ALAR

Action learning and action research journal

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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Editorial

Welcome to the seventeenth issue of the ALAR Journal. I feel a bit like the white rabbit in Alice in Wonderland, I keep saying to myself, "I'm late, I'm late!!" Unfortunately, the bigger and better the Journal gets, the longer it takes to edit, the later I become … still, I am confident you will be pleased with the result. This issue begins with a reflection on the World Congress in Pretoria by Pieter du Toit. Yes, that was 10 months ago, doesn't time fly? Pieter's "Personalised Lullaby for Four Drums" is an insightful analysis and evaluation of the action cycles employed by the World Congress organising committee which, I am certain, will be of enormous value to future organising committees or indeed anyone running a big event of this nature. Following on, Yoland Wadsworth, as President of ALARPM, opens her diary and offers us yet another view of the Congress, from her own experience. Yoland and Pieter's reflections are dotted with fabulous photos that really brought the whole event alive for me (since I was not there), but for those of you who did attend I suspect they will remind you of some wonderful memories past. To further set the scene, the next paper by Judith McMorland and Thomas Kalliath, was presented during the Congress to stimulate debate about ways in which we can learn together through networking.

This issue also features another three in the series of peer refereed papers presented at *Surfing the Waves of Change* conference in Coolangatta/Tweed Heads, Australia, 2003. In 'People' we welcome the new members who joined ALARPM at the Congress and we present a short profile on Anne-Marie Carroll, Lyn Cundy and Joan Bulcock who were conferred with Life Memberships at the AGM held in Pretoria, South Africa, 2003. Finally, under 'Membership information and subscription forms' we announce our new organisational membership subscription and invite like minded organisations to become Affiliates or Associates of ALARPM.

Reflecting on the Sounds of ALARPM 6th & PAR 10th World Congress 2003 in Pretoria, South Africa – A Personalised Lullaby for Four Drums
Pieter du Toit –

Introduction

True to my brain dominance profile (Herrmann 1995) being more right-brained, I intuitively decided to attend the ALARPM 5th & PAR 9th World Congress in Ballarat, Australia in 2000. There I at last found a niche for my way of conducting research and research training at the University of Pretoria, indeed ALARPM matched my preferred way of dealing with life in general. While attending the event I intuitively felt that offering to host the next Congress in South Africa might be a good idea. This was my visionary dream then – urged by Zuber-Skerritt's (2000:50) Figure 8 conceptualisation of the management process, in which vision plays an important role. This vision was, at that time, challenging me to get out of the box and do something I would normally avoid doing: Organizing!

After some initial committee meetings and a visit by ALARPM representatives, the bid of the University of Pretoria to hosting the Congress was accepted. It was decided that the Groenkloof Campus, home of the Faculty of Education, would be the ideal venue. The following visual gives a glimpse of the facilities:

Faculty of Education, Groenkloof Campus, University of Pretoria

But what I have learned from Barker (sa) is that no vision can be realized if it is not shared and if there is no buy-in from the vision community. Since initial discussions on the organizing of making the dream come true, the vision community that shared the vision consisted of an inter-institutional team of eleven inspired scholars of which only two were male, and two co-opted members, coming from five different institutions, some who were part of the Australia/South Africa Links Project. The team was supported by a wonderful group of students for whom the congress offered an opportunity for professional development. They received recognition in the form of a certificate stating that they were involved in the running of an international congress – a significant item to have on one's CV.

The organising team and student support group

The entire project was undertaken as a learning process, keeping in mind that the principles of action research had to be applied to the planning process and the course of the Congress as final end product. This approach ensured that all participants involved had to become self-regulated learners, they were offered the opportunity to plan what they would like to accomplish in terms of their individual portfolios, to executing the plan, monitor the process and assess the outcome.

Any participation in the project or input offered was subjected to the realisation that we had to act as role models to any interested party in all we had to do. Because of the epistemological nature of the Congress, being about action learning, action research, participatory action research and process management, the core of the vision highlighted that the Congress should be an authentic experience of action learning in action. As education and action research practitioners we realized that we had to practice what we preached.

We viewed the Congress as real-life learning event – for both organizers and delegates. Therefore, in the following discussion it will be referred to as intervention. This paper only reports the overarching action research cycle that was followed and not the individual process management done by individual team members in their respective portfolios.

Research problem

The practical problem the organizing committee was confronted with was organizing the first ever ALARPM congress in South Africa. The complementing research problem was to monitor the execution of the project in a scientific and accountable way.

Hypothetically it was decided to apply the principles of action research to the planning process as well as the course of the Congress, and to apply the principles of learning style flexibility to the design of the Congress. Therefore two sub-problems that emerged were:

- What action research process to follow?

- What theory on learning styles would best suit the congress as an authentic event?

Research design

The entire project can, according to Mouton (2001:158) be described as evaluation research. The focus of the research project is on evaluating the process of organizing and implementing the planned Congress. Mouton's (2001:158) description of this design type can be applied in an analogue way as follows: Implementation evaluation research aimed to answer the question of whether the Congress, as intervention, was properly implemented, whether the delegates as target group were adequately covered and whether the intervention was implemented as designed.

Characteristic of this design type is that it is empirical and it makes use of primary data such as informal interviews, feedback questionnaires and photos.

Research methodology

Action research has been selected as an appropriate research methodology. The definition by Zuber-Skerritt (1992:1) can be adapted for the context under investigation in the following way: Collaborative critical enquiry was conducted by the organizers as scholars themselves on their own organizational practice of the offering of the intervention and the problems experienced by delegates. As action research scholars, the members of the organizing committee took responsibility "… *to plan, act, observe and reflect more carefully, more systematically, and more rigorously than one usually does in everyday life; and to use the relationships between these moments in the process as source of both improvement and knowledge*" (Kemmis & McTaggert 1988:10). The planning was adapted where necessary according to needs. Improvements based on feedback from committee members, specialists, such as the ALARPM liaison committee, Congress Advocate (Prof Ortrun Zuber-Skerritt), members of the International; Support Group, the Congress Host (Prof Jonathan Jansen), colleagues, and congress delegates were made in terms of the organizing process, and the course of the Congress.

In the words of Cohen and Manion (1994:186) the short-term nature of the intervention made the action research "… *a small-scale intervention in the functioning of the real world and a close examination of the effect of such intervention*".

Action research

The action research model used for the purpose of this report is based on the work of Zuber-Skerritt (2000) and specialists referred to in the work of Hodgkinson and Maree (1998).

Context

Inter-institutional
Host: University of Pretoria, Pretoria, South Africa
Underpinning theory: Whole-brain learning (Herrmann 1995)
An African look and feel

Vision

A world-class Congress conducive to action learning
and active participation

Phase 1: Planning an innovative congress
- Planning a fertile congress that models action learning in action

Phase 2: Acting
- Hosting the Congress
- Keynote contributions
- Paper presentations
- Workshops
- Poster presentations
- Social events

Phase 3: Observing the effects of actions
- Personal observations
- Observations by delegates
- Feedback: Personal, questionnaire

Phase 4: Reflecting on the innovation process
- Self-assessment

Phase 5: Recommendations
- Regarding innovative and accountable new actions – 7th World Congress
- Own experience and future involvement in similar events

Figure 1: Action research model

Qualitative and quantitative feedback was obtained from delegates, colleagues and other specialists, and self-assessment was used for triangulation purposes. Quantitative data was also gathered and interpreted.

The organizing committee monitored the planning process and the offering of the congress in a manner that is sensitive to the diverse needs of all involved. Participants' needs in terms of their experience, knowledge and preferences differ. In this regard Gravett (2001:7) points out that "… in any group of adults there will probably be more differences than similarities, due to their varying life experiences". Therefore the intervention was designed keeping the diverse group in mind. Complementing this idea, the theory on learning style flexibility (as proposed by Herrmann: 1995) was applied in the design of different events.   This catered for the notion that in each group of adult learners there is an array of differences regarding preferences for styles of learning – influencing their experiences.

As far as constructing a learning environment that is appropriately contextualised and inspirational is concerned, it was planned to have a fresh and innovative approach to the Congress. The content and relevant outcomes (What) of the congress served as impetus to the underlying learning process (How), and the effective facilitation thereof. *Inter alia* it was apt not to only voice the importance of action learning – it was imperative to design events as learning opportunities in which the delegates could have first-hand experience of action learning and learning style flexibility in action.

All members of the organizing committee realized that they had to model leadership and leadership development in planning and offering the Congress. Leadership entails, *inter alia*, the value of self-assessment and self-monitoring. This has been accomplished by executing action research on the entire programme and individual portfolios.

The intrapersonal growth of the committee members comes to the fore in, *inter alia* being self-regulated, flexible and reflective organizers. For the purpose of this report the concept intrapersonal is interpreted as all those aspects dealing with the self. It implies those skills the organizers deployed to be distinguished as leaders. They were able to monitor intrapersonal aspects, amongst like others:

■ Self-regulation: Taking independently responsibility for developing and implementing their portfolios as sub-projects.

■ Learning style preference: Although the organizers prefer to work according to their own preferred learning style, they were willing to adapt and to develop skills that were challenging them to perform out of their comfort zones.

■ Reflective learning: By continuously reflecting on what they were doing and how they have monitored their progress and reflecting on the end-product, in a critical and scientific way, the organizers could adapt and plan for the necessary improvements. In this way they gave evidence of their active involvement in the managing of the process. An integral part of this process was the continuous self-assessment done by them.

■ Intrinsic motivation: All members of the organizing team contributed to the project in a very personal way – giving evidence of being intrinsically motivated.

■ Creative, critical and productive thinking were evident especially in the planning and implementation of the intervention.

By means of reflecting on their own portfolios, as well as past experiences of attending conferences and other similar events, the organizers came to the conclusion that there should have been less emphasis on content and one-way presentations during the Congress and a sharper focus on the learning process as such. Therefore they opted to invite

prospective participants to offer workshops and interactive sessions. This was done by means of the flyers that were sent out as a first call for contributions.

The organizers perceived the project as part of their ongoing personal, academic and professional growth. It was understood right from the commencement of the planning that assessment is an essential feature of the process. Despite the demographic difficulties in terms of the committee members coming from different institutions distributed throughout several provinces and therefore distances that were travelled, it was proposed that continuous assessment would form an integral part of the process.

For most of the organizers it was their first involvement in the organizing of such international event. They were not well grounded in the relevant knowledge, skills, values, principles, methods, and procedures.

Phase 1: Planning an innovative congress

I decided to use Herrmann's (1996) theory on whole brain learning to underpin the planning process for the entire intervention. The organizers were sensitized in a non-directive way to design the congress with the principles of catering for delegates' different preferences in mind. As chair of the organizing committee I also had to keep in mind that each team member had his or her own preferred way of doing – as is the case with all who would have attended the Congress.

The following table represents the model in a simplified way (Herrmann 1995:411; 1996:30; 1998):

Table 1: Thinking preferences in the four quadrants of the brain

The organizer/delegate with an **A quadrant thinking preference** may prefer to focus on:	The organizer/delegate with a **D quadrant thinking preference** may prefer to focus on:
■ Precise, to the point information ■ Theory and logical rationales ■ Proof of validity ■ Research references ■ Textbook readings ■ Numbers, data	■ Fun and spontaneity ■ Playful approaches ■ Pictures, metaphors, overviews ■ Discovering and exploration ■ Quick pace and variety in format ■ Opportunity to experiment
The organizer/delegate with a **B quadrant thinking preference** may prefer to focus on:	The organizer/delegate with a **C quadrant thinking preference** may prefer to focus on:
■ Organized, consistent approaches ■ Staying on track, on time ■ Complete subject chunks ■ A beginning, middle and end ■ Practise and evaluate ■ Practical application ■ Examples	■ Discussing issues with colleagues ■ Sharing, expressing ideas ■ Feeling based aspects ■ Hands on learning ■ Personal connection ■ Emotional involvement ■ Use of all senses

In summary, the Congress provided delegates the following:

■ A quadrant learning:

  □ A demarcated Congress theme and sub-themes:

  Learning Partners in Action

  - *Diversity in Learning*

  - *Reflections on Professional Development*

  - *Organizational Learning and the Future of Work*

  - *Participation in Social and Community Development*

  - *Legislative and Policy Issues*

- *Links and Partnerships*
- *Leader Practices*
- *Upcoming Researchers*

☐ Facts, theories and rationales underpinning the individual research projects reported by each presenter.

☐ In total 223 abstracts were received of which 185 were accepted and 141 were papers. The papers and 7 keynote addresses mainly fall in this category of learning preference.

☐ They could familiarize them with the content of each presentation by reading the book of abstracts and hand-outs.

☐ Confirmation regarding the quality of the content of the Congress was received from one of the keynote speakers: *Overall a fair amount of the conference content was at the cutting edge of developments in Action Research.*

☐ This type of learning was provided for by means of the reading material supplied, keynote addresses and paper presentations.

☐ After attending the Congress, all papers that had been peer reviewed were published on the Congress Website.

☐ Information on all aspects of the congress was regularly updated and sent to all who showed interest in attending or participating in the event – in electronic or hardcopy format.

☐ Part of this quadrant is quantitative and financial aspects. In terms of the registration fee and costs, the following feedback was received from a delegate: *I hope the conference was a financial success as I felt it was value for money.* According to the final financial report, the Congress showed a profit of R51198.16. In terms of figures as many as 272 delegates finally registered.
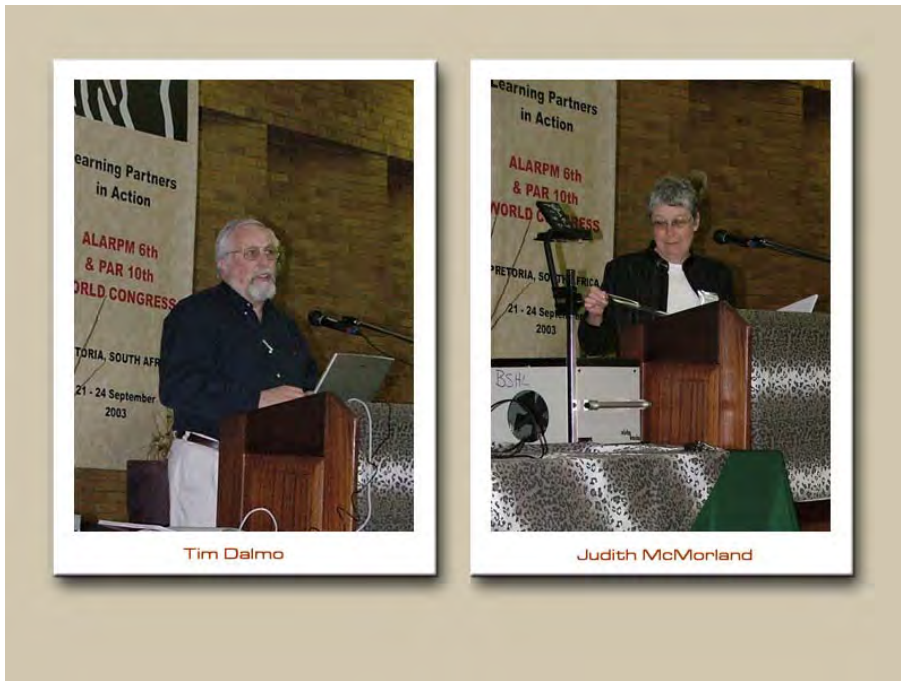
Tim Dalmau & Judith McMorland

A range of available facilities

■ B quadrant learning:

☐ Regarding the pre-congress process, the planning was monitored through continuous meetings, teleconferences with the ALARPM liaison committee (Prof Ortrun Zuber-Skerritt and Anne-Marie Carroll, the then ALARPM treasurer).

☐ An Agreement of understanding was signed by the host, Prof Jonathan Jansen.

☐ A time-frame was compiled but had to be updated regularly.

☐ The Congress was offered in an organized, well-structured fashion.

☐ It was ensured that the chairs of sessions adhered to time limits – one of the crucial elements of a well-run congress. Each chair received guidelines for chairing sessions.

☐ The venues for the different parallel presentations were all situated in one building.

☐ It was ensured that instructions for presenters were clear.

☐ The entire programme was presented with a specific beginning (welcoming cocktail party sponsored by the Mayor of he City of Tshwane), middle (three days of conferencing) and end (a final gala dinner, ending the social programme, and a feedback session as last presentation by the Congress assessor.

☐ Practical applications were evident throughout most of the presentations. Examples and case studies were used to help participants link theory and practice. In this regard one of the keynote speakers had the following to say: *There are a number of natural tensions here that always, in my experience at least, find expressions at ALARPM congresses. Most significantly there is the tension between theory and practice: field practitioners want to share their stories and learn from each other, but are less enthusiastic to hear*

about the theoretical and philosophical foundations from those within the academy (no matter the extent to which the academics themselves are also 'field practitioners').

☐ A registration and information hub had been created in the foyer where all participating entities had been represented. Changes in the programme had for example been announced on the notice board – helping the organized delegate to re-plan attending of sessions.

Registration and information hub

☐ Regarding administrative arrangements one of the keynote speakers had the following to say in writing: *Administratively this was one of the best organized international conferences I have attended.*

■ C quadrant learning:

☐ Presenters were invited to plan their presentations in such a way that active participation would be enhanced.

- Workshops were offered during which group discussions could be promoted. This promoted the sharing and expressing of ideas, complementing delegates with a preference for feeling based learning. Challenging the delegates with applications to their own practices ensured a personal connection. It was also experienced how interpersonal aspects come into play during group work. Unfortunately it was experienced that presenters do not favour workshops and other types of interactive presentations. In spite of all effort that had been put in to ensure lively workshops, some delegates referred to the fact that workshops were of mixed quality and that one presenter read his paper for 45 minutes. In total 30 workshops were offered.
- Some presenters made sure that there was emotional involvement during activities. Participants had to share feelings, they had to motivate each other, and at some stages they had to sing.
- Each session ended with a questioning session that promoted interaction.
- Active participation was promoted through offering delegates the opportunity of writing messages on a graffiti wall, painting on sheets of paper to visualize their contributions, contributing to the arrangement on the stage of the auditorium, building a Mandala and browsing the items offered at the African crafts market which connected them to the broader South African community.
- Because of the different activities it was ensured that the learning was invitational and user-friendly. The congress material was compiled in a user-friendly manner. Motivational songs and drumming sessions were all proof of the programme being invitational.

