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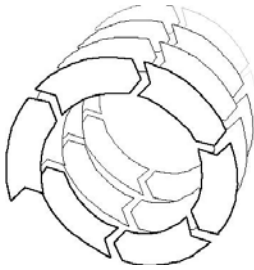
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CONTENTS

Editorial

Welcome to the second issue of the *Action Learning and Action Research Journal* for 2017. This issue includes two longer articles (we normally publish papers of up to 5,000 words), as well as information about the keynote speakers at the 2018 World Congress and the future directions for the *ALARj*.

Elizabeth Orr presents our first article on action research for good practice by Aboriginal hospital liaison officers and social workers. The article describes the methodology developed for her doctorate studies.

The health of the Australian Indigenous communities is an area of significant concern to most in the health industry, and should be a similar concern to all Australians. The hospitalisation rate of Aboriginal and Torres Strait Islander people, for example, is three times that of other Australians.

Victoria introduced Aboriginal Hospital Liaison Officers (AHLOs) in the 1980s, and Orr's study looked at the relationships between AHLOs and social workers, seeking to identify lessons about those relationships that would influence the training of future AHLOs and social workers. The focus of this article, however, is about the process of the study, rather than its findings, which Orr is separately sharing with participants, decision makers, and influencers and advocating the further development and support of the identified elements of good practice.

Orr developed a research design with thirteen elements, including scoping and ethics, an Aboriginal Critical Reference Group, an Indigenous-informed ethnographic action research (EAR) methodology and semi-structured interviews (see diagram on page 28). It is also her analysis of her own position and values, and the

involvement of participants or co-researchers that are so important in this study.

> Drawing upon a multilayered research heritage informed by Indigenous methodologies and an Indigenist research paradigm, my research and standpoint were framed as that of an Indigenous ally (p. 18).

Her analysis of the thirteen elements of the research design reflects the care taken in that design and the communication and collaboration so necessary for an effective action research project.

The second article is from Bronwyn Mehorter, who presents a longitudinal study of the implementation of action learning for teacher professional development in New South Wales in Australia.

After describing some variations in form of action learning and several action learning projects conducted in schools, Mehorter introduces the school in NSW that commenced a small action learning project. This project was 'aimed at increasing student engagement during the Literacy Block, with the hope that it would increase student literacy outcomes and their basic skills' (p. 55). It involved just four teachers when it commenced in 2005.

Concerns emerged from this project, including

> effective dissemination or 'spill over' of new learning to the whole staff, the sustainability of the project in light of staff leaving for positions within other schools, and perceptions of elitism toward the staff who were involved (p. 56).

Those concerns were similar to those in other projects, and they led to the expansion of the project to a whole-of-school project.

Mehorter describes the structure of this broader project and the effects it had. The benefits continued over many years, and the impact continued to developed, which is where the advantages of this longitudinal study arise. As the program entered its second decade, the input and control of the teachers, and the role of the facilitator (Academic Partner), evolved, and the teachers

developed a range of action learning projects (23 in total). These projects included:

> Establishing a 21st Century Learning Environment, Enhancing Social and Emotional Awareness of Students, Improving Reading Strategies in Year 1, [and] Using Data to Improve Teaching Practice and Reflective Writers (p. 65).

This study demonstrates the power of an action learning project when given the time to develop with its participants.

Our third article is from Diane Kalendra and Andrew Cook, who present case studies from two organisations using action research to achieve major organisational change. In both cases, the organisations aimed to change to a market orientation (rather than other orientations, such as marketing orientation or product orientation). This change in orientation required a change in organisational culture, led from the most senior people in the organisations (amongst a number of other requirements).

> Market orientation is a broader concept than marketing orientation, for it ceases to be a function and becomes an organisation's way of doing business ... The development of a market orientation is a long-term process and represents an investment in the future of the organisation (p. 72).

The two authors used action research in their respective organisations to help those organisations change. The first organisation was a small intermediary insurance broker.

> Action research was considered an appropriate methodology for this study because it can help organisations to develop their capacity to learn how to change practices, processes and cultures for the successful implementation of change programs (p. 80).

The second organisation was a large government business enterprise, equally well suited to an action research project to reorientate itself and its staff. The authors describe the research, the data collection, results and reflection on the two projects. That reflection includes a comparison between the two projects – one in a small organisation where the author / lead researcher had

considerable influence on the project's progress, while the second was in a very large government enterprise, where the sponsor (who was not the author / lead researcher) had doubts about the project methodology. Both projects, however, produced useful outcomes for their respective organisations.

