAR* journal.

In recognition of their enormous amount of work for ALARPM, Anne-Marie, Lyn and Joan Bulcock have been nominated for life membership of the Association. The full citations will appear in ALAR journal in order to do justice to their contributions to ALARPM's being the success it is today. On a personal note I thank Anne-Marie, Lyn and Joan for being both friends and supporters of me in my current role.

Retiring also is Ortrun Zuber-Skerrit after an association dating back to having been ALARPM's co-founder. Ortrun's contribution has previously been recognised with life membership and we may well have to identify a special category of clan eldership to mark her continuing meaning to (and her ongoing support for) this organisation to which she has been so central. Shankar Sankaran will also retire from the Committee but we are glad to retain his valuable input through his move to being Editor of the *Membership Directory*.

In conclusion, our annual membership fees continue to be our personal investment in the continued strengthening and growth of the action research, action learning and process facilitation field. We look forward to as many members as possible taking the opportunity to serve the field at some time by spending a year or two (or three) on our ALARPM committee. Many hands do more work!

*Prepared by Yoland Wadsworth, ALARPM President,
on behalf of the ALARPM Association Inc, 14th September, 2003*



Just a few of ALARPM's new Committee of Management at the Congress in Pretoria 2003

Left to right: Lou Myles, Pam Kruse, Margaret Fletcher, Judith McMorland, Susan Boser, Yoland Wadsworth, Pip Bruce Ferguson
Front: Pieter Du Toit, Gail Janse Van Rensburg

Committee of Management Report - edited by Yoland Wadsworth

From your trusty Committee of Management's electronic meeting table...

We continue to meet four times a year as a full group (17 of us) and monthly as an Executive (6 office-holders) to maintain continuity between full committee meeting times. All meetings are now by email via Yahoo groups listservs maintained by ALARPM and committee member Jo Murray.

The full list of committee members – and much more – is on our ALARPM website: <http://www.alarpm.org.au>

Here are some of this year's new committee people (freshly appointed or re-appointed in Pretoria, South Africa at our AGM in September 2003) and their hopes for their work on the committee this year...

Pip Bruce-Ferguson is our able Minutes and nominations secretary in New Zealand. A role she now shares with Australian-based Margaret Fletcher. She got involved in ALARPM back in the early 1990s when she attended a World Congress in Brisbane. She has also attended World Congresses in Ballarat and Pretoria.

Pip writes: I really enjoy the feeling of shared values and commitment that I experience in the World Congresses and have also found in the Exec and Management Committees. My vision for ALARPM is to continue working in the collaborative tradition, but particularly to help facilitate the expansion of our networks to include other countries/cultures, which is why attending South Africa was so exciting. It's really exciting to see how Action Research is gaining 'credibility' in a range of countries. I'm also currently promoting it as a way forward to help develop our research culture in a new Maori 'university' (*wananga* is the Maori word).

Susan Boser is a self-described middle-aged white woman from the rural American northeast (but others who know her will add: very *youthful* middle aged :-). Married with three teenagers, she spent the first half of her adult career working in human services with the rural poor. She became active in grassroots activism for reform of social services, which inspired her to return to graduate school at Cornell University. While there she became involved in (and quite passionate about) action research. She is currently teaching in a Sociology Department at Indiana University of Pennsylvania, a large USA public university, and coordinates a doctoral program in Administration and Leadership Studies. After twenty years involved in rural human services in the US, she completed a PhD at Cornell that involved using action research with local government to explore strategies for redesigning administration of such services.

Susan writes: I am active with ALARPM because I am deeply committed to furthering the values associated with action research, and believe that we best do so through collective efforts. ALARPM's focus on building connection and promoting dialogue through supporting network-building at the local level and linking these internationally is completely aligned with my interests. My vision for ALARPM is simply continued evolution along this path. My particular dream is to see an Action Research network develop in North America.

Susan will also be liaison with the proposed next World Congress of Participatory Action Research with ALARPM in Mexico in 2005.

Jo Murray is involved in using action learning as a leadership and teacher development/ change strategy in her work in vocational education in Australia. She works in flexible learning, using Information and Communication Technologies to make learning experiences richer, more engaging, more motivating and more accessible.

Jo writes: I joined the ALARPM committee because my skills enable this group to meet across time zones and countries. (Actually Jo manages 4 list services for us – for the Committee, Executive, Journal and Website).

Pamela Kruse works as a Human Resources consultant for CITEC, which is an information and communications technology service provider throughout Australia. Pam has been involved for many years in the Brisbane Australia sub-committee, which is a group of seven people who plan, host, organise and cater for an event, and have an enjoyable time as they do so! This year the ALARPM Brisbane Group hosted five Community of Practice meetings discussing action research. (They are also the people who held the very successful Facilitators' Markets.)

Pamela writes: I'm pleased to participate again as a member of the Committee. I enjoyed the Congress in Pretoria, South Africa and thank again all those who contributed to make it the success it was. I was a Committee member in 2003 and several years ago was also a committee member for a couple of years, during the years when the Bath and Cartagena Congresses were being organised.

Yoland Wadsworth is currently working across two states of Australia: establishing an Action Research Program at Swinburne University in Melbourne Victoria, and also working in Integration and Implementation Sciences at the National Centre for Epidemiology & Population Health at the Australian National University in Canberra, Australian Capital Territory (where she's additionally involved in Public Health capacity-building through a Sustainability and Health project). She promised a year as prez and then came back for a 2nd and now a 3rd -and-final year (to step aside for someone with fresh energy).