Sing-along and drumming sessions

- ☐ Tactile, visual and audio were the main senses to be stimulated.
- ☐ The whole idea of a caring approach was evident in the extent to which effort had been put in into detail in bathrooms, the foyer, exhibitions, the gala dinner, etc.
- ☐ Learning from each other, and sharing ideas in a non-formal way. The following feedback from a keynote speaker is apt: *And, as also characteristic of such international events, much of the stimulation and enjoyment at Pretoria was to be found 'between the lines' – in the corridor discussion, around the coffee pot, and around the dining tables.*
- ☐ The focus on the professional and self-development of the delegates and all participants also falls into this quadrant. The inclusion of a specific stream for upcoming researchers is also evidence of the organizers' view of the Congress being a developmental intervention. One of the E-mail messages received after the Congress reflects that

this was realized: *My two students (Christine Simmons and Cristine Moussi) and I enjoyed the conference very much. I've spoken with both of them this week and they are still raving about their African experience. Thank you for putting in all the effort to organize such an opportunity.*

- ■ D quadrant learning:
  - □ Fun activities were planned. Right from the start of the congress the drumming and singing sessions indicated that the organizers had more in mind than just an academic focus.
  - □ During some workshops participants played games and had fun in many ways. At some stage delegates were offered *medication* in the form of candies with a fun message as *indications and dosage*.
  - □ Poster sessions (14) gave participants the opportunity of holistic and visual thinking:

Poster sessions

- ☐ Many schematic representations were given, metaphors were used and holistic views been given by means of overviews.
- ☐ Characteristic of the entire programme is that the format varied from activity to activity.

It has been documented (Knowles 1990; Buzan 1991; Jensen 1996; Ornstein 1997) that effective learning takes place if the whole brain is involved in learning. Interpreted in terms of Herrmann's model, this presupposed that all four brain quadrants had to be included in the activities that were planned.

Cognitive functions are accommodated when learning activities are constructed to comply with a learner's preferred mode of thinking/learning. Cognitive functions are utilized and challenged when learning activities are constructed in such a way that the cognitive functions associated with all four quadrants of the Herrmann model are used. To ensure that the delegates could experience this at first-hand, they were challenged to become involved in activities that would challenge them to work outside their comfort zones. For the delegate who is more interested in structured and fact-based activities, the singing of a song might have been such a challenge. A variation in design and approaches facilitated learning in all four the specialized quadrants.

Phase 3: Observation

For the purpose of observation, different partners should be involved. Cohen and Manion's (Zuber-Skerritt 1992:139) idea of *multiple method triangulation* could be used to get a more holistic perspective on what had been planned. Triangulation can schematically be represented as follows:
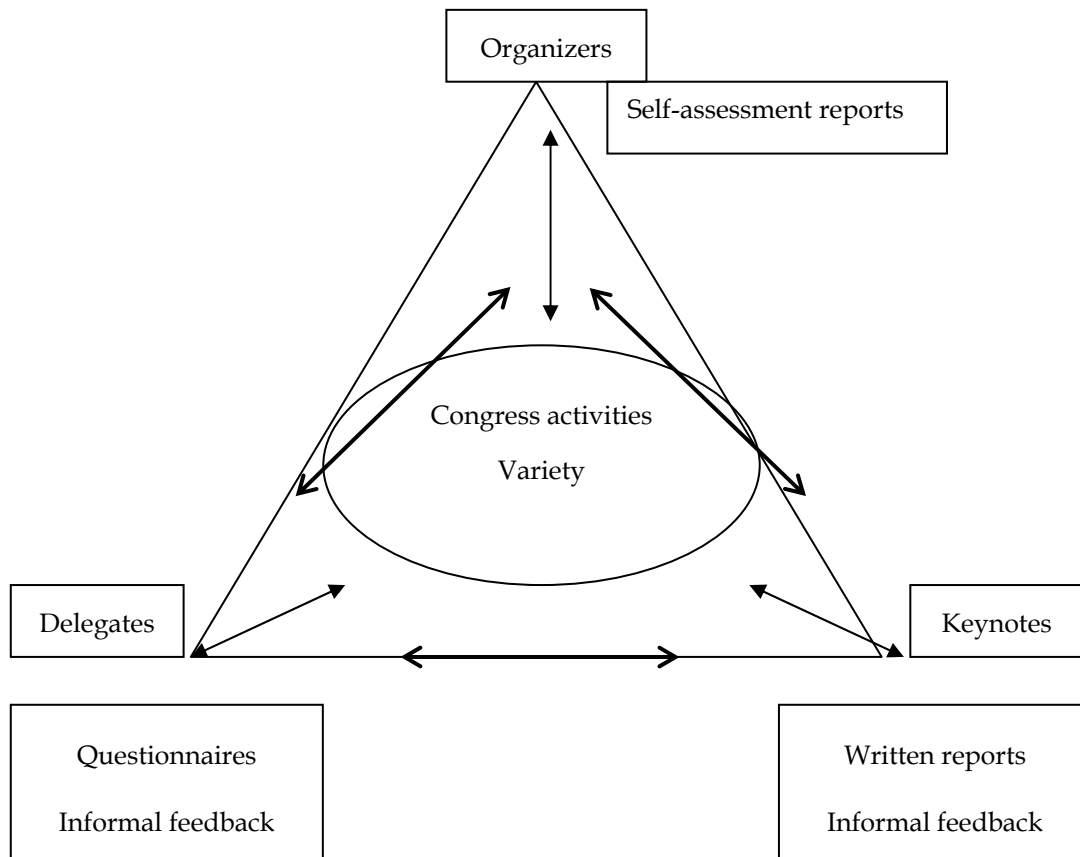
Figure 2:   Multiple method triangulation regarding the congress

Feedback from delegates was obtained in a formal way by means of questionnaires, and informal ways through discussions and E-mail messages. A questionnaire was used to obtain feedback from delegates for each presenter. This was given to the relevant presenter to be used for personal use. Another questionnaire was used to obtain feedback from delegates regarding the entire Congress.

The organizers' observations were multifaceted. They were in the prime position to observe delegates' reactions on experiences, and participation or lack thereof.

Each member of the organizing team was expected to write a short reflection report in which some observations are documented.

Phase 4: Reflection

Skills of reflection, according to Senge (in McGill & Beaty 1996:195) "... *concern slowing down our own thinking processes so that we can become more aware of how we form our mental models and the ways they influence our actions*". It also implies being aware of and taking responsibility for one's own development. Members of the organizing committee have met each morning to reflect, to discuss the day ahead, and to re-plan, if necessary. Feedback from the members indicated that they were unhappy with the fact that I as chair could not attend all these sessions, since I took responsibility for chauffeuring the keynote speakers. I have learnt that one should be more available for the committee and that a specific person should be assigned to look after the VIP's.

Intentional reflection was done by interpreting the outcome of the different partners' observations. For the purpose of assessing the congress, data has been collected by means of feedback questionnaires.

Multiple methods of data collection were used. Different modes of observation were utilised. Informal discussions with individual delegates and organizers provided valuable feedback.

For the purpose of gathering feedback from the delegates regarding their experience of the entire congress a semi-structured questionnaire, was used. Report on the feedback was given by the congress assessor, Seugnet Blignaut, in the very last session of the Congress, complemented by photos taken during the congress. The overall impression was that the delegates were positive about most aspects of the Congress. This feedback was followed by numerous E-mail messages received. The following are excerpts:

- *We arrived back to Maputo, travelling well, with warm memories and stretched minds after the invigorating experience of the Congress. You all are truly to be recommended for a job well done.*

- *Let me take this opportunity to thank you all again for a truly memorable event – it was certainly one of the best organized congresses that I have ever attended in thirty odd years of attending them. (Keynote speaker.)*

- *What stands out most in our minds are the commendable efforts made by the Congress organizers to expose the participants to the culture of South Africa throughout the Congress, the high quality of keynote addresses and several other presentations, the wonderful welcome and hospitality of the hosts, the excellent organization of the Congress, and the marvellous teamwork underpinning the smooth running of the Congress. (Keynote speaker.)*

- *The conference was my formal introduction to ALARPM. I found the conference very successful both (sic) professionally, culturally and socially.*

Some with good questions/advice:

- *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 congress.*

Even one message of three pages long with all sorts of complaints and extremely negative feedback on the entire Congress and pre-process received, had the following as final paragraph:

- *It might be thought that I did not appreciate any of the organization of the conference, did not get anything out of the experience and did not enjoy any of it. This is not so. I thought the support staff were excellent. The technicians were very helpful and certainly went the extra mile. The catering staff provided teas and coffees were delightful. Pity we were not served traditional African or Afrikaans dishes. Tessie Herbst and Marthie Harmse who introduced my workshops*

were very supportive and kind. Despite the fact that I had only two people at each of my workshops they were the right people and I shall be in contact with them in the future. I enjoyed the majority of the plenary speakers and found their contributions stimulating and valuable. The logo, bags we received etc were great. The craft exhibition/stalls were excellent and I made very good contacts for sourcing crafts for my business in the …

It is clear from the reflection by the organizers that they had never thought that their involvement would be so time-consuming. All of them except one have indicated that although they felt over-worked at stages, and though there was some disagreement from time to time the entire experience was worth the while. One member, who worked extremely hard all the time and who put in so much has indicated that nothing at all has been gained and no value has been added to her professional growth throughout the process – a great disappointment to me who was responsible for every member's well-being and growth.

Phase 5: Recommendations

■ A culture of action learning should be established at all our conferences/congresses.

■ It should be ensured at all costs that workshops presented should promote active participation.

■ If the Congress is offered as a joint venture with the PAR community more rigorous liaison with PAR practitioners should be done.

■ Some system should be put into place whereby presenters who do not attend and therefore do not present are not allowed to claim any dividend (for example research purposes) and the institution they represent are informed.

■ I regard every member of the organizing committee as an asset. I am convinced that their participation in the

event contributed to their professional growth and will assist them in becoming world leaders in their respective fields and in organizing of complementary learning events, such as conferences and seminars. One cannot express appreciation of their efforts in words!

I realize as an advocate of Herrmann's theory on learning style flexibility that one would never be able to accommodate everybody – especially those who would refuse to be challenged out of their comfort zone. My opening words for the Congress were in the form of a rhyme. It is encouraging to receive feedback also in the form of a rhyme. It makes me feel connected – still long after the event has taken place. I therefore would like to conclude with the words of Pip Bruce-Ferguson – to be read with the fading drumming in the background (listen!) and to put ALARPM 6th & PAR 10th finally to bed:

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.

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Learning to partner in action: The president accounts with a diary of personal experience of the World Congress of Action Learning, Action Research & Process Management (ALARPM's 6th) and Participatory Action Research (PAR's 10th)

– Pretoria, South Africa, September 21-24, 2003

Well!

It has happened.

The Great South African World Congress is over.

Three years in the making; a cast of hundreds doing the making; thousands and thousands of emails; meetings, meetings, meetings, and endless attention to detail later, it is done!

Like the last world congress in Ballarat Australia - we can say "It has been achieved"- and without major act of terror or event (though yes, some of us did see what some of the local South African fears about violence were all about – but on the reassuring side was the sheer swag of kind folk offering care-full response beyond the call of duty).

Here's my first message, on Ian Hughes Congress website, giving a flavour of the congress's commencement...

Greetings from Day One - Monday

Date: 22 Sep 2003

Time: 21:49:08 +1100

After our very grand and rather formal sit-down catered Civic Reception last night, we have arrived this morning to the sound of drumming, drawing us into a thriving hub and marketplace even at 8.00am, with people registering, the starting of an artwork/mandala to describe our cosmos, and signing up to join ALARPM! (The ALARPM table is a good place to meet people :-) The many Organising Committee members are wearing distinctive animal print vests that pick up the visual theme - which is also in the signage, banners, program and other documentation. There are spectacular African flower arrangements with porcupine quills and bush turkey black and white spotted feathers - all given without loss of life, the florist assured us!

Everywhere else there are small arrangements of seed pods, lemons, African print fabric and miniature woven items - even in the women's toilet! …and in the Hall of Residence where many delegates are housed. With anticipation we enter for the welcome and symbolic joining of the PAR and ALARPM Congresses with the Local Organisers and the 5 participating host institutions (cups of water are to be pooled together in a traditional black African cooking pot) - to be followed by the first keynote address...

p.s. Our context is a modern city - the City of Tshwane, a new name for Greater Pretoria in the "proudly new South Africa", about 50 km from Johannesburg, characterised by unbelievable contrasts between wealth and poverty - now said by many to be unrelated to the "mere accident of skin colour". As wealthy black Africans join wealthy white Africans so also it is said poor white Africans join poor black Africans. These messages have come to us from the highest occupational levels which are now, by law, also being increasingly and largely occupied by majority black Africans.

Bye for now!

And so it went on apace for the next three days. In fact I took some photos at the start – and then not again till the

Congress Banquet near the end, so hectic was the pace – at least for me as la presidenta, with 14 official activities and presentations on my "To Do" list. I will report the Congress as I personally experienced it and also to account to the ALARPM membership and Committee for sending me.   My reflections constitute early and rather immediate indications, amidst all the other elements of this immense hive of activity.

Set up the ALARPM table in the reception/marketplace area

It was enjoyable getting this happening and making it look good (with balloons that had welcomed me at the airport[1] and zebra print fabric (which I'd SO wanted to souvenir at the end!). For me personally it was great being there a couple of days beforehand to ease into it all, help prepare the ceremonies and official speeches, and get to know the large local organising committee, putting faces to names that had, up till then, been only (and rather disembodied) in email messages. It was also good having so many ALARPM Committee members (eleven) at the congress meeting face to face. As we 'scale up' to be truly international, it is only really at these overseas meetings that we often get to connect at a more embodied/experiential level.   It's the way many of us have been able to forge connections that have, over the years, given us true Wengerian 'communities of practice'.

As soon as ALARPM folk began arriving it was a lot of fun as the table became a bit of a meeting place as I, then Pip Bruce-Ferguson and Judith McMorland flew in from New Zealand, and Deb Lange from South Australia, and finally Susan Boser from the USA, each 'personing' the table and signing up new members. Thirty-three new memberships

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[1] Brought by two young Afrikaaner friends of my niece who met me and took me to eat at The Happy Hunter. Oh gee, did I really eat Ganesh the elephant and other wild game? Just a little I'm afraid, perhaps to connect with their (unfortunately passed on) spirits...

flooded in. Anne-Marie Carroll had sent over a swag of Journals and Directories, so it was rather like being Santa welcoming new members with a journal and directory on the spot …and a South African chocolate :-) We all missed Anne-Marie (and Lyn Cundy – who had accompanied Ortrun Zuber-Skerrit over to do the original reconnoitre when Pieter du Toit first offered the possibility of a South African world congress).

Congress Advocate Ortrun Zuber-Skerritt, meeting and greeting delegates and organisers in the reception/marketplace area

Speak in response to the Mayor at the very formal sit down Mayoral Welcome Reception

I did some 'local knowledge' homework, asking the young black African woman down the hallway from me in the Hall of Residence what language I should use to greet the Mayor ("oh yes I know exactly, he's a relative of mine!' she said), and swatting up on the various other relevant languages as well as pronunciation of his name; it being a mostly black Council that was also currently running into controversy over changing the name of Greater Pretoria to Tshwane …only to find myself at the reception responding to a white

Afrikaans council officer sent in his place! Nevertheless, aware of the somewhat anomaly of an overwhelmingly white academic congress talking about learning partnerships and participation in a majority black African country (historically famous for its PAR), I expressed solidarity in my speech regarding our own home-country action research/action learning and other endeavours of a comparable nature with our Indigenous communities, working with issues of inequality and injustice …only to be assured by the black Dean of Education that – less than 10 years after the end of Apartheid – skin colour was simply 'not an issue' any more in the new South Africa.

Speak at the opening ceremony

A second contribution came by the energetic Dean of Education, Jonathan Jansen, which many found inspirational. Then we did indeed pour three cups of water into a traditional black African iron cooking pot, signifying the coming together of the two world congresses and their communities, ALARPM's 6th and PAR's 10th – and thirdly with the local South African context and all the participating sponsor institutions: the Business School of the Netherlands (in South Africa), Technikon Northern Gauteng, Technikon Pretoria, Technikon Vaal Triangle, and the University of Pretoria (where the Congress took place). All in perfect time to enable Congress Advocate and active convenor of the congress International Support Group, ALARPM founder and Keynote speaker Ortrun Zuber-Skerrit with Tom Kalliath of New Zealand, give the first session of the Congress.

A PAR Working Lunch

The organisers had beautifully catered for a sit-down lunch for 20 although unfortunately some key people did not realise it was on as a gremlin had omitted it from the final version of the program. Nevertheless it was a good start to an otherwise badly-underrepresented community-of-practice despite strenuous attempts. We described our varying areas of work and got a glimpse of each other's parallel efforts all round the world and met Masebala Tjabane, the PAR liaison member of the Pretoria organising committee.   The meeting kick-started conversations that continued between us for the remainder of the congress.

Strategic Questions workshop

Just an offering from me of some thinking about a question sequence – drawing on the work of Fran Peavey – which rather comprehensively addresses the kinds of questions that mark off an AR/AL/PAR-type action inquiry from a standard social research one. We tried them out in practice in a workshop that usually goes a bomb in the community, effectively showing the move from 'what is' to 'what could be', but it seemed not to connect so well with sophisticated AR practitioners! Need time to reflect on that one!

Guest presentation paper

Went straight from the workshop to my paper which had been scheduled end-on. I thought I'd be incoherent under the circumstances! - but a packed room of people were 'in the groove' re thinking about researchers and researched from the previous session – and responded with interest. I presented for the first time the unfolding wisdom from two sequences of PAR/AL conducted over more than 10 years, each coming from opposite 'sides of the table' – one from human service-user' and the other from human service-providers, each trying to crack the puzzle of human services

wanting to hear from their consumers and simultaneously *not* wanting to… and, more importantly, what to do about moving forward through and with this paradox.