The next item in this issue is an announcement about the keynote speakers at the ALARA 2018 Action Learning Action Research and Participatory Action Research World Congress. ALARA is very pleased to have a diverse group of keynote speakers:

- Dr Hilary Bradbury from USA

- Professor Jack Whitehead from UK

- Dr Mary Brydon-Miller from USA

- Dr Ernie Stringer from Australia

- Her Excellency, Professor Hassana Alidou, Ambassador of the Republic of Niger to the United States

I encourage you to consider attending the World Congress at Norwich University in Vermont, USA on 17-20 June 2018.

The final item provides some insight into the future directions of this publication (and associated publications by ALARA). The ALARA Management Committee welcomes collaboration in developing its publications, and I invite you to read this item and then contact ALARA to join us.

Colin Bradley
December 2018

Action Research about Good Practice by Aboriginal Hospital Liaison Officers and Social Workers in Hospitals in Victoria

Elizabeth Karen Orr

Abstract

This article describes the methodology developed for a PhD study to explore the perceptions of Aboriginal Hospital Liaison Officers (AHLOs) and non-Aboriginal social workers about what they understand to be good practice in their work that leads to the best possible outcomes for Aboriginal patients in hospitals in Victoria.

A methodology that would facilitate building relationships and trust with Aboriginal and non-Aboriginal people in a short time and within the structured setting of hospitals was essential. Integral to the action research study design was the involvement of research informants and other Aboriginal and non-Aboriginal people with knowledge about supporting Aboriginal patients in hospitals in the scoping, data analysis, and presentation of findings.

The sustained contribution of an Aboriginal Critical Reference Group was a critical factor for guiding the research to support implementation of Indigenous research principles and meeting NHMRC ethical guidelines for Indigenous health research

Ethical considerations, the theoretical position and values of the researcher and an explanation of the research design to address the question are outlined with the aim of sharing a practice example of action research. Participants shared experiences of working with Aboriginal people across general, specialist, urban, and regional hospitals in Victoria. The diverse narratives of good practice confirmed that there is a specific sociocultural practice with

Aboriginal people in hospitals across Victoria. Focussing on the strengths reported in the practice of AHLOs and social workers, principles for good practice with Aboriginal patients, their families, and their communities, were drawn from the study and are briefly summarised at the end of the article to indicate what the action research methodology facilitated.

Key words: Good practice, Aboriginal Hospital Liaison Officer, hospital social work

Research question

In every respect, Aboriginal Australians are the most disadvantaged group of people in Australia. The National Productivity Commission reports, Steering Committee for the Review of Government Service Provision (SCRGSP) 2009-2016, entitled *Overcoming Indigenous Disadvantage: Key Indicators* report against a range of indicators (there were 52 in 2016), about a range of areas including health, education, early childhood education, governance, leadership and culture and safety in communities. The reports are produced with input from all Australian governments.

The 2016 report, like earlier reports, demonstrates that in comparison with non-Aboriginal Australians, Aboriginal and Torres Strait Islanders experience:

- lower life expectancy;

- a lower year 12 education completion rate;

- a lower proportion of home ownership;

- lower employment and income levels;

- higher rates of child protection notifications and children in out-of-home care;

- higher infant mortality rates;

- higher incarceration rates for youth, men and women;

- a higher suicide death rate;

- a higher (six-fold) homicide death rate;

- a higher (12-fold) rate of hospitalisation for assault;

- double the hospitalisation admission rate for children; and

- much greater (four-fold) prevalence of hospitalisation for alcohol-related mental and behavioural disorders.

    (Steering Committee for the Review of Government Service Provision, http://www.pc.gov.au/research/ongoing/overcoming-indigenous-disadvantage/2016)

High levels of health inequality are associated with a greater need for, and use of, hospital services by Aboriginal people. The national hospitalisation rate (with disease-specific variation) for Aboriginal and Torres Strait Islander people by estimates is three times higher than that for other Australians (AIHW, 2015).

Evidence about negative hospital experiences and health outcomes for Aboriginal people, identifies support from Aboriginal staff, and AHLOs in particular, as pivotal for improving hospital stays and outcomes (Dwyer, Kelly, Willis, Glover, Mackean, Pekarsky and Battersby, 2011; Einsiedel, van Lersel, Macnamara, Spelman, Hefferman and Bray, 2013; Franks and Beckmann, 2002; Shahid, Bessarab, Howat, and Thompson, 2009).