Yoland writes: What excited me about ALARPM was how - with some active work particularly by Susie Goff - it began to get a committee of people coming from all over the world. That got me thinking and I began to wonder... what if

ALARPM “scaled up” in all ways to be a truly international organisation - not just because it runs the world congresses (which is probably already enough really!) but because of its commitment from the outset to both networking and to the idea of bringing together people in all the multiple ‘strands, streams and variants’ using this theory of knowledge. I am truly enamored by the ideas that flow when people using the same epistemological paradigm come together from all sorts of different settings, histories and usages. Hence my determination not to leave till I’ve got our website Stage 2 finished and studded with the inputs from all our new organisational members from many countries! I’ve loved our ALARPM committee meetings and made some great friends through them and look forward to another year of the same. As Pip says there’s something brilliantly enabling to be in a critical mass of folks who think differently together...especially when most other folks we work with don’t always share our assumptions. (Though I observe that changing.)

Judith McMorland is commencing her second term on the committee and will be the New Zealand Action Research (NZARN) network liaison person. She works halftime in the University of Auckland Business School where she teaches postgraduate, executive and professional students, specialising in the management of change and innovation. And has her own practice as an OD consultant/facilitator, where she tries to link action methods with action learning and research and inquiry. Her AR practice centres around peer partnership inquiry and a current project is looking at how organisations live their values in practice and justly.

Judith writes: I enjoyed the Pretoria conference and am enthused to continue with ALARPM.

Gail Janse Van Rensburg was one of the core members of the ALARPM WC6th organising team, and she is from Vaal Triangle Technikon in South Africa. She joined ALARPM during the World Congress in Ballarat in 2000 and since then

ALAR became a strategy of how she works, functions and does research. She is currently digging deeply into educational literature and educational practices in South Africa for a topic for a PhD.

Lou Myles' background is in political science, social science and public administration. She has worked in diverse organisations, had a stint as a political analyst for a United Nations agency, engaged in various community development settings, and is currently involved in a policy and program development work with the Queensland State Government focusing on key population groups.

Lou writes: The congress in South Africa was my first involvement with ALARPM and I am looking forward to further involvement.

Geof Hill's major work with ALARPM will be as Treasurer. He has been with ALARPM since its inception and involved at the local level since moving to Brisbane nine years ago, with Philosophy Cafes, Facilitator's Markets and the recently completed Community of Practice. His income-earning work involves Executive Coaching and he has a contract with Queensland University of Technology coaching (critical friending) some of their academic staff in research supervision practices. He has a similar contract with Ed Qld with a group of classroom teachers looking at their pedagogy. His current research interests are in thesis examination and he hopes to start a collaborative effort soon with Bob Dick, Shankar Sankaran and Pam Swepson investigating their examination practices as they examine action inquiry (research) theses. He is also in rehearsal for a cabaret on 'Doing a Doctorate'. He can also be found on <http://www.the-investigative-practitioner.com>

Geof was able to spend 3 months in this role before resigning. There have been two main consequences after the committee absorbed new learnings from this. One (which had been approved by the previous committee) is to move to greater self-responsibility for budgeting by our local,

regional, national and international conference, congress and event-auspicing local committees. Many of these are in any case – and increasingly – local organisations that are independent of ALARPM, but with whom we will contract ALARPM-style events with the ALARPM name and which we hope will also become ALARPM organisational members, now that we have that new category of membership available. Secondly we will need to find new income-earning methods (such as paying workshops before conferences or world congresses) to sustain the ongoing payment of administrative/financial office assistance.

We are seeking a new treasurer from within the Committee but if unsuccessful we will return to you the members for a new volunteer - by which time the job will be less onerous! (Some familiarity with or access to the MYOB bookkeeping software will also be helpful, as this is what ALARPM uses.)

Other members of the new committee are **Ross Colliver** from Perth, Western Australia *who writes*: As for my motivation for being on the Committee, well first, I'm holding the line here for WA; second, AR/AL is what I care about professionally. **Pieter du Toit** from South Africa convened the last world congress, held in Pretoria South Africa, and **Ben Boog** from Netherlands is convening the next world congress in Europe (Netherlands, 2006). **Ted Sandercock** from South Australia is busy with teaching and undertaking consulting work. **Geoff Woolcock** is one of the new members of the Committee this year, and sees himself in part as a conduit for promoting ALARPM and other associated events by means of his own Centre's (Community Research Centre, University of Queensland) substantial contacts list – this being consistent with the Centre's ongoing efforts to promote engaged social science and community-based research. He also may be able to assist ALARPM's connections with growing networks with Canadians who were noticeably absent in Pretoria (as were some others from far-flung parts of the globe, notably South America). He

looks forward to participating in the rest of the committee's discussions as they emerge.

Mentoring people keen to be involved in action research, action learning and process facilitation

A beaut idea emerged (from Pip) in our most recent Committee meeting we thought worth sharing wider a field. Pip has long been interested in how practitioners can get their work out to wider audiences. Here she proposes people using their academic positions to assist...