Then for at least two sessions I got to go to others' presentations (and to eat traditional Afrikaans milk tarts for morning tea!). I specially enjoyed the (albeit rather colonial patriarchal) reference to qualitative research as 'one man, one veldt, and one year'!   I found I came all the way from Australia to at last meet fellow Australian Liz Mellish and attend her excellent workshop on appreciative inquiry and change (well Australia *is* the size of Europe!); and Coyan Tromp's and Rudi Roose's exciting glimpses of Dutch AR (certainly looking forward to the 2006 World Congress in the Netherlands!).

Poster presentation

I brought from Australia a poster about the work that Merinda Epstein, myself and a team of about 25 consumers and staff in acute psychiatric services had carried out that stands as a good case study of a 'whole systems' approach to 'scaling up' AR from a single or micro case (such as a hospital ward) to an entire system (such as all Statewide services and even national mental health policy). An exciting offshoot has been discussions with Susan Boser when she was at Cornell – and now at the congress with Danny Burns from SOLAR in England (the power of co-locating congress participants in the same accommodation! – thanks Pieter) – about how they too have had this experience. I specially liked Susan's saying 'We were a long time doing this'. Sounded like a book title to me! It specially captures the necessary condition of 'over time'… lots of it. In some ways it seems to run counter to AR wisdom that we do not generalise beyond the 'single case', but our take on this is that we can and do network the information about our particular experiences with/to others in other and increasingly widespread parts of a 'single case system' (though never totally bounded). In this way we *offer*

possibilistic rather than *deliver* probabilistic/predictive accounts – accounts that others may take and try out for themselves, in ever-widening ripples of communities-of-interest/practice.

Indeed one of the themes I heard coming through over and again at this particular congress was that of how the individual, the group, and the organisational or institutional mirror each other 'up and down' or throughout a social world. It is a theme playing itself out in a 'new epistemology' which sees the inner and the outer, the I/me and the thou/other, the objective and the subjective as mutually constitutive in a new eco-metaphor of the 'living-interdependent-system' - rather than an old paradigm system-as-separate-components of a machine metaphor (even while both these metaphors may co-exist as pragmatically useful accounts for particular uses and purposes).

Yoland Wadsworth, ALARPM President (Australia) and Susan Boser, ALARPM Vice-President (USA)

Action Research journal board feedback and ideas meeting

Peter Reason called together those of us who were at the Congress to reflect (as we do!) on the journal to date. The consensus seemed to be a feeling of pride in this new deliberate attempt to occupy intellectual territory within the academy – increasingly a site of AR teaching and research, as other opportunities for thoughtful reflection diminishes elsewhere. Not that we are not aware of the painful paradoxes in this as well – already well experienced by a feminist movement that moved into the academy and became transformed into an intellectualised and rather disembodied-from-ordinary-women's practice 'women's (or even gender) studies'. Even Peter's popular and masterly keynote about criteria of quality in action research (for use in selecting papers for the journal) carried the same reificatory risk of any conceptualisation, categorisation or theorisation that 'fixes' things (as whatever)… as always requiring a new effort to unfreeze the hard-won newly-frozen. No way round this one as far as I can see! …just more cycles of AR/AL/PAR/PM to immunise us from the chance of ossifying… :-)

Chair ALARPM Annual General Meeting

By now I was starting to fade a little but with secretary Pip Bruce Ferguson's able 'steerage' we moved rapidly through a barrage of 15 items that represented a year of incredibly hard work by a large number of people on the ALARPM association's committee of management – some of the most hardworking of whom were sadly absent as the cost of a trip to Africa proved prohibitive to so many of us. Nevertheless we presented 3 well-deserved *life memberships* to Anne-Marie Carroll, Lyn Cundy and Joan Bullock (see 'People'), thanked the members of our local sub committee of ALARPM (the Pretoria congress organising group), presented a financial report that indicates in what excellent shape the efforts of

treasurer Anne-Marie Carroll (and others) have left the organisation, and an annual report that indicated steady but slow progress on all other aspects of the organisation's development (including the website and internationalisation of the association's operations). In relation to the latter we put through an important Constitutional change – which was to add the category of *organisational* membership (as affiliate or associate) – as well as a change to our financial year that will help the treasurer. It is a truly big step for ALARPM to be able to have organisational members in its move to offer itself as a network/er of other existing AR, AL, etc groups and networks (and in preference to establishing top-down, colonial-style, high-maintenance bridgehead branches worldwide).

Congress Banquet (present thank-you gifts)

As I wrapped more than 20 gifts and wrote cards, I thought of all the detailed tasks undertaken by the dedicated members of the Pretoria congress organising committee. It is easy for congress-attenders to take all such efforts for granted – particularly when they remain rather invisible. But who can forget the candle-lined fairy path to the banquet hall… or the gorgeous zebra print congress satchel bags; the annotated historical and local contextual notes for the guided bus tour to the Mayoral Reception; the musical starts to each session led by the gentle but firm Tinus, or the little pill-containers, filled with pink musk or coloured sweets (which I am munching at last, as I write this in Canberra Australia!) and distributed in plenary as bits of pick-me-up fun, with messages such as:

Tend to forget? VITA-MIND is the answer

To ensure payment of ALARPM membership fees: Dissolve 1-2 tablets under the tongue, three times daily

Complete course before [the last day of Congress] 24 September 2003!

Or, Action Learning Energizers

For optimizing creativity

Dosage: Take 1, three times per day between meals!

Or, who can forget all the efforts of the accommodation people to get things right for people in the face of the intricacies of modernist bureaucracy; or the highly-detailed running sheets of people-doing-tasks, the full team meetings at the crack of dawn each morning, and at the banquet itself – the breathtaking attention to detail: the Masai-made beaded metal serviette holder gift for each banquet guest, the striking zebra pattern motif fabric on the chairs, tables and candles, and the lofty tall vases of bird of paradise flowers on every table; and the gifted black youth orchestra Amacademy. (It was bewildering that so many people went home so soon after eating, after so much effort. Only 'the real stayers' got to revel in dancing to the DJ's disco music!).

The organising committee at one of those crack of dawn meetings

LaDon James talking with Pip Bruce Ferguson

For all this and more, Ortrun Zuber-Skerrit and I presented to the 20 plus organisers Australian Indigenous gifts and gemstones & seed pearl jewellery, plus bookmarks (for the abstract and paper readers!) and Aboriginal 'journey maze cards' symbolising the Congress journey they had all undertaken for the benefit of the international AR,AL, PM & PAR community. The key collective gift – accepted by our self-effacing friend Pieter[2] – comprised a large hand painted boomerang, fittingly depicting 20 people seated together (obviously at a congress-organising committee table!).

First informal meeting of the new ALARPM Committee

At 8.00am the next morning the newly-elected ALARPM committee met informally for the first time and to get on with the business of making sure there'd be future world congresses – including with a more active PAR presence – as well as honouring our founder Ortrun with a special new

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2 Whose own diligent efforts for all of us in the guest houses, will always be remembered with our grateful thanks

title. This latter is a work in progress but contender names include: Kuia (Maori for revered older woman), Queen Mother (a South African term for a family/tribal leader), Big Kahuna (Asian Pacific term), High Priestess (Celtic) or the favoured Clan Mother (Native American, and possibly with a nod towards Scotland).

We particularly discussed the difficulties of staying true to our unique ALARPM vision of being by and for all the 'strands, streams and variants' practicing this shared methodology. While we struggled at the congress to keep PAR in the picture (and not having attracted many of those working under often extremely impoverished and politically stressful conditions of inequality and injustice), we also received criticism that this was an overly academic/higher education-focused conference, not attractive to people coming from private and big business either. We frequently fall between many stools while trying to bridge all – from people new to it to people who are the most experienced in the field – or trying to attract people in widely diverse *substantive* areas (such as agriculture, architecture and engineering, as well as community development, religion/spirituality and art) who then find only a handful attend a paper in their specialised area. On the other hand we heard of at least one person from private enterprise who was delighted to find our congress, contrasting it with more narrow and highly formulaic action research meetings in the commercial sector.

Chair and speak at PAR Symposium (including read Anis Rahman's paper)

The PAR symposium was attempting continuity with a discussion commenced at the previous two world congresses regarding the 'problems' of success and co-optation. Further trouble for our PAR attempts came in difficulties finding enough of a space in the program (solved by the organizers), and in the event losing key individuals from the discussion-starter panel – including Orlando Fals Borda through illness

(whose opening ceremony message had been read by PAR pioneer Marja Liisa Swantz). Marja Liisa had just returned from Tanzania and reported briefly on some of the changes she had observed there over several decades of involvement. Jethro Pettit from the Institute for Development Studies in England, whose colleagues from all over the world including Africa had so strongly opened the last world congress on the topic of a UN-funded poverty program, reported on the difficulties associated with that a number of years down the track. And I reported on the paradoxes of success and challenge as action research has been taken up Australia-wide in youth, family and community-strengthening national government programs (both achieved *and* potentially professionalised). Jethro described an interesting twist to the usual academic we-don't-like-AR story, when his own faculty was gloomy about an AR project getting research funds – but it receiving support when it got to a committee, which had representatives from our colleagues in the action-learning strand! 'We love AR they said!' Perhaps it's a pincer movement from all our 'strands, streams and variants' – when they all meet we will have critical mass!

I also, in way of introduction, read Anis Rahman's very interesting reflection on the roots of participation thinking in India – going back to the efforts at the time of independence struggles of philosopher-landlord Rabindranath Tagore. While the first part of the plenary was well-attended, we had unfortunately a rather formalistic and white European set of presentations. The real stuff of our approach – the round table discussions following the 'discussion-starters' – took place at the same time as other presentations including some outstanding PAR community-based ones. Nevertheless 16 of us discussed a number of issues arising, and in particular assessed the relative merits we are experiencing in our differing contexts of the 'move to the academy' of AR (e.g. seen positively by some African colleagues, and as being more contradictory by some in western urban settings).

Speak at the Closing Ceremony

After the video reporting some initial reflection and evaluation, we sped through a final upbeat closing ceremony – with the three cups of water being poured out of the African pot – now suitably alchemically transformed by our 4 days of deliberations! – back into the cups of the three participating triumvirate on behalf of their constituencies: local Congress South African colleagues; and worldwide ALARPM and PAR colleagues. In evidence of the alchemy our white Finnish PAR colleague Marja Liisa Swantz transformed herself/was transformed (highly symbolically) into our black Kenyan PAR colleague David Almudavi! Finally we ended with a mock Olympic-style changing of the batons in a relay race – run in slow motion across the stage as Pieter du Toit handed something resembling a baton to Ben Boog on behalf of both a hoped-for next PAR/ALARPM world congress in Mexico in 2005 and an ALARPM/PAR congress in the Netherlands in 2006 – and we all followed them out of the auditorium to be refreshed by lunch en route to our respective homes and life-work.

Yoland Wadsworth with David Almudavi from Kenya, Cornell PAR network, and ex-Engineering at the University of Melbourne

Visit Kenya with Kenyan/Swedish colleagues

Finally I mention some further highlights that resulted from some post-congress travels. I make mention of these because this was an experience echoed by many of those 30% of we attenders who came from overseas.

Some of us were able to accompany colleagues - often met through previous AR/PAR meetings – to their various African countries; or to undertake tours of settlements, townships or rural areas, which we found often hugely further enriched our knowledge 'of self and other'. Public health issues, for example, literally 'live' when you directly observe cars without catalytic converters (dense city pollution in Nairobi), the fragility of poverty-line existences (of drivers of ancient battered cars on deeply rutted 'roads' in Kenyan highlands) or intestinal infection (unrefrigerated butcher shops in J'Burg settlements), low immune response and general sickness (taboo mention of sex-related illness or the exercise of male power) – or the richness of an economy destroyed (exploitative international markets) where people are forced to replace good subsistence farming with monocultures – and then end up harvesting coffee for no income (repeat *no* income). At the same time one's despair-at-a-distance is also modified by direct evidence of people's resilience, the beauty and fertility of much of the land, the growing levels of education and housing, and people's continued exercising of community capacity and taking control of once-colonised institutions. I came away with a much more balanced picture of material deprivation *and* human energy, the exercise of coercive power relations *and* the exercise of joy in community.

Overall I would conclude this was a valuable world congress for many many reasons: For the sheer volume of detail in care taken, the number of presentations from which to choose, and – after worrying about the security of the environment (accommodation, transport etc.) - finding there

was very little to worry about on this count; that the South African economy is in autonomous and good shape for a revival of both pride and productivity – and most particularly for me - having several people come up and say they had just started or are part of a new action research network in their country. Plus the Cornell PARnet was up again! Great news!

For a group of people who had never organised a national conference together, it was an extraordinary undertaking to organize an international congress – and an achievement that should give heart to others who might feel they would be unable to do this too. There will always be blips and gaps and things we regret – even quite major ones. But overall a most successful undertaking was achieved.

For the next world congress – and indeed for ALARPM itself – some of my conclusions and learnings are that we must seriously attend to working out how to continue to always organise and network across the whole field of our shared endeavour, and in particular have the PAR colleagues take their rightful place in that. I think we must seriously experiment with alternatives to the paper-after-paper style of conference presentation; ensure that we include in all future world congresses pre-congress paid workshops to both maximize local people's flexible access to experienced international practitioners *and* utilize an extra source of income to take the pressure off sponsorship-seeking; and always include a meeting place/refreshment area available throughout the congress for people to take up Dean Jonathan Jansen's injunction to 'avoid going to sessions' and instead benefit from the real congress of informal meetings :-)

I think we should repeat the excellent 5-10 minutes space between sessions to allow for movement between venues, have book displays/sales, and have active workshops after lunch rather than papers! Can we reinstitute the affinity groups so people get a spot to process their congress experience with others. We should plan and advertise a

goodly proportion of low cost registrations and find more sponsorships for low income community people.   And how can we democratically identify really good keynote people? What can we do instead of having so many hundreds of presentations with only a few people attending them? (One person was 8th of 8 sessions, had travelled from another country, had put a lot of work into preparing their paper – but was pleased to get 10 interested attenders. Another chaired a session and reported a truly amazing presentation involving a medical educator, a drama person and a psychiatrist – but only one person attending. Another first-time attender reported an 'absolute wealth of things to go and hear'.) There might also be a serious role for 'information-networkers' to constantly watch for lost threads and continuously keep the feedback loops happening (e.g. after the first contribution to the website contact for the world organized by Ian Hughes, there were no more as perhaps there was no one to encourage or alert delegates to it; there seemed to be an official photographer but it was not known whether they would produce photos we could buy; Deb Lange's workshops to design the opening was held after the congress commenced, and it was heartrending to have to people turn away at the door to the Congress Dinner because they didn't have a ticket [which they missed knowing they needed to be given] and then have so many tables empty). Finally, we need to utilize multiple methods (I think at least 5!) for receiving feedback and reflections from attenders.

However none of this is of any value unless we have a mechanism in ALARPM for the accruing of the ideas, methods and learnings from all the world congresses. We are still without a Standing Friends of World Congresses Council – which I think should include at least one organizer/evaluator from each of the previous 6 congresses, plus friends and creative process facilitators like Deb Lange.

Thanks again to Pieter Du Toit and the 20 South African organizers, the Congress Advocate Ortrun Zuber Skerritt and Anne-Marie Carroll and the International Advisory

Committee and others – all for services beyond the call of duty. We are greatly indebted to you.

Yoland Wadsworth
2003-2004 President – ALARPM

Action Research Program, Institute for Social Research,
Swinburne University of Technology
&
Integration & Implementation Sciences, NCEPH,
Australian National University

Attachment 1: Welcoming address on behalf of Father Smangaliso Mkhatshwa Mayor of the City of Tshwane
- Martha Venter

Welcoming address by Martha Venter, on behalf of Mayor Father Smangaliso Mkhatshwa of the City of Tshwane at the Civic Reception on the occasion of the 6th World Congress on Action Learning Action Research and Process Management (ALARPM), being held in conjunction with the 10th World Congress on Participatory Action Research (PAR), in the Hannes Redelinghuijs Hall on Sunday, 21 September 2003

South Africa is a country whose citizens have always been hungry to learn. Our history shows that all our people – of all cultures – have been prepared to sacrifice much for the right to learn. We are a people who often had to struggle for education against tremendous odds. You see, we knew instinctively that knowledge means power and freedom.

My municipality's vision for our city is that it should become the leading international African capital city of excellence that empowers the community to prosper in a safe and healthy environment. Education plays a critical role when it

comes to empowering people. In South Africa, we have a terrible backlog as far as education is concerned, and therefore every effort must now be made to provide people with opportunities to be educated. We cannot always make use of the traditional methods. The world is changing and practical education is becoming essential. Hands-on experience is what enables students to make a contribution at grassroots level in their communities. This is, after all, where they live and this is where they should contribute to the development of their communities.

The City of Tshwane is therefore more than willing to be associated with the principles of action learning and action research. We support this way of leaning, as it provides an opportunity for learners to learn from their working environment, to understand their working environment better and to have an impact on their environment right from the beginning. In this way action takes place while learning takes place and we benefit much sooner.

The City of Tshwane is recognised as the education capital of South Africa. The city's expertise in the fields of medicine, research, technology, education and training is ascribed to the numerous institutions that are based here, giving it a competitive edge. These include the University of Pretoria, the University of South Africa, the Technicon's, the Medical University of Southern Africa, the Pretoria Academic Hospital, the Eye Institute, the Council for Scientific and Industrial Research, the Human Sciences Research Council, the South African Bureau of Standards, and the South African Nuclear Energy Corporation. At this point I would like to congratulate and thank the Faculty of Education of the University of Pretoria for arranging this Congress.

I also wish to congratulate our guests on choosing South Africa and more specifically Tshwane as their destination. I read recently in the media that Tshwane is the happiest city in South Africa. So expect to see many cheerful, happy people during your stay. Do make a point of visiting some

of the excellent sites in our city. You could perhaps include a visit to one of our world-class malls, or take a trip to a township and really experience the atmosphere of Tshwane.

Tsliwane is the capital of South Africa in more ways than one. We are the diplomatic capital with over a hundred embassies and foreign missions, we are a business and investment capital and we are acknowledged as leaders in the fields of technology, electronics, manufacturing and much more.

Ladies and Gentlemen, I know that these congresses will be an enormous success and that we can expect to see all of you as our new partners in education.

Attachment 2: Response to the Mayor's Welcoming Address on behalf of ALARPM
- Yoland Wadsworth

Dumelang[3]

Saurubona[4]

And Ngiyabonga Kathulu[5] - to you Martha Venter, on behalf of Mayor Father Smangaliso Mkhatshwa, for your welcome to us to the City of Greater Tshwane and for this Civic Reception. It is a great honour and a pleasure for all of us to come here for our world congresses of Action Learning Action Research & Process Management and Participatory Action Research. It is also intensely significant.

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[3] 'Hello' to a group, Sotho language

[4] 'Greetings', Zulu language

[5] And 'thankyou very much'

Our field – as indicated by our names – is a broad one, and, like your city, characterised by both its own great diversity and the great issues of difference with which we all engage. While many of our international and local congress participants have white, European and academic backgrounds, most of us are also working with our own groups and communities struggling to have local knowledge and truths recognised; most of us also work against the automatic assumption of a priori expert knowing; and most of us work across differences of people and their standpoints, within complex environments, and for change for improvement.

To come here to our meeting with the theme – selected by our esteemed South African colleagues of 'Learning Partners in Action' (Baiedanke[6] to them for this) – and knowing as we do, the conditions of equal exchange and mutual respect that are necessary for the expression of people's truths, and for learning and for action for change – we are struck by what you have achieved and are continuing to achieve in moving from a deep culture of difference and inequality to a situation expressed in the deep wisdom of your City of Tshwane civic slogan *'We are the same'*. In this city – historic site of the powerful past exercise of the restraint of the truths of so many – you and your Council, and President Thabo Mbeki in his office in the nearby Union Building that we have just visited – are remarkable testimony to and signs of what is possible.

In our field we take our place alongside you as we all struggle with the delicate dance to use power for the self-determined good of each and of all, and to create energetic fields that are non-coercive and achieved through dialogue. During the Iraq war we were reminded by commentators that 'the first casualty of war is truth' – and thus the first

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[6] 'Thankyou', Afrikaans language

condition for truth is peace. Hence the importance of the 'PM' in ALARPM – that of Process Management, which - along with the AR and the AL and especially the 'P' for Participatory in the PAR – is the warrant that there will be as we say in this work 'Nothing about us without us'.

But in this delicate dance of 'power for' inner strength rather than 'power over', I am reminded by my experience of Ladysmith Black Mambazo that the rhythms for this dance can be 'proudly South African' with a very strong drum heartbeat! So this augurs very well for all of us!

In closing may I say that I have moving memories of Nelson Mandela at our 'Parliament of the People', the Trades Hall Council in Victoria my home state – when he came to thank trade unionists for our contribution to your efforts to find your own truths and reconciliation of the hitherto great inequalities of learning, knowledge and material practice. I myself tonight wear the messages from our own Indigenous peoples in relation to our parallel efforts – 'Reconciliation, it's up to all of us', and the black and white hands shaking, over the generous words of the Kulin Nation language saying, in response to our apology for past wrongs – Gnokan Danna Murra Kor-Ki – 'Give me your hand my friend'.

So now tonight is a new moving moment as we attend your reception for us here in Tshwane – 'the educational capital of South Africa' – and we thank you for receiving us from all over the world to meet for our World Congresses for the next three days to focus on our science that is 'of the people, by the people and for the people'.

Again, Ngiyabonga Kathulu

Thankyou very very much, on behalf of us all.

Learning together through networking – Judith McMorland & Thomas Kalliath

This paper was presented at the ALARPM 6th & PAR 10th World Congress, University of Pretoria, South Africa, to stimulate debate in a conference setting about ways in which we can learn together through networking.

Abstract

Arising from the stimulus of the an Organisation Development World Congress Tom Kalliath set out to establish the New Zealand OD Network of practitioners and academics in New Zealand with the purpose of improving the OD capability in New Zealand. The stated mission of NZ OD Network was to provide a forum for OD professionals to (1) share innovations and best practices in OD, (2) network, provide and receive support, and (3) promote OD as an effective means of helping organizations function more effectively. This paper reports on work in progress to assess the effectiveness of the NZ OD Network as an action learning process. Using evaluative data from participants attending the 9th conference, and a broad analysis of abstracts of papers presented in the eight preceding conferences, we present some theoretical and practical reflections on the value of a professional network, and the organisational forms needed to sustain on-going learning. Based on our experience in establishing the NZ OD Network, and other related professional associations, we discuss a number of network characteristics that may be in creative tension with one another. Specifically we draw conclusions around the need for requisite variety, requisite

connection, and issues of attraction, affiliation, and organisation.

Introduction

This paper reports on work in progress to assess the effectiveness of the NZ OD Network as an action learning process. Tom Kalliath attended the Dublin World Congress on Organizational Development in 1998 and was stimulated to initiate an OD Network within New Zealand. The first meeting, of 14 people, held at Waikato University in February 1999 resolved to provide a forum for OD professionals to:

(1) share innovations and best practices in OD;

(2) network, provide and receive support; and

(3) promote OD as an effective means of helping

   organizations function more effectively.

Four years on we reflect on the establishment and growth of this network, and seek to evaluate the extent to which the stated objectives have been met and the profession enhanced.

The NZ OD Network Conferences

Conferences are held twice yearly in the two main cities of New Zealand – in July in Wellington and in November in Auckland. Wellington is the political capital of New Zealand, and is dominated by public sector and governmental agencies. Auckland is the commercial centre of New Zealand. Over one-third of the total population of four million live in the Auckland-Hamilton conurbation. The results of the evaluation survey administered at the end of the 9th Conference in July 2003 in Wellington, which serves as the basis of our discussion, may not be typical of the Auckland context. Further validation of these results will be needed to establish a more complete picture. However, the

pattern of participation identified does serve as a useful starting point for a wider discussion on how we learn together through networking. In this paper we have focused on identifying some of the structural and processual factors that may need to be addressed in maintaining viable professional affinity networks that go beyond mere transactional engagement to foster collegial and collaborative learning.

Survey results

Table 1 provides a summary of the demographic characteristics of our sample.

Care should be taken in interpreting these results. Most participants were women (62.5%). However distribution of gender differences across the other characteristics is not specified.

Table 1: Demographic Characteristics of the Sample (N=40)

Age	25-34 15%	35-49 47.5%	50-64 37.5%	
Gender	Male 37.5%	Female 62.5%		
Occupation	Academic Staff 5%	Consultant 30%	HR Staff 17.5%	Other 47.5%
Sector	Public 47.5%	Private 27.5%	Not-for-profit 10%	Other 15%

The table does not, for instance, tell us how many of the 47.5% of public service participants were women, nor what age group(s) were so represented.

Of interest is the small number of participants in the first age bracket (15%), suggesting that people in mid-career, rather than early career, are attracted to NZOD. However the results from another question show that more than three-quarters or 77% of attendees were newcomers to the network and 15% had attended two conferences, but only 8% had attended three or more. This suggests that people making contact with the network, were possibly doing so as a transition into change management, or organisational development consultancy, or as a result of changing demands within their work context.

Asked to give their reasons for attending, half of the respondents stated their main reason was to learn from others' experiences in change management; 20% wanted to update their knowledge of organization development and change, and 10% of respondents' indicated that networking was their main reason for attending the conferences. The remaining 20% indicated reasons other than those already mentioned. One participant stated they were 'curious', another respondent indicated their reason was to enable them to 'think outside of the box', and four (10%) participants stated their main reason for attending was to 'present a paper'.   Whatever their reasons, the value of attending these conferences was highly rated, 97.5% believed that attending one or more of the OD Network conferences had increased their knowledge of OD.

People who had attended more than one conference stated they had implemented at least one new idea in their own organisations, or been introduced to new ways of thinking. Though not all attendees had yet had opportunity to implement their learning, they all stated they had received value for money in participating, whether they were active presenters or not.

The format of the conferences has typically been the presentation of eight to nine papers through the course of a single day. At present all sessions are plenary. As

competition for 'airtime' increases at the conferences, so the viability of the current format may be challenged. There is a certain prestige about offering a paper at a national conference and though regional differences are noted, the network intentionally holds to its 'national' identity. The implications of size and structure are discussed later in the paper.

Analysis of the topics and quality of the papers presented over the past four years, and the evaluation data suggest that the objective of sharing innovations and best practices in OD has been met in part. Over the course of the four years, we have seen a change in the standard and type of papers on offer. An informal analysis of abstracts revealed that papers given in the early conferences were largely practitioner focussed and descriptive. (No formal papers were required in Conferences 1 and 2). Some theoretical papers have been delivered throughout, but from Conference 5 onwards there is a marked trend toward greater use of more rigorous case studies and research-based reports, more reflection on practice and the raising of deeper theoretical considerations. Of fifty-two abstracts reviewed, 20 presentations were based on experience in the public sector, 14 in the private or commercial sector, 3 in the third (NGO) sector. Fifteen were non-empirical theoretical or generic reflections. Opportunities for organisational development contracting or consultancy work is most likely to be found in public sector organisations in New Zealand, so these findings are not surprising. The demographics of the 9th conference (where nearly half of the participants were from the public sector) reflect both the political context of Wellington and the OD opportunities typically found in large bureaucratic organisations.

Qualitative data reinforce the different outcomes and value participants had gained from the network. Some of these are discussed more fully below. The main benefit noted in the qualitative data was networking which is at some variance to the stated benefit of increased knowledge about

change management and OD practice. The making of contacts, the application of others' ideas, and the enhanced sense of identity brought through having a reference group with which to affiliate could all be deemed to be a result of active learning within the network and through its processes.

It is to some wider questions about how to sustain such learning and engagement that our paper now turns. We do this through the introduction of a series of concepts which are, we believe, in creative tension with one another, meriting further research and reflection.

Requisite connection

Conferences are non-thematic. This gives maximum opportunity for diversity of interests, but may also lead to fragmentation and a lack of focus or shared discourse. The openness of the conference may also attract a disproportionate number of first-time, or early-career presenters, seeking to establish a professional identity ("to put themselves on the map"). A number of post-graduate students from both Waikato and Auckland Universities have valued the opportunity to make their first conference presentation within the context of this network as a first step in their academic or professional careers. If this is the case, the regular conference setting serves an important role in bringing people together purposively. We note that 76.3% of those present at this particular conference had not yet presented a paper at any OD conference.

Connection is fostered through direct interaction. For this to flourish, there needs to be ample opportunity for conversation and debate, within each conference, as well as formal presentations, feedback as well as listening, for unstructured opportunities to meet people as well as intentionally designed arrangements. In these respects it is useful to conceptualise networks as emergent communities of practice with both self-organising and leader-organised properties (Biggiero 2001). Given the intentions for NZOD,

an important task for the leadership of the network is to provide opportunity for people to meet together in different constellations. Here interests may compete. Given the time limitation of one day, should student demands to present papers grow, there may be a need to provide a student stream, so that other practitioners may also have opportunity to present. Such a change would, to some extent, undermine the value of the plenary forum through which the conference gathers its sense of coherence and connection.   As the number of people wanting to present grows, so the format of a one-day, affordable, face-to-face conference may be compromised.   Ways have to be found of holding in creative tension the need for adequate connection and the stimulus of variety.

Requisite variety

Though much networking is serendipitous, the process of creating a network is not chaotic or random. At the personal level, networking is an intentional, purposeful activity, through which an individual seeks to establish sociometric links with others in order to establish a professional reference group, link into privileged information (such as unadvertised job opportunities) or expand opportunities for affiliation and professional and personal development.   At the organisational level, intention is expressed through the call to participate, and the reconciling of different interests in gathering.

A criterion for association is an important defining factor in any interactive situation (Byrne and McMorland 2000). Half of the respondents in the evaluative survey gave "learning from others' experience" as the main reason for their attendance. However, one of the paradoxes of formal affinity networks is that individuals seeking heterogeneity of networking opportunities homogeneously congregate around the same attractor. The half seeking "to learn from others" (presumably less experienced practitioners) need experienced practitioners also to attend so that this can

happen. Experienced practitioners will undoubtedly seek different forms of tangible and intangible benefits from their participation. The needs of those seeking to update their knowledge (20%) are less likely to be met if the pattern of recruiting participants swings too far toward the novice end. The maintenance of requisite variety (diversity of recruitment, broadening of goals) is needed to overcome unmitigated connection, namely the accelerating force of attraction of like kind (Senge, 1990, Buckley, 1967). We have seen the impact of such forces in other networking organisations. One such example is The Organisation Learning Foundation (OLF), which started as a heterogeneous network of people interested in organisational learning, but as more and more consultants joined, so the network became less and less attractive to non-consultant OL practitioners, leading ultimately to a loss of membership and the ultimate demise of this network. Maintaining requisite variety within a fluid system of inter-relationships is therefore a continuing challenge for network organisers.

The findings of the recent evaluation show that this is an issue that the OD network (see Table 1) will have to address in the future. In the 2003 sample of participants, nearly half of the sample (47.5%) was working in the public sector. This gave rise to suggestions for improvement for:

> "*more private sector presentations (this one mostly public sector and NFP)*"

> "*more cultural diversity (Maori models of change)*" and the need to

> "*lift the profile of this opportunity – broaden it*".

The 'improvements' suggested by one group of attendees may, however, not be representative of all. We see another tension in the degree to which individuals are committed to the wider purposes of such a network.

Attraction and affiliation

Networks are transient by nature – they attract participation but this may not lead to on-going engagement or deeper, sustained affiliation, either over time, or in intensity. This is both their strength and limitation. A Call for Papers is like a summonsing call of welcome (karanga) to the marae (Maori meeting house), or an invitation to dance. Within the context of one occasion there is no obligation for membership, or permanence. The dance is progressive – the music plays and within the set steps there comes a time to move on naturally to the next partner. Conference attendance too invites perchance meetings. It is only when the network is reinforced by more frequent contacts that affiliation deepens and a sense of identity and responsibility grows. Inevitably then, as the figures of our evaluation show, there is likely to be a large number of people who are novel to any one event and to each other, and smaller numbers more centrally connected to each other and to the purpose of meeting. This means that, at one level, meaning has to be generated afresh – there is opportunity for novelty and spontaneity, for new character to emerge. But as we have seen above, there is a need for requisite connection, for a holding together of relationships by at least a few people, so that others may be free to dance through. An interesting question arises as to how people choose and establish sociometric positions (core or periphery) within a network, and what prompts people to make shifts in their level of affiliation and connectedness over time. We have not explored why some return and others do not, but we note an inevitable tension between these two levels of belonging: the tension between loose affiliation and more formal association. Without some structure (formal roles and relationships, the take up of leadership) there is nothing to which others can be loosely joined. This tension brings out questions of organisational arrangement.

Organisational issues

Currently, the organisational arrangement centres around the relationship between Tom Kalliath (who initiated the OD Network) and Navigate, a private sector OD Consultancy firm which provides administrative support, systems and advertising. Together they have sustained the conference series over time. Recent experience with other networks suggests that organisational arrangements and leadership succession are important dimensions to highlight. We suggest that neither dimension can be taken for granted and that issues of leadership, accountability and sustainability need to be addressed which, in turn, have implications for organisational form.

Two examples illustrate the challenge. When the initiating leaders of OLF (a consultancy partnership which invested heavily in setting up the network from the outset) wanted to hand over the reins to others, less centrally-affiliated individuals were unprepared to invest the required levels of time and finance to sustain the association. Consequently the network lapsed for lack of voluntary and self-organising capability. In the case of NZARN, the leadership of this network was provided by one individual and sustained, through her abundant goodwill, for ten years. On her retirement from this responsibility, volunteers were called for to sustain the work. The sharing of leadership amongst several people in the Network has raised questions of how individuals remain accountable to one another, how effort is sustained, and whether the loose network of affiliations that sufficed over the former years now needs to be held together through more formal organisational arrangements (beyond the regular subscription fee). A recent survey of the 60+ members of NZARN resulted in a return of only 4 responses, leading one to question whether or not the 'network' could be deemed still to exist!

Biggiero (2001) distinguishes between strongly-led and self-organising networks. The OD Network, with its formal pattern of half-yearly conferences, initiated by consistent leadership, lies towards the more structured end of Biggiero's continuum. NZARN's approach, with responsibility for Annual Seminars passing from one volunteering organising centre to another lies towards the less structured end. ALARPM with its pattern of delegated but sponsored conferences provides yet another pattern of ways in which responsibility and accountability are held.

ALARPM has sought to address some of these issues as it has changed identity over the years - from a local, to a national, to an international network, and now into a network of networks. The question of how affiliation is required will need to be raised throughout each level of the network. NZOD might well choose to affiliate to the wider network of ALARPM – we have similarities of method and values, as well as distinguishing differences. But closer links might also be made through personal linkages within New Zealand to networks such as NZ Action Research Network (NZARN) or HERDSA.

For all these network forms, the problem of sustainability remains: that is, how is a level of stability maintained in a fluid network of relationships when positions of leadership change, or when the network itself shifts from the start up phase to one of succession? The very benefits of networking – fluidity and openness of access, transience, high personal or organisational gain with low personal or organisational investment – are the very dynamics that militate against continuity and transfer of responsibility. OLF was unable to resolve this tension and folded. NZARN is challenged with adopting a new organisational form, knowing however that formalisation may contest the very spirit of the network's intention. From these reflections we are led to ask a series of questions:

- Is networking simply one stage in the evolution of communities of practice or professional associations?

- Are networks, by their very nature, dependent on the committed altruism (and self-organising) leadership of particular individuals?

At this stage we do not have full answers. We can however identify some of the challenges of learning together that networks pose.