One way to encourage and mentor new action researchers is to seek actively to include them in a paper that you're wanting to present somewhere, local or international. You don't even have to have met face to face! I did a paper with someone when we hadn't ever met, but just talked by email. I've now done a number of joint papers on action research with colleagues in my institutions as a way of 'inducting' them into presenting their interesting classroom-based action research in a wider forum. The technique works quite well. The 'new researcher' recognises that their work deserves a wider audience and can be presented as credible on a wider stage. Not all of them have gone on to present individually after we've co-written, but a couple have. I think it's an idea that's worth considering.

When I was a staff developer at my last institution, I co-wrote a paper with an early childhood educator in which we took an intervention the ECE team had applied, and constructed it as a 'retrospective' action research report. The aim was to link 'normal practice' to action research; to help the ECE team see how easily they could gain research publications out of 'normal practice' and also to demonstrate the AR plan/act/observe/reflect cycles. It was cited as one of the ten best papers at HERDSA last year so we must have got something right!

Thanks Pip for that. More ideas like this please?

Some Committee reflections on World Congress 6&10

And now, some early reflections on the Pretoria World Congress from several of the many (actually 11 out of 18) committee members who were able to attend. A more formal evaluation will come from the Pretoria organising committee at another time.

The first, in the form of prose-poetry, is a bit of fun in the spirit of the exchanges between South Africa and ALARPM during the Congress!

From Pip Bruce-Ferguson...

The Congress now has come and gone
We're sad to see its end
We've learned a lot from those who came
Met up with many a friend.

We felt the warmth of welcome here
Expressed in various ways
From gestures small to actions large
There's been a lot to praise.

The Congress dinner - what a treat
For stomach and for eyes!
The 'zebra bags' when taken home
Have gained us envious sighs.

Your Dean's ability to share
Has well exemplified
The innovative practice here -
No wonder there's such pride!

The speakers, whether "key" or not
Have caused us to reflect
To see what wisdom we might use
And what we should reject.

So, as we travel back to homes
In north, or east, or west
We bear warm memories home with us
And leave South Africa, blessed.

From Susan Boser...

I would like to offer my appreciation for the World Congress, and the wonderful hospitality of Pieter, Gail and their colleagues. I left with many warm memories and a deep appreciation for this country. Many aspects of the World Congress were wonderful - opportunity to connect with colleagues from around the world, to learn about wonderful examples of AR/AL taking place in different venues, to have my intellect tantalized with new ideas. As a presenter, I also appreciated the luxury of a full 30 minutes in which to deliver my paper and take questions. I felt "heard", a marvelous gift, as I am quite passionate about this work. My only question was already posed: I am interested in understanding better the relations with the PAR community and what we might do to engage them more fully with the ALARPM-sponsored congresses.

Margaret Fletcher's feedback...

The conference was my formal introduction to ALARPM. I found the conference very successful professionally, culturally and socially. The keynote speakers were well chosen and hugely informative. Predictably, the workshops, papers etc were variable in terms of what I got out of them - but I always feel this reflects the delegate's perspective as much as the presenters. They were all well-prepared and interesting to hear. The AV people were brilliant!

Congratulations to Pieter and the hard working team...

I know this is a perennially problem for professional organisations - but I wonder if the conference could have been more widely advertised. (Yes!! Yes!! I bet it was...) Some of the conference alert websites might be worth investigating for next year. I hope the conference was a financial success as I felt it was value for money and a great excuse to fulfill a life wish to visit the Cape of Good Hope!

From general discussion...

Some miscellaneous feedback includes a question about the absence at Pretoria (and wanting to see at future congresses) more of those who write about AR – but so far do not attend the PAR Congresses. It was suggested a more concentrated focus on AR might be more enticing in this regard. A similar point was made by several about the absence of PAR people – who particularly require low-cost registrations (and ways to know about these).

Peer reviewed papers and abstracts...

The papers and abstracts from the World Congress of ALARPM/PAR in Pretoria 2003 are now on the website. The peer reviewed papers can be viewed at:

<http://www.up.ac.za/academic/education/alarpm/proceedings.html>

A report to the Committee from two local networks – and what has been learned about network-organising

Yoland Wadsworth reported in on a local Victorian network - SPIRAL (Systemic Participatory Inquiry Research Action Learning), and addressed the question of what we might learn from doing that...

SPIRAL – Victoria, Australia

SPIRAL is an ALARPM-style organisation (i.e. multiple streams) and initially ALARPM-co-aided – along with existing local PAR group of 18 years: ARIA - Action Research Issues Association, and the ARP - Action Research Program at Swinburne. Its meetings have been held at, and in association with Borderlands, a PAR-using Co-operative. It is not an ALARPM organisation per se. (I hope it will become an ALARPM organisational affiliate member – now we have that possibility available.)

Maybe the mass of acronyms and organisational names involved in SPIRAL tells you a lot already about launching a network! In a way SPIRAL is a network-of-networks – just

as ALARPM will hopefully network SPIRAL and other local, regional and national networks.

But firstly it needed a start to the process. :-) In this instance it was Susie Goff as National Vice President of ALARPM - responsible for encouraging networking throughout Australia - who then invited me. I had, as part of the work of coordinating the Action Research Issue Centre run by the Action Research Issues Association, been compiling a database for about 5 years after our FOPAR (Friends of Participatory Action Research network) went belly-up after merging with ALARPM. (ALARPM had decided it had to double its fees for its own survival - but unfortunately this was exactly when we merged, resulting in the loss of 80 of the 100 members).

From my new adjunct position at Swinburne Institute for Social Research I contacted as many of the existing organisations and interested individuals as possible and consulted around the possibilities (I spent over 3 months contacting 300+ people). A 'vehicle' seemed like a good way to launch some kind of Victorian network/group - and also to test the interest in the idea of bringing together the multiple strands, streams and variants. So Jose Ramos, also from Swinburne - from the Australian Foresight Institute - but who was working with me at the time, and I brought together a small organising group of mainly ARIAians and designed a Research-In-Action Symposium. Originally a day - but after consultation we made it from lunchtime to 9.30pm, in two sessions before and after a dinner. We expected 30 people, registered 50 and 90 came on the day! That was in September 2002.

Over the symposium dinner we met for the first time and SPIRAL emerged. It has an on-paper organising group of 16 though we all know that follow-up meetings lose most people. A group of 10 in November 2002 then designed a year's worth of activities (4 meetings), which have all been well attended (15-25 people at each) throughout 2003. A few

weeks ago a slightly-different-some-the-same group met and planned an equally rich program of offerings for 2004. In 2003 people introduced discussions on: AR in multi cultural settings; the AR resource team in the Federal Family & Community Services department's "Strengthening Families/Communities"; PAR evaluation in international development evaluation by 1st world funders, and presentations and reflections by those who attended the world Congress in Pretoria.

The most successful networks I've ever been associated with have had carefully timed and carefully located face to face meetings/times for people to just exchange what they are doing - a bit of sit and hear one person's input and a lot of hear-each-other and talk together. AND it works to talk together on carefully judged/elicited themes everyone is facing, illuminated by case stories, PLUS ways to circulate information about events/activities. The e-mail vehicle is brilliant for low effort re the latter.

It is also worth recognising that there will seemingly always be a keen core group and a large group of come-and-go people. The keen planning core group seems to like to repeat at their meetings the same formula of sharing/getting things out of meetings as with the bigger group meetings (that is they are not just strictly biz planning meetings). People also bring things to show, distribute or sell at the large meetings and people like that a lot.

The last lesson learned is that groups and networks can come and go. And that's OK. They all rely on people, energy and some money/resources. And these come and go. ...but they always seem to come again! (...so far as we can say... :-)

New Zealand Action Research Network (NZARN)

The New Zealand Action Research Network was started by Eileen Piggot-Irvine just over ten years ago. It is a small but active network that produces around three newsletters per year and hosts one conference. Pip Bruce-Ferguson a

member, reports 'we have had a variety of fascinating keynote speakers including Ron Passfield, Bob Dick, Robin McTaggart, Patricia Maguire, Yoland Wadsworth and Ortrun Zuber-Skerritt.'

Our next conference will be held in picturesque Christchurch on 8 - 9 July 2004. Its theme is 'Think global, act local' and the keynote speaker will be Geoff Mills of Southern Oregon University, whose *Action research: a guide for the teacher researcher* (2nd edition) was published this year. Expressions of interest to bridget.oregan@cce.ac.nz or see

<http://www.cce.ac.nz/conferences/action>

Treasurer's Report - Year ending 30 April 2003

First I must give my apologies for not being present at the AGM but I was unable to make the trip to the Congress. Thanks Pip for standing in for me. Attached to this report are two documents:

- (1) Income & Expenditure Statement; and
- (2) Balance sheet.

The audit of our accounts is complete and did not identify any problems. Unfortunately, we were unable to get the necessary signatures on the Accounts and Audit report in time to get them to South Africa.

In presenting this report, I would like to provide some background about our financial plans this year, some explanation of the attached reports and some thoughts for the future. Please note that generally all figures are in Australian dollars. You can multiply by about 5 to get the equivalent in Rand.

Background

We continue to experience the financial benefits which resulted from the World Congress in Ballarat in September, 2000 and now three subsequent years of modest cash surpluses. After several years of very lean financial times, this is a welcome change.

The Management Committee resolved to use the surplus from the Ballarat Congress to allow ourselves some margin for unexpected events, to provide seed funds for the next Congress and to fund the development of our website. We hope that the third stage of the website development will eventually allow us to substantially reduce costs in administration, postage, printing etc and hopefully allow different fee strategies. We were determined to “live within our income” in terms of annual income (excluding the Congress) and our usual annual activities - ALAR Journals, Networking Directory and administration. We have been successful in this objective.

Attached Reports - Income and Expenditure

Some factors affecting our net income this year:

- Membership income remained steady although renewals were down slightly and new memberships a little higher;
- Income from membership fees almost exactly matched our membership costs which include the ALAR Journals, Networking Directory, website and general administration;
- Total profit from conferences was down slightly but spread more widely. Instead of one large conference in Brisbane in 2001, there were events in Brisbane, Sydney and Melbourne in 2002;
- There was only a small expenditure on our web development this year (shown as computer support) and

the planned and budgeted web development will be carried forward to next year;

- Our “employment expenses” remain low as we have continued to rely heavily on volunteers to complete administrative tasks free of charge. Volunteers have run each conference or similar event and we need to thank these active and hard working organising committees.
- Final profit is around A\$5000 based on accrual accounting principles.