Learning together through networking

Whilst respondents in the 2003 survey identified networking as the most important benefit of the OD Network conferences, the value of learning together through this network was also strongly endorsed. 'Learning from others, gaining new knowledge and new ideas, understanding different perspectives on change, seeing that individual experiences were not unique but shared by others, confirmation of practice and exposure to different practices for shared situations' were all mentioned as benefits accruing from participation.

Personal mastery and collective learning are challenges long recognised in the burgeoning literature of organisational learning. Peter Senge (1990), for example states that learning how to learn collectively and effectively is the next important step in human evolution. Networking organisations have an important part to play in this context as they provide access to learning situations that may not be available in the workplace. This may be particularly important for change management and organisational development practitioners who sit in marginal positions in relation to their organisations (Cummings and Worley 2001). The value of having a safe place in which to reflect on practice, to raise issues and dilemmas for collegial discussion and support, cannot be under-estimated. Poell, Chivers, Van der Krogt & Wildermeersch (2000) point to changing patterns of learning now required in a range of occupational contexts including much that might earlier have been seen as personal development. '…self-efficacy, self-reflection, communication

and group skills, are now being embraced by organizations as seemingly relevant contributions to modern working life' (Poell et al. 2000). They highlight the importance of a range of media for learning including action learning and 'the importance of socialization into a community of practitioners', and the tension between functionalist approaches to learning (to better fit the learner into the organisation) and the more radical stance of critical appraisal. Learning that strengthens professional identity, autonomy and intellectual depth may not be available within some work organisations (where there are entrenched situations) or where there may be insufficient resources to be support practitioners championing change. A major benefit offered by the OD Network is the regular opportunity to meet colleagues and peers outside specific work situations for professional reflection and practical review. Poell et al. identify external professional networks as one of four learning strategies for organisational learning. Though we did not specifically inquire into the extent of participants' employing organisations for such learning, we take the fact that many had been granted time off work, had conference fees and expenses paid for as indicators of employers' support for learning beyond the work place. The challenge, we believe for the OD Network now, is to address the creative tensions we have identified in order to ensure that the quality of collective learning achieved through the conference framework can be maintained. This will inevitably require changes in structure and approach as we collectively learn more about how to create opportunities for engagement, instruction and inspiration.

Our study has been a work-in-progress report. We look forward to further debate with others on different ways in which we can learn together through networking and are grateful for the opportunity to bring this reflection to the ALARPM World Congress in Pretoria.

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Reticence in Action: Reflections on People-Centred Research
Matthew Parnell -

Introduction

This paper reviews an action-research approach adopted by the author/researcher in framing a PhD research program provisionally titled *Imperfect Whitefella Dreaming: Ways to a Culture of Sustainability*. This research program is investigating the interrelationship of culture, learning and technology in the sustainable development of small communities. It is seeking out ways that could guide new approaches to sustainable development arising from existing thinking and ideas about development. The title respectfully draws inspiration from the indigenous Australian world-view where action in the world is guided by an holistic cosmology; a key contention of the research is that deep behavioural and cultural change, and not just better technology, is needed to make communities of all kinds sustainable. In a global sense, we need a new "dreaming" to re-shape our culture of environmental exploitation and to guide our everyday actions in the world, no matter how imperfect this dreaming may be.

The research places cultural and behavioural factors, community participation in technological choice and the personal/subjective at the heart of the ecologically sustainable development process. Consequently, the research demonstrates an action-oriented people-centred approach in the collection of data, consistent with the described community development frameworks. Further, it is based on respect for local viewpoints and a meaningful exchange of service.

This research is also seen as a vehicle for community development first and foremost, with research outcomes a secondary output. As a result, the author's attitude to data collection is one of reticence, and as a result, it creates obstacles to timely completion of the research. The paper outlines the researcher's strategies for dealing with such obstacles.

Research Framework

The research program has been divided into the following areas (Parnell, 2000):

Experience and Reflection

This is a summary and review of four years of the researcher's participation in community development and technology transfer projects in remote indigenous communities. The purpose of such reflection is to highlight the main sustainability research questions arising from this experience and to identify the themes requiring further investigation.

Key Contentions

Reflections on the researcher's experience have generated some key contentions which shape the direction of this research, and will be reviewed through community-based case studies. These contentions concern the importance of the small community, the place of the personal and subjective, participation of people in technology choice, how we "live on country", how we listen to the land and how these factors combine in a synergistic way.

Key Sustainability Issues

This section reviews current thinking about sustainable development, including philosophies, models and processes. It further investigates the components of the key contentions in terms of the sustainability agenda, with particular

emphasis on the thematic areas identified in *Hidden Synergies* (above) and articulated in a previous paper (Parnell, 2001).

Communities

This section is a collection of community-based case studies investigating and testing the key sustainability issues and the key contentions. This is where the methodology chosen is critically important, not just with regard to the quantity and quality of the information gained. The emphasis is on the researcher's participation in actions with communities that return some kind of benefit to the communities. This is further elaborated later in this paper.

Stories

Because of the contention regarding the importance of the personal and subjective, storytelling is an appropriate vehicle for illustrating and analysing the key sustainability issues. These stories may arise from the author's community based activities or other encounters. They may also be sourced from information already in the public domain.

Synergies

This section concludes the program by identifying any ways or "dreamings" that arise from the synergies of the key sustainability issues investigated.

The Community Development Context and the Intent of the Researcher

"Don't do anything about us without us" (Anderson, 2001).

The researcher has been inspired and guided by direct personal experience in community development, and the body of knowledge, both theoretical and practical, from development contexts in first, third and fourth world communities. The research programme contends that community development at the personal/local level is a

critical factor for ecological sustainability. It would be inconsistent with this contention for the research program to be modelled on extractive and exploitative methodologies: to look upon communities as merely sources of data is unacceptable for this research program. The researcher has therefore framed the research program to be consistent with leading-edge praxis in community development.

There are many frameworks and methodologies guiding community development processes; such frameworks have been evolving over the post-World War II and post-colonial periods. Early development processes had been focused on national development rather than community development. While large amounts of aid money still goes to funding national-development style projects such as dams, bridges, ports and power stations, there has been an increasing emphasis on grassroots development processes which include local people in the design and implementation of local development projects and programs. The language of development has changed to reflect this evolution.

From things to people

Mode:	blueprint to process
Keyword:	planning to participation
Goals:	pre-set to evolving/closed to open
Decision making:	centralised to decentralised
Analytical assumption:	reductionist to holistic systems
Technology:	fixed package to varied basket
Methods/Rules:	standardised/universal to diverse/local
Professionals:	instructing/motivating to enabling/empowering
Seen as:	beneficiaries to partners/actors
Force flow:	supply-push to demand-pull
Outputs:	uniform/infrastructure to diverse/capabilities
Planning and action:	top-down to bottom-up (Chambers, 2000).

The full evolution of this language, and its ability to modify the approach of development projects of the World Bank is evidenced in the World Development Report 2000/2001, where a social capital approach was applied for the first time along with recording "voices of the poor" from 47 countries. (Narayan et al 1999).

The researcher has been influenced by people-centred ideas arising from community development frameworks developed by (among others) Tony Kelly, Robert Chambers and HealtHabitat. These frameworks recognise that research that extracts and uses data inappropriately is exploitative. This includes situations where there is no immediate or obvious benefit returned to research subjects arising from the research intrusion. It is often said that researchers use other peoples' intellectual property to further their academic careers, while the owners of the research "data" either gain no benefit, are ignored or disadvantaged.

Framework 1: Head, Heart and Hand

Tony Kelly is a community development worker, lecturer and academic based at the University of Queensland. He is also closely associated with Community Aid Abroad/Oxfam, having co-ordinated their Community Leadership Program for many years. His ideas and inspirations about community building have been developed through many years of grassroots work with community groups in Australia and overseas. The core of the Kelly framework is the concept of head, heart and hand where action, knowledge and good intentions combine.

This framework promotes the primacy of relationships and of acted behaviours in successful community work:

> *Because relationship is the pivot on which all else turns in community building, it is important for us to be aware of the many and different relationships that are possible and of the many ways to engage in them. Who-we-are makes a great deal of difference to what we do, but who-we-are-in-relationship is*

the process through which the work gets done. (Kelly and Sewell, 1998, p.3)

Kelly and his colleague, Sandra Sewell, also refer to the problematic nature of writing about community development:

> *Community building is, in any case, primarily an oral and action tradition. Much of its wisdom grows out of the discussions of people talking with and working alongside other people. How to share that collective wisdom beyond immediate networks is often a dilemma. To write, publish and distribute a book seems a good idea. However, while a book can engage people's minds, even their hearts, the translation of those ideas and feelings into action can be tenuous.* (Kelly and Sewell, 1998, p.3)

These thoughts could equally apply to the problem of data collection for a community-based research program such as described in this paper; they express the need to work with people, not research on people; they also express a certain reticence about the process of writing; further, they stress that this research program, then, is not merely adding to a body of knowledge, but is, more importantly, a form of community-building.

Framework 2: RRA/PRA/PLA/PME

Another key community development framework informing this work is the PRA/PLA/PME approach developed by Professor Robert Chambers of the Institute of Development Studies, University of Sussex, UK. This framework combines a family of methodologies in continuous evolution, and as such go by various acronyms, which lend themselves to different names.

RRA (Rapid Rural Appraisal) developed as a means of quickly gaining local information in third world rural development projects in the 1960's and 1970's. Many of the techniques pioneered in RRA are still in use, although RRA is now not viewed as holistic and participatory. PRA

(Participatory Rural Appraisal) was an evolution of RRA, with an emphasis on participation and de-emphasis of the rapid. It is now more commonly referred to as Participation-Reflection-Action to incorporate the need for participants to reflect on the process as it unfolds. More recent methodologies are referred to as PLA (Participation-Learning-Action). PME (Participatory Monitoring and Evaluation) is a sub-framework where community participants determine what is to be monitored and evaluated, and how.

The main ideas of the framework are embodied in the following questions:

> Whose reality counts?

> Whose knowledge?

> Whose criteria?

> Whose analysis?

> Whose priorities?

> Whose planning?

> Whose action?

> Whose monitoring and evaluation?

> Who participates in whose project? (Chambers, 2000).

This framework recommends that these questions must be uppermost in the researcher's mind when engaging in community-based research, with an implied assumption that the researcher is not detached or neutral. Researchers become participants and this influences the way information is gathered and analysed. A spirit of *optimal ignorance* and *appropriate imprecision* is engendered where no more information than necessary is sought and comparing is done rather than measuring. Finally, participatory action research must be an open process in terms of its ethical and political implications (Chambers and Gujit, 1999).

Framework 3: Housing For Health/Fixing Houses for Better Health

Housing for Health and its evolutionary derivative Fixing Houses for Better Health (FHBH) is primarily an action research technique developed by Paul Pholeros, Stefan Rainow and Dr Paul Torzillo of HealtHabitat for use in improving the health outcomes for people in remote indigenous communities by improving health hardware in housing. These methodologies have been influenced by the late Fred Hollows' philosophy of *no survey without service*. This philosophy requires that research project actions must return an immediate benefit to the subject community as part of the process of data collection.

The various projects carried out since the mid-1980's using these methodologies have focused on ways of making immediate improvements to health hardware in houses, which in turn support identified healthy living practices. This includes unblocking drains, fixing toilet locks, changing shower heads, testing power outlets and fitting toilet seats. Researchers employ local people in data collection and fixing processes. Plumbers and electricians follow the research teams to fix more complex problems. (Pholeros, et. al., 1993)

The ideas behind these frameworks are reflected in the structure, approach, tone and flavour of this research program. Other frameworks inform the research project. These include a community development practice framework articulated by Jim Ife in Western Australia (Ife, 1998 p.250); a participatory framework for building and community design (Hamdi, 1991); community practice guidelines (Wates, 2000); and community planning participation frameworks (Sarkissian et. al., 1999).

Ethics and Data Ownership in the Community Context

The research program has undergone the normal ethics approval processes. This included not revealing identities unless specifically indicated, and using photographs of indigenous people and communities without consent.

There were some difficulties around the compulsion to obtain written approval from participants in any research actions. The researcher contended that it was inappropriate and unethical to seek written approval from people who may be functionally illiterate. Alternative proposals, including tape recording or video of participant's approval, were rejected by the ethics committee of the University concerned. There is no way around this requirement process. This may compel the researcher to avoid participation with people who cannot adequately read consent request forms. The implication is that a particular case study community may have to be dropped if there are too many obstacles in the completion of paperwork.

Through the application of ideas in the frameworks described above, this research program self-imposes a more stringent ethical requirement than that required by the University concerned.

The research program has been primarily framed both as a deep learning and personal development vehicle for the researcher, and as a means of community development for case study communities. The usual outcomes of a PhD, such as contribution to knowledge, increased qualifications, higher academic standing, career promotion and financial gain, though welcome if achieved, are secondary.

The normal PhD research outcomes as indicated above are not problematic for most researchers, even with the ethics requirements of university ethics departments. However, in situations where communities are merely seen as a data

resource, research praxis and its accompanying behaviour and attitudes may:

■ hinder development of relationships with community people;

■ fail to build trust;

■ raise suspicion about the motives of the researcher; and

■ adversely affect the availability and flow of data.

Data Collection Methodologies

The research places cultural and behavioural factors, community participation in technological choice and the personal/subjective at the heart of the ecologically sustainable development process. Consequently, the research demonstrates an action-oriented people-centred approach in the collection of data, consistent with the described community development frameworks. Further, it is based on respect for local viewpoints and a meaningful exchange of service.

Key Drivers

The collection of data in the research program has four main drivers:

■ Reflections on the researchers experience of working as a built environment technologist in different cultural milieux, particularly remote Indigenous communities;

■ Case study data will only be collected via service-oriented community-based participatory actions by the researcher;

■ The reality (and interests) of people in case study communities is paramount, not the researcher's needs;

■ Researcher participation is by invitation, which can be revoked at any time, with no explanation needed.

Identifying Case Studies

The communities section of the research program has been constructed flexibly so as to be able to respond to case study opportunities when they arise. Several case study opportunities have arisen. These range from local communities, mainstream communities, remote indigenous communities, and third world communities. The intention is to investigate the issues in quite contrasting types of communities.

With small communities as the focus of the research, and the self-imposed requirement of action and participation, there is a strong compulsion to participate in a project as close to home as possible.

Most case study opportunities have arisen from existing professional, academic and personal networks. Some are based on communities where the researcher has previously worked. Some have been consciously sought. All have begun with some form of relationship building, which is a necessary pre-curser to receiving an invitation to participate. In the program to date, some possibilities have not developed, and other new ones have arrived.

Some case study potentialities have not been realised, being subject to on-going relationship building activities. Three case studies are in progress, and one further case study stalled and became inconclusive. One of the case studies in progress has become subject to cultural business which has caused activities to be postponed indefinitely. Another case study had been waiting for funding to develop through the new Desert Knowledge Co-Operative Research Centre. This has been subject to a long gestation and was successful only recently .

With regards to storytelling as a means of data collection, the research is structured so that opportunities for one-on-one discussions may arise from participation.

Exchange of Service

With the meaningful exchange of service identified as a personal condition of participation, the researcher has the following options for action:

- Supplementing a project or process already underway;
- Working with a community group to identify an appropriate project or process;
- Approaching communities where there is an existing relationship to propose a range of actions.

The researcher's knowledge and skill base in housing and infrastructure and professional experience have the potential to contribute a range of services to case study communities. The types of actions that identified are:

- Community building design and construction;
- Community planning;
- House surveying;
- Participatory monitoring and evaluation of planning, housing and infrastructure projects.

Some of these actions have already been carried out in some case study communities.

Obstacles

The ethical approach to this research program raises the degree of difficulty in terms of having enough suitable case study communities, and being able to learn enough about the communities in order to test the key contentions and key sustainability issues.

It is expected that results will be rich in human terms, but patchy in terms of all the key issues identified. At all times there is a risk that any participatory research actions may not produce any usable outcomes. There is always the risk that communities may end any arrangement at any time for whatever reason. Achieving maximum coverage of the key

issues and allowing for the collapse of research opportunity is one reason why so many potential case study communities have been identified, and more will be needed.

When it comes to interviewing community participants for personal stories, the researcher's reticence about the ethical issues surrounding written approval may circumvent documentation and publication, but hopefully not prevent the telling of a good story for mutual enjoyment and learning. There is however, much information in the public domain, particularly regarding indigenous peoples stories: newspaper interviews, television interviews and radio interviews. If the ethical issues regarding personal stories cannot be overcome, then public domain material will be sought.

Mapping Communities and Processes: The Case Study Matrix

In order to plan for researching the key issues, a spread of communities, and particular actions in those communities, are placed in a matrix against the key issues (Table 1). In the progress of the research, there will be from time to time apparent incompleteness in the matrix, but there will be scope until quite late in the research program to include a new case study that provides more coverage of the matrix if the opportunity or invitation arises. Four commenced case studies are shown, including an inconclusive Tasmanian project. A blank case study is included to show that case studies can be added to the matrix.

Reflections on Reticence

The underlying sensibility in this research program, then, is one of reticence about intruding on peoples' lives and the subsequent risk of misrepresenting their realities. The degree of difficulty is thus raised considerably, but the value of the outcomes to the "researched" will hopefully justify the approach. It will certainly be more personally satisfying for

the researcher knowing that there has been an exchange in the process rather than merely an extraction of information.

The Case Study Matrix

Process	Building Design & Construction	FHBH Process	Community Planning Process	Community Planning PME	Housing & Infrastructure PME	NGO Activities
Key Issues						
ESD Models			*	*		*
Dev Processes	*	*	*	*	*	*
Culture	*		*	*	*	
Social Capital	*		*	*	*	
Technology	*	*	*	*	*	*
Placemaking	*	*	*	*	*	*
Learning	*	*	*	*	*	*
Listening to the Land	*		*			
Case Studies						
Case Study 1: Tasmania	*		*	*		
Case Study 2: Tasmania			*			
Case Study 3: Central Aust.		*			*	*
Case Study 4: East Kimberley			*	*	*	*
Case Study 5: Northern NSW			*	*		*
Case Study 6: TBC						

To only use information that arises out of active community participation means that information:

- flows as it will, at the development of opportunity, and the goodwill of the community;

- may not be extensive in its coverage of the issues;

- is contingent on invitations to participate.

This reticence then is resulting in a primarily phenomenological approach where the subject of the research is the researcher and his reflections on his own participation in community development processes, augmented by other people's stories and experiences when freely offered.

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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.

Role of Action Research in Workplace PhD Research
Tay Boon Hou & Stewart Hase -

Introduction

How do you make a mature student into a competent research candidate in their own workplace? And how do you turn that competent research candidate into a PhD graduate who eventually adds new knowledge to research communities via a completed dissertation? This paper offers a useful model for conducting doctoral workplace research that is problem-focused, context-specific and future-oriented. Apart from improving practice, it can also strengthen a candidate's timeless qualities such as confidence, capacity to think systemically and ability to realise their natural potential to learn. Further, the concepts used in this paper can also be applied to any learning experience.

Importance of Learning with Consideration of Context

According to Northrop (1944) and Devlin (2000), in order to derive a mathematical theory, the mathematicians must first define the objects with which they are going to work. These objects can be numbers, points or lines. They then lay down certain laws called axioms to govern the behaviour of the objects they have defined. After this point, there is no longer any need to know about the phenomenon that led to those axioms in the first place. On this foundation, they build through a series of logical arguments, a whole structure of mathematical propositions, with each proposition resting on the conclusion established in the proposition preceding it.

They are not interested in the truth of the axioms and ask only that these axioms be consistent.

However, there is a drawback for relying on the safety of obscure mathematics without any clear visual picture or any relationship to context that led to those mathematical axioms. As highlighted by Kaku and Thompson (1995), it was Einstein's great pictorial insight that led him to propose *relativity theory* that was unerringly correct during the first three decades of his life. The irony is, however, that in the last three decades of his life, Einstein failed to create *unified field theory* largely because he abandoned his conceptual approach, and relied solely on his derived obscure mathematics, without any clear visual picture.

If truth can be deduced from an axiom, it is called complete. However, as mentioned in the works of Paulos (1991), Dossey (1992), Dehaene (1997), Lavine (1998), Nolt, Rohatyn and Varzi (1998), Barrow (1999), Dewdney (1999), Kaplan (2000) and Barrow (2001), Gödel's Theorem says that if we write down any consistent axiom system for some reasonably large part of mathematics, then that axiom system must be incomplete. There will always be some questions or true propositions that cannot be answered or proved on the basis of these axioms.

Therefore, we have to accept the fact that we will be unable to solve all problems using our axioms or assumptions. There will always be true propositions that we cannot prove from these axioms. And, as reflected in Einstein's painful experience, it is important to consider the context we are in.

A mere consideration of context, however, is not enough. As pointed out by Capra (1997), Flood (1999), Maani and Cavana (2002), McLucas (2003) and Pidd (2003), in the fields of mathematics, engineering, business and management, the world is perceived as a whole, comprising many, many interrelationships expressed as endless occurrences of spontaneous self-organisation. The extent and dynamic nature of these interrelationships and spontaneous self-

organisation means that it is only possible for us to come to grips with those things that are local to us in space and time. Therefore, the main objective of this paper is to elaborate further on the three-style learning model mentioned by Sankaran and Tay (2003). The application of this model is illustrated by describing how a research candidate can conduct a research study with consideration of the "local context" they are in and with recognition of the dynamic nature of interrelationships and spontaneous self-organisation within that "local context". The research methodology used in the workplace here is action research which is a very effective methodology for facilitating and researching change in organizations.

The Workplace PhD Model

As shown in Figure 1, the proposed PhD model comprises of three stages, namely, Pedagogy, Andragogy and Heutagogy. Each stage is explained in subsequent sections.
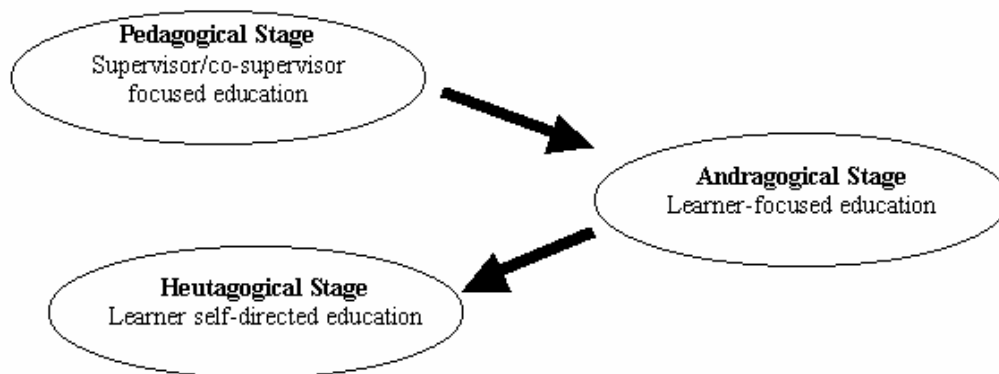
Figure 1:   The Workplace PhD Model

Pedagogical Stage

This stage focuses on the orientation provided for new candidates to the action research program. An effective orientation contributes a great deal in sustaining the

candidate's commitment and satisfaction in the research program. Poor orientation can cost the research institution dearly. Those who do not start right tend not to stay on and complete the study. High failure rate also affects the morale of those that stay behind. Some may even wonder if they should be looking for another research institution.

New candidates in a research program are always under great pressure to perform and adapt. They start with many basic questions such as "How do things really work in a PhD study", "What are the tools that I use", "How do I log my data", "How do I validate and verify my findings". At the same time, they must ensure that their adopted inquiry process and techniques for data collection and validation are acceptable by the research community. As most of this information is embodied in someone else's experience and knowledge, pedagogy is adopted as the initial induction to enable new candidates learn and adapt quickly to those methodologies and techniques accepted by the research community.

As pointed out by Marcia (2002), pedagogy embodies supervisor-focused education. In this stage, supervisors assume responsibility for making decisions about what will be learned, how it will be learned, and when it will be learned. Supervisors direct learning.

An important step at this stage is to help new candidates feel a sense of belonging and acceptance within the research community. This is achieved by having new candidates work in groups called "learning sets". A learning set comprises local co-supervisors and a group of research candidates who are at different stages in their research study. Some may have just identified the research theme, some have completed their research work and some are in the final stage of a writing first draft. The learning set meets on a monthly basis.

New candidates learn the norms and values over time through formal presentations, informal dialogues, and from

hearing about personal experiences of other learning set members. The formal presentations help build a candidate's confidence in dealing with critiques and disconfirming evidence.

The orientation process is accelerated when new comers participate in the Action Research and Evaluation On-Line Program (http://www.scu.edu.au/schools/gcm/ar/areol). This online program exposes the candidates to a set of research methodologies and techniques, such as action research (Dick, 2000; 2000a), soft systems methodology (Dick, 2000b) and grounded theory (Dick, 2000c; 2002; 2002a; 2002b). New comers are asked to apply the knowledge and techniques from this on-line program to snapshots of their own research context from daily logs, minutes of meetings, seminar materials and journals.

This stage is concluded when new candidates attend a residential seminar at Southern Cross University with their Australian supervisor and their local supervisor from Singapore. During the seminar, students learn to use a range data collection tools, such as focus groups, search conferences, stakeholder analysis, interviewing, and grounded theory, and they consolidate their research proposal with their supervisors. The seminar builds a bond between the students, their supervisors and the University, as well as allowing them to focus on their research proposal in an academic environment away from their busy workplaces. At this stage, new-comers can call themselves qualified research candidates, as they have now clarified fully the research area they will pursue and they know how to use the research methodology and techniques. Figure 2 summarises a candidate's knowledge with respect to the research context.
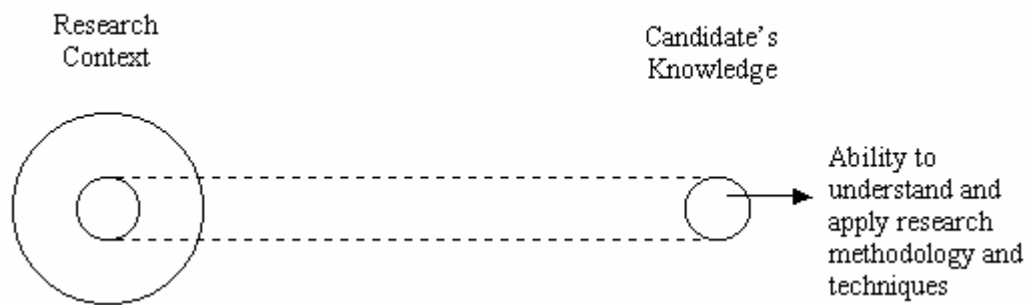
Figure 2: Knowledge gained at the end of Pedagogical Stage of Workplace PhD model.
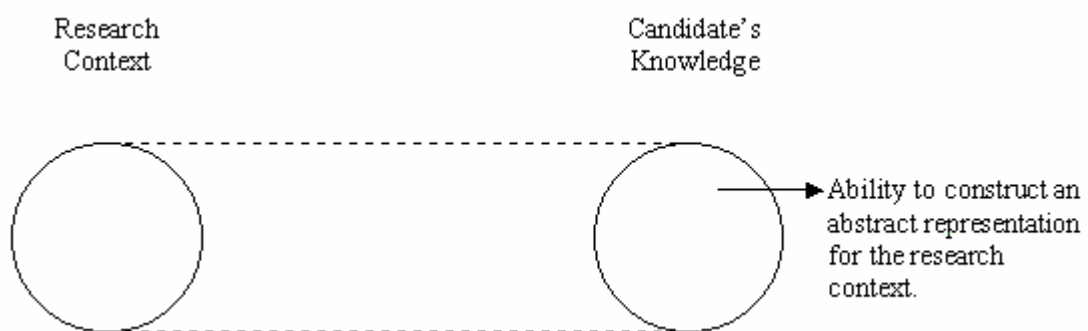
Andragogical Stage

The ability to construct an abstract representation for the research context is the primary emphasis of this stage. This stage provides research candidates the opportunity to acquire more insight into their problem situation through the process of articulating, structuring and critically evaluating a model of the research context. As pointed out by Ford and Bradshaw (1993), modelling is purposive. That is, to be involved in modelling, it is necessary to apply the model for particular reasons that together determine what should be modelled, how it is modelled and what can be ignored. This is in accord with the notion of andragogy.

As pointed out by Marcia (2002), andragogy asserts that five issues be considered and addressed in formal learning. They are: (1) letting learners know why something is important to learn, (2) showing learners how to direct themselves through information, (3) relating the topic to the learners' experiences, (4) realising people will not learn until they are ready and motivated to learn, and (5) helping them overcome inhibitions, behaviours, and beliefs about learning.

Similar to the pedagogical stage, research candidates continue to meet in learning sets with local supervisors every month and are supported by library resources and discussion lists set up through the University. In this stage,

the research candidates apply the methodologies, terminologies and techniques they have learnt in the pedagogical stage to their research situation. The local supervisors adopt the andragogical model described by Marcia (2002). The supervisors help each student identify areas that will help them address their problem situation. They also show students how to find their way through information and help them relate their research topic to their own experiences. With this support, candidates are able to examine trends and pattern of data in order to provide a richer picture of their problem situation. The outcome of the second stage is an abstract model capable of explaining the problem situation concisely and comprehensively. Figure 3 shows a candidate's knowledge acquired at the end of this stage.
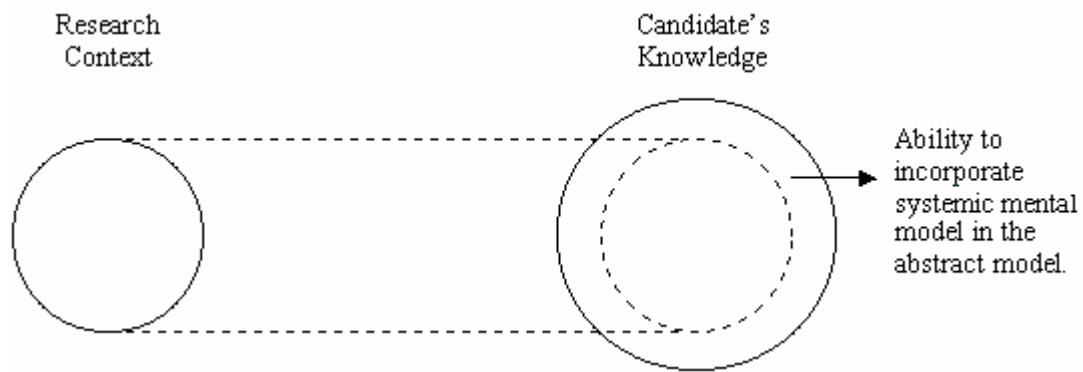

Figure 3: Knowledge gained at the end of Andragogical Stage of Workplace PhD model.

Heutagogical Stage

Using the intellectual framework of ideas and abstract models derived in the andragogical stage, the research candidates proceed to the final stage of the Workplace PhD model. There are two tasks in this stage. The first task is to apply a deeper level of thinking to the abstract model in order to determine the set of factors which systemically

create the fluctuating patterns. As pointed out by Maani and Cavana (2002), the factors may be economic, social, political or structural, but the critical outcome for this task is to understand how the factors interact. Yet the research study does not end here. As pointed out by Pidd (2003) and Maani and Cavana (2002), complex systems have real and imaginary parts. The problem then becomes how to differentiate between the two parts which is often difficult because one person's reality may be another's imagination. Since task one only looks at reality systemically, the role of task two is to make explicit the imaginary part, so that it can be understood and used by others. Making explicit the imaginary creates the potential for new knowledge/new research outcomes for the research community. It represents the candidate's mental models which influence why things should or should not work. According to Maani and Cavana (2002), mental models are based on beliefs, values, and assumptions that we (privately) hold, and they underlie our reasons for doing things the way we do. In fact, it is task two that gives the name "heutagogy" to this stage.

Heutagogy is defined by Hase and Kenyon (2000) as the study of self-determined learning. Self-determined learning concerns how to harness the learning that occurs as a part of a person's total experience. Heutagogy is interested in approaches to learning that are not teacher-centred but person-centred. During this task, candidates try to incorporate their mental models into the model identified in task one. In task two, the research candidate proceeds by asking questions such as "What are the set of changes that can improve the problem situation" and "How can the new model be applied effectively in and out of the research context". Figure 4 shows the knowledge acquired at the end of this stage.

Figure 4:   Knowledge gained at the end of Heutagogical Stage of Workplace PhD model.

As highlighted in Sankaran and Tay (2003), the heutagogy stage directs the candidate's own path of learning. Candidates are responsible for deriving the thematic concern and research question(s), developing the research design and planning the implementation of the research which will eventually lead to a final draft of the thesis. The self-determining nature of these processes is characteristic of heutagogy.

Conclusion

This paper has highlighted a useful model for conducting workplace doctoral research, with a view to developing capable researchers. Using this structured program it was expected that research candidates would complete their PhD program within three to four years. It was found that this Workplace PhD model provided the enquiry skills necessary to carry out organisational and research work concurrently which in turn lead to better management and research outcomes based on valid and reliable evidence. The authors believe that these approaches and their theoretical underpinnings may be used in a variety of learning settings.

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Application of a Dialectical Model of Soft Systems Methodology to Conduct Action Research

Shankar Sankaran, Tay Boon Hou & Cheah You Sum -

Introduction

Soft System Methodology (SSM) was developed by Peter Checkland and his colleagues at Lancaster University in the 1970s using action research with an industry partner. This methodology was derived through collaboration with industry to address 'soft' problems in social systems in which goals were often obscure as distinct from 'hard systems' which were goal-directed. (Checkland, 1999: 149). Hence the name soft systems methodology or SSM

Although SSM has been successfully applied in addressing management problems for many years, managers using SSM have expressed difficulties in applying it for various reasons. Bob Dick (2000) developed a dialectical version of Checkland's SSM as part of an action-oriented approach to help action researchers apply SSM.

This paper shows how two doctoral researchers of Southern Cross University have applied a dialectical model of Checkland's SSM to address problems arising in engineering and business applications using an action research approach.

Soft Systems Methodology

Soft Systems Methodology (SSM) was developed through the work of researchers and practitioners from Lancaster University in the 70's, who had found that the methods developed through 'hard' systems approaches – the General Systems Theory strand and the Systems Analysis strand - were inadequate to address complex real-world problems faced by managers.

Checkland's seven-step model proposed in 1975 (Checkland 1999: 163) considers the problem situation in both the 'real' world and the 'model' world.   It involves systems thinking which is applied to develop root definitions to clarify the real problem and conceptual models to look at ideal solutions.

Essentially the seven-steps are:

1.   The problem situation 'unstructured'
2.   The problem situation 'expressed'
3.   'Root definition' of relevant systems
4.   Build 'conceptual models'
5.   Compare the 'conceptual models' with the 'real' world.
6.   Think about feasible, desirable changes
7.   Take action to improve the problem situation.

Checkland himself admitted in a discussion of the development of the model in practical situations in a 30-year retrospective of soft systems thinking and practice, that the seven-step model has mainly been used for teaching purposes (Checkland 1999). In particular he discussed enhancements to the models in three other works dealing with SSM (see Wilson 1984; Checkland and Holwell 1998; Checkland and Scholes 1990). He also discussed some of the issues faced by researchers by reflecting on the link between root definitions and conceptual models to clarify the problems faced during the modelling process (Checkland and Tsouvalis 1997: 154).

Other authors have also pointed out some problems faced in applying SSM while conducting research (Ledington and Ledington 1999; Rose 1997; Flood 1999 and Mirijamdotter 1998).