Attached Reports - Balance Sheet

Our financial year ends on 30 April, 2003. As of that date, our cash position could be summarised as follows:

Funds in our main account	\$24,000 (approximately)
Fixed Income Bond	<u>\$15,000</u>
Total Funds Available	\$39,000

These funds are committed as follows:

Seed funds for WC8&12	\$10,000
Web development	\$2,000 (budget for 2004)
Permanent reserve for future World Congresses or other events	<u>\$15,000</u>
Total Committed	\$27,000

This leaves us with about \$12,000 as liquid funds to begin the financial year.

We provided \$10,000 or R54,000 as seed funds for this Congress. Gail Janse Van Rensburg, as the Congress Treasurer, and all of her colleagues have been diligent and thorough in their budgeting and financial management. We have had regular teleconferences to provide support and assistance and keep the communication and consultation channels working between the ALARPM Association and the Congress Committee. The University of Pretoria and a range of other institutions have provided financial or “in kind” support. We are confident that Congress will be financially viable as well as successful in other respects. I

would especially like to thank Gail for the excellent work she has done to ensure this result.

Thoughts for the Future

I have been working this year at trying to simplify administration and reduce double handling. The recommendation for constitutional change to alter the date on which our financial year ends is part of this process. There are other smaller practical changes which I hope will make the job easier in the future.

Thanks to those who helped

Finally, I have to say thank-you to all my colleagues on the Management Committee and the Executive. I want to say a special thanks to Pip and Susan Boser for their contribution to what has been part of my role – Pip for emailing membership renewal notices and Susan for taking on the co-ordination of new members. As I did last year, I thank Joan Bulcock who is a great friend and colleague for her assistance. We seem to have shared the Treasurer’s job over the past decade. Again, we met a number of times in the year for all day meetings where we worked on the “tricky” things - reconciling cash and other payments from conferences, following up outstanding accounts, reconciling GST accounts and preparing Business Activity Statements. Having a friend to share the burden made all the difference. Thanks Joan.

I want to thank Yoland for her wonderful leadership of the association and for her friendship and support. Finally, I am delighted that Geof Hill has accepted a nomination to take over a treasurer. I know he will do a wonderful job and I assure him of my assistance.

Anne-Marie Carroll

Treasurer

**ACTION LEARNING, ACTION RESEARCH AND
PROCESS MANAGEMENT ASSOCIATION INC.
ABN 41 587 420 126**

**INDEPENDENT AUDITORS' REPORT
FOR THE YEAR ENDED 30TH APRIL 2003**

Scope

We have audited the special purpose financial report of Action Learning, Action Research and Process Management Association Inc. for the year ended 30th April 2003 as set out on pages 2 to 5. The committee is responsible for the preparation and presentation of the financial report and the information contained therein. We have conducted an independent audit of the financial report in order to express an opinion on it to the members. No opinion is expressed as to whether the accounting policies used are appropriate to the needs of the members.

The financial report has been prepared for the purpose of fulfilling the requirements of the Associations Incorporation Act (Queensland) 1981. We disclaim any assumption of responsibility for any reliance on this report or on the financial report to which it relates to any person other than the members, or for any purpose other than that for which it was prepared.

Our audit has been conducted in accordance with Australian Auditing Standards. Our procedures included examination, on a test basis, of evidence supporting the amounts and other disclosures in the financial report. These procedures have been undertaken to form an opinion as to whether, in all material respects, the financial report is presented fairly in accordance with Australian Accounting Standards and other mandatory professional reporting requirements so as to present a view which is consistent with our understanding of the Action Learning, Action Research and Process Management Association Inc. financial position and results of its operations.

The audit opinion expressed in this report has been formed on the above basis.

Qualification

Our audit has been confined to recorded transactions within the books of account.

Audit Opinion

In our opinion, subject to the effect on the financial report of the matter referred to in the qualification paragraph, the financial report presents fairly in accordance with applicable Accounting Standards and other mandatory professional reporting requirements the financial position of Action Learning, Action Research and Process Management Association Inc. as at 30th April 2003 and the results of its operations for the year then ended.

P M Hertzig

HERZIG PROSSER & CO
Chartered Accountants
Indooroopilly Shopping Centre
322 Moggill Road
Indooroopilly

**ACTION LEARNING, ACTION RESEARCH AND
PROCESS MANAGEMENT ASSOCIATION INC.
ABN 41 587 420 126**

**FINANCIAL REPORT
FOR THE YEAR ENDED 30TH APRIL 2003**

Statement by Management Committee

The Committee has determined that the association is not a reporting entity and that this special purpose financial report should be prepared in accordance with the Associations Incorporation Act (Queensland) 1981.

In the opinion of the Committee the financial report as set out on pages 3 to 5:-

- (1) Presents fairly the financial position of Action Learning, Action Research and Process Management Association Inc. as at 30th April 2003 and its performance for the year ended on that date.
- (2) At the date of this statement, there are reasonable grounds to believe that Action Learning, Action Research and Process Management Association Inc. will be able to pay its debts as and when they fall due.

This statement is made in accordance with a resolution of the Committee and is signed for and on behalf of the Committee by:-

Yoland Wadsworth

President

**ACTION LEARNING, ACTION RESEARCH AND
PROCESS MANAGEMENT ASSOCIATION INC.
ABN: 41 587 420 126**

**INCOME AND EXPENDITURE STATEMENT
FOR THE YEAR ENDED 30TH APRIL 2003**

INCOME	2003	2002
Conferences	11,828.55	21,498.22
Interest	1,087.49	290.76
Membership Fees	10,266.35	10,287.88
Publications	121.36	535.46
	-----	-----
TOTAL INCOME	23,303.75	32,612.32
	-----	-----
EXPENDITURES		
ALAR Journal	2,683.90	3,506.02
Audit Fees	600.00	400.00
Bank Fees	571.10	841.31
Computer Support	180.00	105.23
Conference Expenses	7,669.89	15,091.89
Cost of Books Sold/Library Gifts	58.89	2,517.79
Depreciation	52.24	162.00
Discounts given	-	7.28
Employment Expenses	725.69	695.68
Insurance	745.77	577.50
Interest (ATO)	57.01	0.00
Internet Access	569.95	444.95
Management Committee Meeting Costs	27.99	133.67
Networking Directory	2,564.13	3,409.62
Photocopying	170.55	236.20
Printing, Postage and Stationery	459.05	1,116.93
Registrations	68.00	28.36
Software	545.00	0.00
Sundry Expenses	-	105.00
Telephone and Fax	240.92	237.13
Travel Expenses	142.53	0.00
World Congress 6 & 10	-	164.53
	-----	-----
TOTAL EXPENDITURE	18,132.61	29,781.09
	-----	-----
NET SURPLUS HEAD OFFICE	5,171.14	2,831.23
	-----	-----
WORLD CONGRESS ACTIVITIES*		
World Congress 5&9	-	2,680.02
	-----	-----
NET SURPLUS	\$ 5,171.14	\$ 5,511.25
	-----	-----

The accompanying notes form part of this financial report.

**ACTION LEARNING, ACTION RESEARCH AND
PROCESS MANAGEMENT ASSOCIATION INC.**

ABN: 41 587 420 126

**BALANCE SHEET
AS AT 30TH APRIL 2003**

ASSETS	2003	2002
Current Assets		
Cash at Bank	23,936.57	39,744.04
Fixed Income Bond	15,000.00	15,000.00
Petty Cash	86.26	34.76
Undeposited funds	152.20	93.50
Accounts Receivable	442.00	218.50
GST Refundable	252.04	-
Sundry Debtors	0.35	-
Withholding tax refundable	120.00	120.00
Loan - seed funds for WC 6/10	10,000.00	-
Prepayments (WC6&10)	2105.61	-
Stock on Hand	1,134.38	1,164.18
	-----	-----
Total Current Assets	53,229.41	56,374.98
Non Current Assets		
Office Equipment	807.97	807.97
less Accumulated Depreciation	(807.97)	(755.73)
	-----	-----
Total Non-Current Assets	-	52.24
	-----	-----
TOTAL ASSETS	53,229.41	56,427.22
	-----	-----
LIABILITIES		
Trade Creditors	68.00	5,167.54
GST Payable	-	2,329.41
Memberships in Advance	170.00	1,110.00
	-----	-----
TOTAL LIABILITIES	238.00	8,606.95
	-----	-----
NET ASSETS	52,991.41	47,820.27
	-----	-----
MEMBERS FUNDS		
Opening Accumulated Funds	47,820.27	42,309.02
Add Surplus - Head Office	5171.14	2,831.23
Add Surplus - WC 5&9	-	2,680.02
	-----	-----
TOTAL MEMBERS FUNDS	\$ 52,991.41	\$ 47,820.27
	-----	-----

The accompanying notes form part of this financial report.

**ACTION LEARNING, ACTION RESEARCH AND
PROCESS MANAGEMENT ASSOCIATION INC.
ABN 41 587 420 126**

**NOTES TO AND FORMING PART OF THE FINANCIAL
REPORT
FOR THE YEAR ENDED 30TH APRIL 2003**

1. This special purpose financial report has been prepared for distribution to the members to fulfill the Management Committee's financial reporting requirements under the Association's constitution. The Committee has determined that the Association is not a reporting entity.

The financial report has been prepared in accordance with the requirements of the Associations Incorporation Act (Queensland) 1981.

2. There are no mortgages, charges or securities affecting the assets of the Association.

3. There are no other known liabilities.

4. Seed funds of \$10,000 allocated for the World Congress in Pretoria on 21st-24th September 2003 are held by the Conference Organisers at the University of Pretoria and shown here as a loan. The Conference Organisers received registration fees of R6,800 and paid expenses of R13,740 to 30th April 2003. The balance of the Congress account as of 30th April 2003 was R47,317. Based on a conversion rate of \$1 equals R4.8118 for April 2003, this is the equivalent of \$9,834. In addition, \$2,105 has been paid in Australia for expenses associated with the Congress - this is shown as a prepayment. Full details of all income and expenses will be included in the financial report for the year ending 30th April 2004.