A Dialectical Model of SSM

Dick (2000) has considered SSM as progressing through four dialectics:

- 1st dialectic – Between immersion (rich picture) and essence (root definition), where researchers try and experience the problem situation as fully as possible and then stand back and define its essential features;

- 2nd dialectic – Between the essence (root definitions) and the ideals (conceptual model) where researchers try to find an ideal way to achieve the same transformation of inputs into outputs;

- 3rd dialectic – Between ideals and reality where researchers think about improvement to the ideals or the actual situation;

- 4th dialectic – Between plans and implementation where the plans are implemented and differences between plans and reality can be monitored through which further improvements can be carried out.

Dick's proposed way of using soft systems thinking is more 'action' driven than 'concept' driven, and seems to have been easier to adopt by action researchers at the Graduate College of Management, Southern Cross University, when putting soft systems thinking into practice.

Case 1: Application of the dialectical model to developing an expert system

Checkland's SSM was adopted by Tay Boon Hou in Singapore to design an expert system to develop a diagnostic model (Tay 2003). Tay and his modellers (called researchers in this paper) used the dialectical mode of SSM proposed by Dick to complete their design after facing some difficulties in using the seven-step SSM model.

Initially, the researchers decided to use the seven-step SSM model to help with their diagnostic modelling. Tay and one of the modellers, Tom, first drew a rich picture of the problem sinuation. They then developed a root definition of the system to precisely describe the essence of the system being investigated. A logical analysis was carried out using the mnemonic **CATWOE** recommended by Checkland (1999: 24-25) to ensure that the root definition was adequate.

(**C** stands for customers or beneficiaries of the system, **A** refers to the actors who transform inputs into outputs, **T** refers to the transformation that derives outputs from inputs, O refers to the owner who owns the system, **W** refers to Weltanshauung or worldview and **E** refers to the constraints imposed by the environment)

A cultural analysis, including a role analysis, social system analysis and political analysis were also carried out by the researchers.

After being satisfied that they had a good root definition, Tom developed three conceptual models. Tay then carried out four reviews with Tom to discuss the progress of the modelling design based on the analysis done using SSM. While there were initial problems with the progress everything seemed to go well after the third review. But at the fourth review Tom became very upset as the report that he had prepared for the client had been rejected. Tom ultimately resigned from his job and left the company.

Tay then carried out an analysis of what went wrong and one of the issues he recognised was that the researchers could not understand the deeper intended meaning of the SSM process because they had been unable to apply the SSM properly. They found a lack of standard criteria in SSM created confusion in the adoption of an appropriate perspective to guide the modelling process. This issue has been discussed by Mirijamdotter (1998) who pointed out that Checkland's SSM does not offer a standard set of criteria against which different perspectives can be measure or fulfilled. Eventually the researchers could not proceed beyond step 4 of the seven-step modelling process.

Tay then studied the dialectical model of SSM proposed by Bob Dick (2000) and decided to adopt it for the following reasons:

1. The researchers were able to incorporate their problem situation (the vehicle being modelled), the Diagnostic Expert System (DES) model, and the tasks to be performed to model the vehicle, into a framework that fitted the four-stage inquiry process proposed by Dick.
2. Using the dialectic model permitted frequent revisits to the problem situation to fine-tune the model.
3. The four tasks in their inquiry process could be built into action research cycles.

First sub-action research cycle

In this cycle, the modeller immersed themselves in the problem situation by attending the driving course and maintenance course for a vehicle being modelled. They tried to capture the essence of the vehicle by operating the vehicle using vehicle operations such as starting, driving, stopping or parking. Then they selected one of the vehicle operations for modelling. In this sub-action research cycle, the modeller switched between the real vehicle and their description of the selected vehicle operation as many times as needed until a satisfactory description of that vehicle operation was obtained.
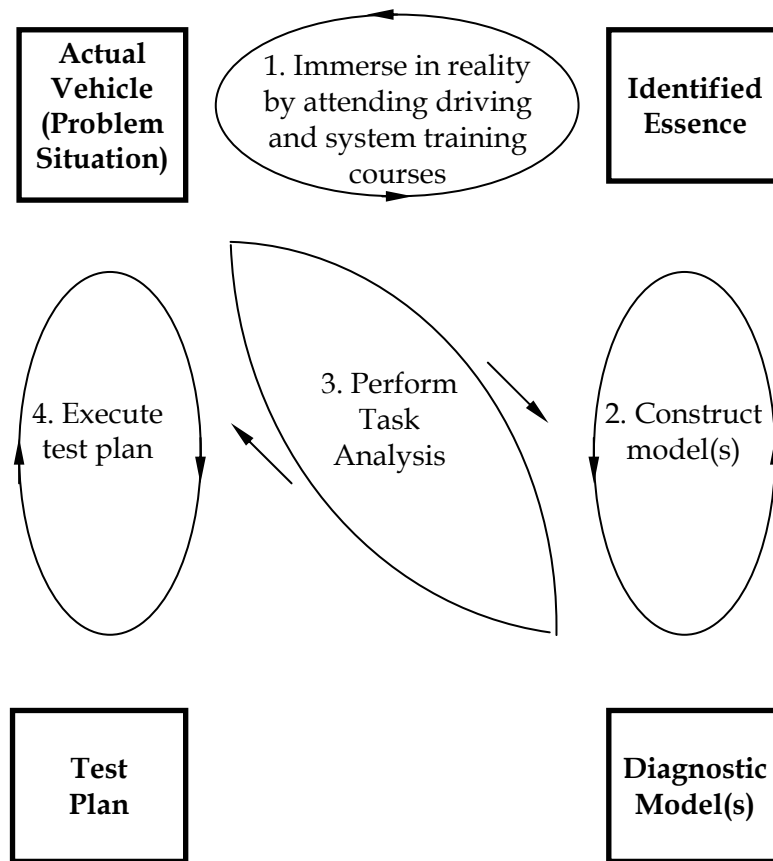
Figure 1: The 4-Stage inquiry process (Tay 2003).

Second sub-action research cycle

This sub-cycle helped in constructing the diagnostic model for the vehicle operation. This was the dialectic between the essence of the vehicle and the DES model. As suggested by Dick (1993), the modeller forgot about the real vehicle and concentrated on the derivation of the diagnostic model from the essence of the vehicle obtained in the first sub-action research cycle. This was to ensure that the modeller was able to capture the wholeness of the vehicle operation. Again, the modeller alternated between the essence and the diagnostic model until they was satisfied with the final diagnostic model.

Third sub-action research cycle

This sub-cycle was the dialectic between the DES model constructed in sub-action research cycle 2 and the real vehicle. Here, the modeller performed a task analysis. According to Gordon (1994) and Dix, Finlay, Abowd and Beale (1997), task analysis is the process of analysing the way people perform their jobs which include the things they do, how they act and the things they need to know. Thus, the objective of task analysis in this sub-action research cycle was to derive all the required inspection and repair tasks needed by the DES model. This sub-cycle was repeated where necessary until the modeller was satisfied with the derivation of all mandatory inspection and repair tasks. At the end of this sub-cycle, the modeller determined the set of fault cases based on the failure causes. The cases were then consolidated into a test plan.

Fourth sub-action research cycle

This sub-cycle is the dialectic between the test plan and the real vehicle. The test plan is verified against the real vehicle. The modeller compares the DES model to the real vehicle and notes down the differences encountered during the execution of the test plan.

Based on the differences generated in the fourth sub-action research cycle, the entire 4-Stage enquiry process was repeated until all the differences were addressed. The final product was an abstract model for the selected vehicle operation. Upon completion of the selected vehicle operation, the entire 4-stage inquiry process was then repeated to derive models for the remaining vehicle operations.

4. The process supported a top-down approach which helped the modellers to capture the wholeness of the vehicle before they proceeded to work on lower levels.

Advantages of using Dick's Version of Checkland's SSM.

Dick's version of Checkland's SSM was able to fulfil the following criteria required in diagnostic modelling.

Criterion 1: Frequent revisits to the physical situation

In a given 4-stage DES inquiry process, there were at least three visits to the actual vehicle. Therefore, in this new approach, sufficient opportunities were given to the modeller to immerse in the problem situation in search of important features that were relevant to his or her problem situation.

Criterion 2: One or more wholeness purposes

Each of the vehicle operations is in fact a wholeness purpose. The 4-stage inquiry process allowed the modeller to work with multiple wholeness purposes.

Criterion 3: A plan that encourages a shared sense of understanding and deep familiarity

The modeller's understanding at the top level was carried forward to the lower levels. These gradual accumulations of understanding from the higher levels ensured a shared sense of understanding and deep familiarity.

Criterion 4: Frequent reviews and verifications

The multiple executions of the fourth sub-action research cycle ensured frequent reviews and verifications.

Case 2: Application of SSM to shorten the time required for approval of motor vehicle insurance claims

During his doctoral research, Cheah You Sum applied the dialectical mode of SSM to an insurance company in dealing with motor vehicle claims and improved the performance

from an average turnaround time of nineteen days to a time of forty-eight hours (Cheah 2002).

Consistent with dialectical model, the research design was divided into two stages: a 'conceptual stage' covering the first two dialectics and an 'action research stage' covering the last two dialectics.

During the conceptual stage a theoretical model was created to introduce Business Process Reengineering to the insurance company's claims process. It involved unstructuring the problem situation, expressing it, developing a root definition and preparing and testing a conceptual model. It included a literature review as well as interviews of subject experts to develop the conceptual model.

During the action research stage the conceptual model developed was compared with reality and feasible and desirable changes were implemented and action was initiated to improve the problem situation.

The research was conducted through two major action research cycles in which several mini-cycles were embedded. In the first action research cycle a reengineering of the business process was carried out by a team in the organisation. The second action research cycle resulted in the application of technology to speed up the motor claims.

Action Research Cycle 1

In the first dialectic the reengineering team immersed themselves in reality to study the current state of motor claims approval. This resulted in the mapping of the existing workflow for motor claims approval. In the second dialectic the team redesigned the ideal motor claims approval from a 'clean sheet' by forgetting the experience of reality. In the third dialectic the team compare the ideal with the reality to note the differences that resulted in proposals of improvements to reality. In the fourth dialectic purposeful action was taken by removing bottlenecks in the workflow

and the development and use of a new database for motor spare parts and a standardised electronic adjuster's report.

The result of the first action research cycle was the reduction in the average number of days required for motor claims from nineteen days to six days. But this was not enough so they carried out another action research cycle.

Action Research Cycle 2

The purpose of the second cycle was to investigate whether further reengineering (of the front office processes) and the use of technology would help them to reduce the time further.

In the first dialectic the team immersed themselves into the reality of the first prototype that was developed in the first action research cycle. This started off with the mapping of the new workflow as it occurred for motor claims. In the second dialectic an ideal workflow was again developed using a new technology they had been exposed to recently. A new workflow using digital imaging technology and electronic communication systems was developed. In the third dialectic the ideal and actual situations were compared to note the differences. In the fourth dialectic feasible and worthwhile changes to the workflow were implemented. Testing was conducted and further improvements were made.

In the end the target of forty-eight hours set out in the beginning of Cheah's research was achieved.

Cheah You Sum used the dialectical process in preference to the four-step model as he found it easier to explain to the teams in his organisation and use it. However the processes used actually implemented the seven-steps of Checkland's model which Cheah was familiar with.

Conclusions

In this paper we have shown how the dialectical version of SSM model was used effectively by researchers to address soft, complex industry problems in two applications. In Case Study 1, SSM was used to address an engineering problem, while in Case Study 2, SSM was used to improve business process and competitive advantage in the insurance industry. Both researchers who used SSM preferred to use the dialectical model as they found it less confusing and more attuned to action. The dialectical model added an 'action-orientation' to the application of SSM while using action research approaches.

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Associate Professor Shankar Sankaran
Dr Tay Boon Hou & Dr Cheah You Sum
Graduate College of Management
Southern Cross University, NSW, Australia

People

New members of ALARPM all (except the first one) joined at the World Congress in Pretoria

A warm and heartfelt welcome goes out to all new members of ALARPM.

■ Susan James comes from Ferntree Gully, Victoria in Australia. Sue is a self-employed facilitator and consultant, who works with a range of non-profit organizations across education, community and health & welfare sectors. She has a strong interest in appreciative inquiry as an approach to change.

■ Joanna Kozuba-Kozubska of West Yorkshire, UK is with J Group International, and has interests in particularly in manager and leadership development, and post-graduate qualifications.

■ Edwin Tjale from Gauteng, South Africa is the Chief Executive Officer of the Action Learning Business School Netherlands (BSN).

■ Michelle Frauendorf is from Pretoria, SA and works as the Regional Academic Manager at Technikon, SA. Michelle has many interests, including learning organizations, Education and Manager and Leadership Development.

■ Dennis Nyengwa is also from Gauteng, SA and works as the Manufacturing Development Specialist at South African Breweries. His interests involve working with children in primary education and with pensioners.

■ Sheila Clow, of Capetown, SA, is an Associate Professor at the University of Cape Town in the Division of

Nursing and Midwifery. Sheila has interests in human services, social justice and action research.

- Adriana Beylefeld of Bloemfontein, S.A. is a Senior Lecturer at the University of the Free State. Her interests include curriculum development and methodology.

- Sara Sywulka comes from Ithaca, USA . Sara is a research assistant at Cornell University, and her interests include HIV/AIDS prevention, working with youth and community development.

- David Maunders of Melbourne, Australia is a Professorial Fellow at Victoria University. David's interests include adult education and community development.

- Sonia Ospina lives in New York City, USA and is a Professor at Wagner Graduate School of New York University. Sonia is involved in participatory action research, including dialogue techniques and leadership for social change.

- Moses Makgato is from Pretoria, South Africa and works as a Lecturer at Technikon Northern Gauteng. Moses is interested in AR methods, evaluation, higher education and vocational education.

- Jill Sanguinetti of East Brunswick, Australia is a Lecturer with the School of Education at Victoria University (renewal of membership – not a new member). Her particular focus is on action research as academic research.

- Keiko Goto is from Anderson, California in the USA. Keiko is a Doctoral Candidate at Cornell University, and works with the application of participatory approaches in nutrition and health, position.

- Marie Dreyer is from Johannesburg, South Africa. A Senior Lecturer at Technikon Witwatersrand, Marie's

work involves developing concept maps as a learning strategy in English vocabulary learning.

- Cheryl McCrindle, of Pretoria/Tshwane, South Africa, is a Professor with the Faculty of Veterinary Science at the University of Pretoria. Her interests include agriculture, Veterinary Science and Public Health.

- Monica Ruiz-Casares is a Doctoral Candidate at Cornell University comes from Madrid, Spain. Her work involves using action research to build capacity among children and communities to monitor/evaluate their own change.

- Ilarius Smitm from Brafte, South Africa, is a Minister with the Dutch Reformed Church. Ilarius is interested in the local rural congregation as a learning organization, with a focus on sustainable community development.

- Peter Mellalieu is of Auckland, New Zealand. Peter is the Director for Action Learning at the Centre for Innovation and Entrepreneurship. His work involves industrial innovation and entrepreneurship in small/medium/high ambition enterprise. He is also involved in post graduate education, and business creativity and strategic thinking.

- Hentie Wilson is a Learning Developer at the University of South Africa in Pretoria As a learning developer, she manages team-based course design and development using action research and/or action learning. As staff developer, she was involved in starting a learning group at Unison. She is also involved as in Masters study as well.

- Lisa Zanetti, of Columbia, Maryland, USA, is an associate professor at the University of Missouri-Columbia. She is interested in working with citizens and public servants.

- Marianne Ekman Philips comes from Stockholm Sweden. Marianne is a Researcher at the National Institute Working Life, and active with many projects. Her particular interests include organizational development, regional development, social constructivism and participation.

- Beth Maina Ahlberg, of Uppsala, Sweden, is the Head of Research at the Skaraborg Institute for Research and Development. Beth is currently working with issues of health and gender, particularly in community organization in Eastern Africa and Sweden.

- Marietjie van der Merwe comes from Gaborone, Botswana. A lecturer from the University of Botswana, Marietjie is interested in the development of extension services, especially in terms of empowerment and transformation.

- John Rapano lives in Uniontown, Pennsylvania in the USA. John is an Instructor at Penn State Fayette, with interest in using participatory action research to empower low income people and the human service workers that work with them.

- June Pickett Dowdy is the Interim Vice-President for University Advancement at California University of Pennsylvania, in the USA. June's interests focus on higher education policy making.

- Daniel Welliver is from Pennsylvania, in the USA. Daniel is the Director of Education and Community Services for the Pennsylvania Human Relations Commission. He is interested in using participatory action research for the elimination of racism (apologies for incorrect spelling of name in the Networking Directory).

- Barbara A. Feroz comes from Seneca, Pennsylvania in the USA. Barbara is currently a doctoral student at Indiana University of Pennsylvania; the focus of her

dissertation is altering power dynamics through action research approach (apologies for incorrect spelling of name in the Networking Directory).

- David Mulama Amudavi, lives in Nakura, Kenya. David is a doctoral student at Cornell University, in the USA, and is interested in participatory action research for rural community development.

- Vijai Krishna Rajagopal comes from Bangalore, Karnataka in India. Vijai is interested in how action learning/action research can improve organizational effectiveness in educational sector).

- Hélène Grégoire is from Toronto, Ontario, Canada. Hélène is a PhD Candidate, Cornell University with interests in gender, learning organizations and social justice.

- Laurie Ann Vasily comes from Boston, Massachusetts, in the USA. Currently working in Nepal, Laurie is a Doctoral Candidate at Cornell University. Her interests include community-university partnerships, participatory adult education processes, social justice education, social movements and international development.

- Margo Hittleman, from Ithaca, New York in the USA, is a PhD Candidate at Cornell University. She focuses on action research and community-based adult education, grassroots leadership development, "critically-transformative" pedagogy, learning in social movements, AR theory and method, and the development of AR practitioners.

- Janinka Greenwood comes from Christchurch, New Zealand. A Principal Lecturer at Christchurch College of Education, Janinka's interests include higher education, organizational change, and drama and art.

Conferral of three Life Memberships at the 2003 AGM in Pretoria, South Africa

It is fitting to recognise an outstanding partnership between three women members of ALARPM who have, together, provided much of the glue that has held ALARPM together over many years and been in part responsible for it being in the stable financial situation it is now in.