Noticeboard

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

Think global - act local - NZARN Conference 8 - 9 July 2004

The New Zealand Action Research Network (NZARN) is a small but active network that produces around three newsletters per year and hosts one conference. The next conference will be held in picturesque Christchurch on 8 - 9 July 2004. Its theme is 'Think global, act local' and the keynote speaker will be Geoff Mills of Southern Oregon University, whose *Action research: a guide for the teacher researcher* (2nd edition) was published this year. Please send expressions of interest to bridget.oregan@cce.ac.nz or see <http://www.cce.ac.nz/conferences/action>

ALARPM National Conference - Kormilda College, Darwin, Australia 10 -11 July 2004

Planning is still in the early stages, but the theme is likely to explore multiculturalism and diversity. A strong Indigenous involvement is planned with unique contributions told in personal stories from locals and interested visitors. We hope you can make it to the Top End for what promises to be a memorable event! Please send expressions of interest to the Convenor, Iain Govan. Email: iaing@bigpond.com

SPIRAL
- 2004 Provisional Calendar of Events
(to be confirmed)

SPIRAL...²

The Victorian action research network of people interested in Systemic - Participatory - Inquiry - Research - Action - Learning



After a meeting on 18 December 2003, we are pleased to announce a series of action research events taking place over the coming year that may interest you. This year, instead of a guest presenter, we have chosen key topics we think reflect shared concerns facing the whole field at present. The discussion for each of the meetings will thus be started by a 'round robin' of those attending, and then opened for dialogue.

² SPIRAL is a Victorian network formed from the Victorian members of ALARPM, ARIA and other former networks and interested individuals. It is jointly auspiced by the Action Research Program (ARP) of Swinburne University Institute for Social Research and by the Action Research Issues Centre (ARIC). ARIC is an ARIA project located at the Borderlands Co-operative at the Augustine. **Joint convenors** for 2004 are Yoland Wadsworth, Jose Ramos, Jacques Boulet and Margot Fitzpatrick.

We acknowledge with thanks the contribution of the ANZ Trustees and Perpetual Philanthropic Foundations towards support of this activity as part of a 2-year establishment phase for the Action Research Program (ARP) at Swinburne.

All events are tentatively 6.00pm (meet for a meal) and 7.00-9.00pm (for the discussion) at Borderlands, The Augustine, 2 Minona Ave, Hawthorn. However our commitment to rural members and people who prefer a city venue means details to be confirmed

From this year's SPIRAL organisers - Jacques Boulet, Margot Fitzpatrick, Marie Harris, Linette Hawkins, Caty Kyne, Ben Leeman, Jose Ramos, Yoland Wadsworth

2004 Calendar of Events

1. SPIRAL event #1 - 'The action research worldview and facilitation practice'

Friday 12 March 2004

What are the underlying assumptions and principles of action research and related methodologies? - *list* ...And how are we facilitating their ongoing emergence and use, without slippage to the 'default setting' of objectivist, less empowering or 'devoicing' assumptions/principles? - *description and conjecture*

2. Joint SPIRAL session with Deakin University conference, sponsored by Centre for Citizenship & Human Rights 'Community Development, Human Rights and the Grassroots'

Wednesday 14 to Saturday 17 April. Time and date of session to be confirmed.

Marie Harris and Linette Hawkins will commence a discussion around the topic of '*Professionalism consistent with participatory action research?*'

3. SPIRAL event #2 - 'Stories of action research leading to effective change and policy'

Wednesday 26 May 2004

We know the evidence - but others don't. Let's share what we know in an evening of story-telling and illuminative &

reflective critique (session to be taped for possible transcription & publication).

4. National ALARPM Conference, Kormilda College, Darwin - on theme of multiculturalism and diversity (with planned strong indigenous involvement)

Saturday 10 and Sunday 11 July 2004

A date for your diary if there's any chance you could get to the Top End (in mid winter :-)

(*Convenor*: Iain Govan)

5. SPIRAL event #3 - 'Dilemmas and victories around action research moving between margins and the mainstream'

Thursday 23 September 2004

There has been a continuing discussion around this topic across two world congresses. Let's examine where we have each got to now on understanding this 'paradox of success' or is it 'Scylla and Charybdis'?! ...or is it either *and* both? Are we coming or going? ... or both? The topic may also bear on the debate between pragmatist versus critical origins (and uses) of the paradigm. What are the limits to participation, to methods and sources of understanding, to the depth of theory possible, and so on...?

6. End-of-Year review, planning and festivities (...in that order :-)

Friday 3 December 2004

Review and planning over mince pies - and what about an action research theme Kris Kringle (now there's an enjoyable challenge for us! Perhaps Caty Kyne might lead a brief creative-thinking workshopping of the idea at the end of the September meeting... :-)

Call for papers - Action Research Journal

The new Sage-published journal Action Research, edited by Peter Reason and Hilary Bradbury, is planning four special issues during 2004:

1. Sustainability and Action Research
2. Ethics and Action Research
3. Action Research in large/whole systems
4. Reflective Practice and First-Person Inquiry

Special Issue: Sustainability and Action Research

Guest Editor: Hilary Bradbury

We invite submissions for a special issue of Action Research dealing with the topic of sustainability and action research.

The term sustainability has grown in popularity since 1987 where it was first defined in the Brundtland report as 'meeting the needs of the present generation without reducing the capacity of the future generation to meet their own needs.' Projects that help to build toward sustainability are underway in many fields of endeavour. Many involve trans-boundary collaborations with interdisciplinary partnerships required to make them work. As such an action research approach has been found particularly useful. In the fields of education, development efforts, business, natural resource management, etc., projects abound in which there is attention to balancing the needs of human communities, natural environment and economic needs. For example in the business world, corporations are partnering with NGO's to develop 'win-win' outcomes that benefit both shareholders but also a offer breakthrough approaches to

improve their impact on communities in which they do work and the natural environment. Early issues of Action Research have already included articles that report on the complex and innovative work that is required in facilitating sustainable systems (see contributions by Wakefield & Pimbert in issues 1(2) and 2(1)).