The three-person team – of Anne-Marie Carroll, Lyn Cundy and Joan Bulcock – has served as the core of ALARPM administration for several years now. They have all also made many other contributions to ALARPM (e.g., Lyn as ALAR Journal editor, producer of Networking Directory and ALAR Journals and support for Joan and Anne-Marie as Treasurers; Joan as Treasurer and with the Brisbane Conference Group; Anne-Marie as Treasurer on the Executive, anchoring liaison with the last World Congress, and so on). Most long-serving and central to our esteemed trio is Anne-Marie Carroll.

Anne-Marie Carroll

In 1991 Anne-Marie was one of the first members of the newly formed ALARPM Association. In early 1992 she joined the World Congress 2 Organising Committee with the specific role of gaining sponsorship as well as making a general contribution to the Congress. She had resigned from full time work after the birth of her son Sean the previous year, and, instead of consulting as planned, ended up working for the Congress almost full time for some months.

The following details her many subsequent roles and contributions, although the 'facts' do not tell the detailed story of micro activity, sacrifice, late nights, fun-filled moments, horror-filled moments!, endless communications, and so on :

July 1992	Congress and ALARPM's first AGM – took on the Treasurer role;
1993	Treasurer and member of Management Committee, liaison with World Congress 3 in Bath;
1995	Treasurer, member of Management Committee, member of Practitioner Development Group, Co-convenor (with Ron Passfield) of "Moving On", a one day conference in Brisbane exploring the cutting edge of action learning, action research and process management;
1996	Treasurer, member of Management Committee, Co-convenor (with Kay Dickie and Pamela Kruse) of "Energy Switch", a one day conference in Brisbane focused on the creation of positive energy through AL, AR & PM;
1997	Treasurer, member of Management Committee, member of Organising Committee for Conference "Action for a Better World";
	Convened Brisbane Conference group formed as conscious attempt to extend capacity beyond members of the Management Committee – Brisbane group continues today including core members from that time (Pamela Kruse, Joan Bulcock, Bob Dick);
1998	Elected as Vice-President (Australia) at AGM, assistant to Treasurer (Joan Bulcock) and member of Liaison Committee for World Congress 5&9;
1999	Vice-President (Australia), assistant to Treasurer, member of Liaison Committee for World Congress 5&9;

2000	Management Committee member, assistant to Treasurer and facilitator for Executive meetings. Member of Liaison Committee for World Congress 5&9 and heavily involved in financial issues and promotion of World Congress;
2001	Elected as Treasurer, member of Executive, liaison with World Congress 6&10;
2002	Treasurer, member of Executive, liaison with World Congress 6&10;
2003	Treasurer, member of Executive, liaison with World Congress 6&10. Resigned from Committee of Management September, AGM Pretoria. Nominated for life membership.

In summary, Anne-Marie has served ALARPM as:

- *Treasure*r from 1992 to 1998 and again from 2001 to 2003;

- *Vice-president* (Australia) from 1998 to 2000;

- *Member* of Organising/or Liaison Committees for four World Congresses;

- *Co-convenor* of three ALARPM conferences and contributed to establishing the Brisbane Conference Group which continues today;

- *Practical administration* from 1992 to 1998 and 2001 to 2003 (with some paid assistance from 1994 to 1998 and great unpaid support from Joan Bulcock and Lyn Cundy from 2001 to 2003, and part of "administrative team" from 1998 to 2001.

Lyn Cundy

Lyn got involved with ALARPM initially through working with Anne-Marie Carroll. In 1996 Lyn took on some paid administration tasks. The actual time she spent was much

more than she was being paid for and eventually, she felt that she couldn't keep being paid when others (e.g., Joan and Anne-Marie) were not and moved completely to a volunteer role. Her normally impeccable logic was at this time overwhelmed by her equally strongly principled stand for equitable relationships.

Since then she has continued to make a contribution to ALARPM as part of the Brisbane administration team, producing the Networking Directory for several years, desk-top publishing the very first ALAR – Action Learning Action Research Journal in July 1996. Ron Passfield appointed her as Associate Editor for the second journal and she took over from him as Editor in April for issue Vo1 5 No 1 2000. She has produced 15 issues in a total of 7 years so far in an Editorship that is continuing. She gave a lot of support to Joan as Treasurer and played a particularly valuable role in the lead up to the Ballarat Congress through endless iterations of the budget with Di Seekers and Anne-Marie as urgent work turned a potential massive loss into a surprising surplus. She joined the Management Committee in July 1998 and served as Secretary for three years, and then as a Committee Member until 2003 - 5 years in total.

The journal is the main face of the organisation for most members and Lyn has done a brilliant and rather lone job of making a corker happen every time. She has mastered how to introduce photographs and a smart new cover, and kept faith with creating a practitioner/everyday theorist's journal to which all members can feel able to contribute.

Lyn has also held responsibility for the safe keeping and sales of ALARPM's various publications and these, along with ALARPM's records (including full e-records), have resided in her lounge room. She is very much looking forward to passing the records over to their new keeper!

Joan Bulcock

Joan has been a core member of the Brisbane Conference Group since 1997 and has consistently taken on a major administrative and organising workload. She was a major contributor to the following Brisbane conferences:

1997 – Brisbane – *Action for a Better World*

1998 – Brisbane – *Solutions Outside the Square*

1999 – Brisbane – *Success in a Complex and Uncertain World*

2001 – Brisbane – *Different Journeys*

2003 – Brisbane – Surfing the Waves of Change

In addition, Joan has been part of the organising group for ongoing Brisbane events – Philosophy Cafes, Facilitators' Markets and Communities of Practice. In 2003, Joan provided support for the SCIAR/ALARPM National Conference held in Coolangatta/Tweed Heads that was convened Shankar Sankaran.

Joan was also Treasurer of ALARPM from 1998 to 2001 which included the period of the Ballarat World Congress. She was therefore a significant contributor to the Congress and to the sometimes difficult and very time consuming resolution of difficult financial dilemmas. Members might remember her gracious presence at the ALARPM "table" at the Ballarat Congress as she once again missed much of the Congress Program as she has at most ALARPM conferences.

Although the extra demands of the Treasurer's role rather "burnt her out" in the process – something that is also always a sign of a person's commitment and desires to meet those needs – Joan contribution to ALARPM has been maintained. She continued as assistant to the Treasurer until 2003, as well as her Brisbane Conference Group role.

While Joan is there quietly and gently contributing in a modest and unassuming manner, we mention in passing that

there has been known to be, nevertheless, a racy little sports car that expresses something of Joan's sprit and energy, from which ALARPM has so benefited. Joan is also noted for the fabulous home cooked food which she manages to whip up in a trice to support committee members during meetings and working parties.

We feel very strongly that Joan's contribution to ALARPM has been enormous, and sustained over a long period.

In conclusion

It is our great honour, on behalf of our full membership, to offer these three women this award and these African gifts as tokens of the award which - while minor in the light of their immense contribution to our organisation - is nevertheless the highest honour ALARPM has in its power to give to you.

Anne-Marie, Lyn and Joan – with our deep thanks, you now have life membership of ALARPM – and join the company of our other esteemed life members, Paul Inglis, Ortrun Zuber-Skerrit, Ron Passfield, and Orlando Fals Borda.

Yoland Wadsworth

President of ALARPM

Guidelines for contributors

Contributions to this journal

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

We welcome contributions in the form of:

- articles (up to 10 A4 pages, double spaced)

- letters to the editor

- profiles of people (including yourself) engaged in action research or action learning

- project descriptions, including work in progress (maximum 1000 words)

- information about a local action research/action learning network

- items of interest (including conferences, seminars and new publications)

- book reviews

- report on a study or research trip

- comments on previous contributions

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

Contributed case study monographs

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

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

- completed cases, successful and unsuccessful;

- partial successes and failures;

- work in progress;

- within a single monograph, multiple case studies which illustrate important issues;

- problematic issues in current cases.

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

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

You may have interesting case material but may be uncertain of its theoretical underpinning. If so, approach us. We may offer joint authorship with an experienced collaborator to assist with the reflective phase of the report.

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

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

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

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Membership information and subscription forms

ALARPM individual membership subscription

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

ALARPM membership also provides information on special interest email networks, discounts on conference/seminar registrations, and a membership directory. The directory gives details of members in over twenty countries with information about interests and projects as well as contact details. The ALARPM membership application form is below.

ALARPM organisational membership subscription

ALARPM is also keen to make the connections between people and activities in all the strands, streams and variants associated with our paradigm – including action learning, action research, process management, collaborative inquiry facilitation, systems thinking, organisational learning/development, for example, and with people who are working in any kind of organisational, community, workplace or other practice setting; and at all levels.

To this end we now have the capacity to invite organisational memberships – as Affiliates or Associates of ALARPM. We are currently trialling this new form of membership with some innovative ideas which we hope your organisation will find attractive. We are very much aware that potential member organisations vary in size and resources and with this in mind, we invite you to make contact and negotiate a customised organisational membership. As a starting point, please complete the Organisational Membership Application Form below and send it to the relevant convenor:

Yoland Wadsworth Europe & Asia
        ywadsworth@swin.edu.au

Susan Boser   North America
        sboser@iup.edu

Lou de Castro Myles South America & Africa
        Lou.Myles@det.qld.gov.au

The following describes a starting point for further discussion:

Affiliate and Associate Organisational Membership

Affiliate and Associate organisations pay the same modest membership subscription as an individual member and for that they will receive:

- The voting rights of a single member;

- Member discounts for one person (probably a hard-working office-bearer);

- One hard copy of the journal and the directory (which can be circulated and read by all members, office holders and people attending meetings);

- The right to a link from the ALARPM website <http://www.alarpm.org.au> to your website if you have one. Our new website will be completed soon and

your organisation may write its own descriptive paragraph to go with its link;

- Occasional emails from ALARPM about events or activities or resources that you may like to send on to your whole membership.

- Members of organisations who become ALARPM Affiliates or Associates may also chose to become an individual member of ALARPM for 40% the normal cost (so they can still belong to other more local and specialist professional organisations also…). We believe this provides an attractive *cost and labour free benefit* that your organisation can offer to its own members;

- And, if 10 or more of your members join ALARPM, your own organisational membership will be *waived;*

- Members of ALARPM Affiliates or Associates who join ALARPM individually will receive full individual membership and voting rights, world congress and annual conference discounts (all they need to do is name the ALARPM Affiliate or Associate organisation/network on their membership form).

<u>**Please note**</u>: members of ALARPM Affiliates or Associates who become discount individual ALARPM members receive an e-version of the journal and membership directory rather than a hard copy.

ALAR Journal subscription

A subscription to the ALAR Journal alone, without membership entitlements, is available to individuals at a reduced rate. Subscription for libraries and tertiary institutions are also invited. The ALAR Journal subscription form follows the individual and organisational ALARPM membership application forms.

INDIVIDUAL MEMBER SUBSCRIPTION FORM

❖ *I wish to apply for membership of the Action Learning, Action Research and Process Management Association Inc.*

Personal Details

Mr/Ms/Mrs/Miss/Dr		
given names (underline preferred name)		*family name*
Home address		
		Postcode
Town / City	State	Nation
Home contact numbers	Phone	Fax
Email		Mobile

❖ Please send mail to: ❑ Home ❑ Work

Current Employment

Position / Job Title	Organisation	
Address		
		Postcode
Town / City	State	Nation
Work contact numbers	Phone	Fax
Email		Mobile

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

_____

❑ Action Learning
❑ Action Research
❑ Community Action/Dev
❑ Education/Schools
❑ Environment/Sustainability
❑ Evaluation
❑ Facilitation of AR, AL, etc.
❑ Gender Issues
❑ Government
❑ Higher Education
❑ Human Services (Health)
❑ Learning Organisations
❑ Other

❑ Manager & Leadership Dev
❑ Methodology/Methods
❑ Org Change & Dev
❑ PAR
❑ Process Management
❑ Quality Management
❑ Rural/Agriculture
❑ Social Justice/Social Change
❑ Systems Approaches
❑ Teacher Development
❑ Team Learning & Dev
❑ Vocational Education/HR

_____

❖ *Do you wish to be linked with a world network of people with similar interests and have your information included in our database and appear in our annual networking directory?*

❑ *Yes* ❑ *No*

❖ *Please complete payment details overleaf* ▸ ▸ ▸ ▸ ▸ ▸

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

Payment Details

Category of subscription (all rates include GST)

Mailing address within Australia

❑ $93.50 AUD   Full membership for people with mailing address *within* Aus

Mailing Address outside Australia

❑ $104.50 AUD   Full membership for people with mailing address *outside* Aus

Concessional membership within or outside Australia

❑ $49.50 AUD   Concessional membership for people with a mailing address within or outside Australia. The concessional membership is intended to assist people, who for financial reasons, would be unable to afford the full rate (eg. full-time students, unwaged and underemployed people).

Method of payment: ❑ Cheque/Bank Draft   ❑ Money Order

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

Card No: ❑❑❑❑   ❑❑❑❑   ❑❑❑❑   ❑❑❑❑

Cardholder's Name: ❑❑❑❑❑❑❑❑❑❑❑❑❑❑❑❑

Cardholder's Signature:_____Expiry Date: /   /

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

ALARPM ASSOCIATION INC.
PO Box 1748, Toowong Qld 4066, Australia

Phone: **(61-7) 3875 6869** *(Margaret Fletcher, Secretary)*
Fax: **(61-7) 3342 1669**
Email: **membership@alarpm.org.au**

ORGANISATIONAL MEMBER SUBSCRIPTION FORM

❖ *We wish to apply for membership of the Action Learning, Action Research and Process Management Association Inc.*

☐ *As an Affiliate Organisation (with primary purposes being action research, action learning, systems methodologies or a related methodology)*

☐ *As an Associate Organisation (with primary purposes that are not specifically one of these methodologies)*

Organisational Details

Organisation name			*If incorporated*
Contact address			
			Postcode
Town / City		*State*	*Nation*
A/H contact numbers	*Phone*		*Fax*
Email			*Mobile*

❖ *Contact person/Please send mail attention to*_____

Nature of Organisation

Please say if your organisation is an Association, Society, Group, Network, Collective, Informal/Community, Set, Department, Business, Institute, Centre, Library or other configuration.	
How many members (approximately) does your organisation have?	*Do you know how many are ALARPM members? Is so how many?*

❖ *What are your organisation's interests/projects relating to action learning, action research and process management?*

_____

❖ *Your organisation's focus is:*

☐ Action Learning
☐ Action Research
☐ Community Action/Dev
☐ Education/Schools
☐ Environment/Sustainability
☐ Evaluation
☐ Facilitation of AR, AL, etc.
☐ Gender Issues
☐ Government
☐ Higher Education
☐ Human Services (Health)
☐ Learning Organisations
☐ Other

☐ Manager & Leadership Dev
☐ Methodology/Methods
☐ Org Change & Dev
☐ PAR
☐ Process Management
☐ Quality Management
☐ Rural/Agriculture
☐ Social Justice/Social Change
☐ Systems Approaches
☐ Teacher Development
☐ Team Learning & Dev
☐ Vocational Education/HR

_____
Please specify

❖ *Do you wish to be linked with a world network of people with similar interests and have your information included in our database and appear in our annual networking directory?*

☐ *Yes*   ☐ *No*

❖ *Please complete payment details overleaf* ▸ ▸ ▸ ▸ ▸ ▸

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

❖ *Please note that the cost of organisational membership (affiliate and associate) is the same as for individual full membership. There is no concessional membership fee, but if an organisation has 10 or more individual members of ALARPM (or 10 or more who would like to be electronic –only members) then organisational membership is free.*

Payment Details

Category of subscription (all rates include GST)

Mailing address within Australia

❑ $93.50 AUD   Full membership for organisations with mailing address *within* Aus

Mailing Address outside Australia

❑ $104.50 AUD   Full membership for organisations with mailing address *outside* Aus

Method of payment: ❑ Cheque/Bank Draft   ❑ Money Order

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

Card No: ❑❑❑❑ ❑❑❑❑ ❑❑❑❑ ❑❑❑❑

Cardholder's Name: ❑❑❑❑❑❑❑❑❑❑❑❑❑❑❑

Cardholder's Signature: _____ Expiry Date: /   /

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

ALARPM ASSOCIATION INC.
PO Box 1748, Toowong Qld 4066, Australia
Fax: (61-7) 3342 1669

Email:
Yoland Wadsworth   Europe & Asia   **ywadsworth@swin.edu.au**
Susan Boser   North America   **sboser@iup.edu**
Lou de Castro Myles South America & Africa **Lou.Myles@det.qld.gov.au**

ALAR JOURNAL SUBSCRIPTION FORM

Address Details

Mr/Ms/Mrs/Miss/Dr			
Contact Name *given names*			*family name*
Organisation			
Address			
			Postcode
Town / City		*State*	*Nation*
Contact numbers	*Phone*		*Fax*
Email			

Payment Details

ALAR Journal subscription (2 Journals per year) does not include ALARPM membership entitlements (all rates include GST).

ALAR Journal Subscription rate for private individuals

❑ $ 71.50 AUD   for individuals with a mailing address *within* Aus
❑ $ 82.50 AUD   for individuals with a mailing address *outside* Aus

ALAR Journal Subscription rate for libraries and tertiary institutions

❑ $ 93.50 AUD   for institutions with a mailing address *within* Aus
❑ $104.50 AUD   for institutions with a mailing address *outside* Aus

Method of payment: ❑ Cheque/Bank Draft   ❑ Money Order

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

Card No: ❑❑❑❑   ❑❑❑❑   ❑❑❑❑   ❑❑❑❑

Cardholder's Name: ❑❑❑❑❑❑❑❑❑❑❑❑❑❑❑❑

Cardholder's Signature: _____ Expiry Date: /   /

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

ALARPM ASSOCIATION INC.
    PO Box 1748, Toowong Qld 4066, Australia

Phone: **(61-7) 3345 7499** (*Lyn Cundy, Editor*)
Fax: **(61-7) 3342 1669**
Email: **alar@alarpm.org.au**