Among the topics that might be included would be examples of action research projects in which efforts to move a system toward a more sustainable state have been particularly salient.

How do action researchers facilitate trans-boundary cooperation? How can power elites work with those who have often been voiceless in how the resources of their community are developed? What new practices are developing in this complex work? How do action researchers in the field of sustainability develop projects that work toward scale, as argued by Gustavsen in recent issues of the journal *Concepts and Transformation*?

Clearly this is not an exhaustive list, and we welcome innovative and provocative approaches to considering these issues.

Please send proposals for contributions to the Hilary Bradbury at Hilary@case.edu by 1 May , 2004.

Special Issue: Ethics and Action Research

Guest Editors: Mary Brydon Miller and Davydd Greenwood, and Olav Eikeland

We invite submissions for a special issue of Action Research dealing with ethics and action research. Among the topics that might be included would be critical examinations of the ethical foundations that underlie the theoretical frameworks that inform our research and how these guide our practice. How does action research differ from more conventional social science research in terms of the ethical issues we face and how these are resolved? Do different forms of action

research embody different sets of values, and if so, how might we articulate these differences? How might classical philosophy and ethics inform our practice as action researchers?

We would also like to include examples of action research projects in which ethical considerations have been particularly salient. How do action researchers deal with issues of power, privilege, and representation when working in work, school, or community settings? And how do differences in age, race, gender, culture, and class influence the negotiation of ethical aspects of the research? How can we insure that the relationships we establish with co-participants serve their interests rather than our own? How do issues of intellectual property shape the way in which our research is reported and the manner in which authorship is assigned?

Authors might also consider exploring the ways in which the values inherent in our own institutions might be made more consistent with the egalitarian and democratic ideals of action research; or might look at strategies of protecting the practice of action research from cooptation. Clearly this is not an exhaustive list, and we welcome innovative and provocative approaches to considering these issues.

Please send proposals for contributions to Mary Brydon Miller at Mary.Brydon-Miller@uc.edu by 1 May, 2004.

Special Issue: Action Research in large/whole systems

Guest Editors: Susan Weil and Danny Burns

We are seeking contributions from people whose action research efforts involve outcomes of parallel and networked inquiries to support a widening of the boundary for learning and further inquiry. Such work is multi layered, multi-stranded and multi-voiced in its approach. It involves existing and new stakeholders engaging in action research

across organisational boundaries, as well as up and down hierarchies. It takes place in multiple sites - often in parallel, and involves using multiple methods. Starting points might include degenerative patterns that recur across a system, contradictions between espoused strategic or policy aims and values (and how these are lived across that system), and/or powerful questions that have a high charge across the system as a whole. These are then explored in specific contexts and communities of practice. Such work is characterized by iterative cycles of data collection and analysis, and multiple forms of knowing.

The issue will invite people to write about their work with and understandings of 'whole system' action research as practiced in specific contexts of complexity and uncertainty, and to contextualize such work, in terms of, for example:

- their own theories of practice
- action research literature (both in terms of what is present and gaps)
- conceptual, methodological and epistemological issues which arise from such approaches

Some of the specific issues that the issue will explore are:

- Working with systems through large scale events that both 'play back' inquiry insights and outcomes, and in turn stimulate further inquiry across the system
- How to support learning and research insights that travel across systems, using different forms of knowing
- Learning from patterns and contradictions across diverse practice contexts in a distributed system
- Tensions and possibilities in facilitating large system inquiry
- Power and intervention in large systems inquiry processes
- Participative approaches to whole systems work

Please send proposals for contributions to Susan Weil at s-weil@uwe.ac.uk by 1 May, 2004.

Special issue: Reflective Practice and First-Person Inquiry

Guest Editors: Judi Marshall and Geoff Mead

We invite people working with self-reflective, first person action research approaches to submit papers for a special issue which will explore the range, richness, delights, challenges and dilemmas of these aspects of action research.

First person action research can be described as: 'skills and methods [which] address the ability of the researcher to foster an inquiring approach to his or her own life, to act awarely and choicefully, and to assess effects in the outside world while acting' (Reason and Torbert, 2001, p17, *Concepts and Transformations*, 6: 1 1-37).

Sometimes the inquirer is mainly interested in developing their own practice and competence. Often, however, they are engaged in some form of self-reflective practice as an essential core discipline to underpin action research in which they are seeking to engage in mutual relationships with others or to influence change in organisations or social systems. There are a wide variety of terms which have been used to refer to these aspects of action research - such as action inquiry, living life as inquiry, reflective practice, heuristic research and mindful inquiry. A range of traditions and heritages are thus brought to understanding and to the pursuit of action which incorporates disciplines of some kind, alongside engaging with what emerges.

We welcome contributions from diverse perspectives which foreground self-reflective aspects of action research practice and thinking.

Please send proposals for contributions to Judi Marshall at J.Marshall@bath.ac.uk by 1 May, 2004.

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.

*I would like to receive more information about the
ALARPM Association and its activities*

Email: membership@alarpm.org.au

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Phone: (61-7) 3875 6869 (Margaret Fletcher, Secretary)

Fax: (61-7) 3342 1669

Email: membership@alarpm.org.au

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