AHLOs positions were introduced into hospitals in Victoria during the 1980s and initially were located in Social Work departments and 'supervised' by social workers. This study aimed to explore the current relationship between AHLOs and social workers in hospitals in Victoria. The study defined good practice from the combined experience and perspective of AHLOs and social workers by identifying what it is about AHLOs and social work practice that contributes to improved Aboriginal patient hospital experience and health outcomes. The research questions explored were:

1. What do AHLOs and social workers in Victorian hospitals identify as good practice and the factors that support good practice?

2. What are the learnings from this study that can inform training of Aboriginal workers and training and professional development for social workers?

Ethics

The long history of negative research outcomes for Aboriginal and Torres Strait Islander people in Australia, due to viewing Indigenous people through European worldviews and knowledge systems is well documented. For example, Malin, Franks and Cooperative Research Centre for Clinical Research Excellence (2007, in Laycock, Walker, Harrison and Brands, 2011, p. 6) observe:

> Psychologists in the early 1900s gave Aboriginal people intelligence tests which were designed for European populations….When Aboriginal people did poorly on these tests, this confirmed to the Europeans that Aboriginal people were less intelligent and indeed, childlike in their thinking….These early researchers were unaware of their own ethnocentricity (i.e. judging other cultures through our own culturally biased filters) and how it resulted in racial stereotyping (and scientifically invalid conclusions).

The National Health and Medical Research Council (NHMRC) guidelines for health research with Indigenous populations specify that, to ensure respectful and engaged research, more information is required in ethics consideration in research involving Aboriginal and Torres Strait Islander people than is required for non-Aboriginal populations.

The additional information required by NHMRC includes a description of potential individual and collective benefits to or adverse effects on Aboriginal communities, and demonstration of the researchers' knowledge of and regard for cultural beliefs, values and activities (NHMRC, 2003). Indigenous methodologies and State and national guidelines for ethical research with Aboriginal and Torres Strait Islander people in Australia offer further guidance about the processes and skills required of non-Aboriginal researchers (NHMRC, 2003; Stewart and Pyett, 2005;

VicHealth Koori Health Research and Community Development Unit, 2008). The NHMRC guidelines were the key driver in supporting my ontological orientation. Respect for Aboriginal knowledges informed the methodology and the choice of methods used to gather, and subsequently interpret, the stories collected and analysed in this study.

Ethical considerations were not limited to formal requirements, as noted in the NHMRC guidelines for ethical research:

> It is possible for researchers to "meet" rule-based requirements without engaging fully with the implication of difference and values relevant to their research. The approach advanced in these guidelines is more demanding of researchers as it seeks to move from compliance to trust. (NHMRC, 2003, p. 4)

Full engagement with the knowledge systems, entities, and Aboriginal ancestors of this country is not possible in the same way for a non-Aboriginal researcher as it would be for a local Aboriginal researcher. Nevertheless, there remain responsibilities to ensure respect and to reach out to Aboriginal custodians, elders and leaders, and to acknowledge their relatedness in the places where the study is located. At the beginning of the study, I made a personal statement responding to the NHMRC's values and processes to guide research with Aboriginal, and Torres Strait Islander people. Although not formally required a personal statement addressing the values of reciprocity, survival and protection, respect for spirit and ways to apply such principles in this study were recorded in a reflective research journal and reference was made to these principles throughout the study. The ideas and principles were discussed with supervisors, an Aboriginal Critical Reference Group and my La Trobe University PhD research progress panel.

Methodology

The ethnographic action research methodology for this research is outlined in this section. The critical guidance of an Aboriginal

Critical Reference Group (CRG), the standpoint of the researcher, and the steps in the research design are discussed.

Aboriginal Critical Reference Group

The term `critical reference group' is used by Wadsworth to refer specifically to those people involved in the research whose shared values and practices are the source of decisive questions; those from the group or service providers whom can identify accurately what the needs of the group are and the best solutions; and those whom decide or can judge whether the actions or research recommendations 'get it right' and the needs or problem are addressed. In other language, these people can be named the researchers, the researched, those for whom the research is for – including the co-researchers, the population group whose interests are aimed to be met and those whom can influence or implement recommendations and actions from the research (Wadsworth, 1991, p. 7-9).

The establishment and activities of an Aboriginal CRG are an important and central part of the story of this research. The CRG actively informed the research questions, assisted in deciding upon the criteria for recruitment, and commented on data analysis processes. They continue to engage with me about the objectives, process, and ideas about sharing the findings of this study.

The establishment of an Aboriginal CRG early in the scoping of this research was important to meet NHMRC (2003) guidelines and to assist me to address Indigenous research principles (Wilson, 2007). In particular, they assisted to:

- confirm the relevance of the study;

- ensure the research was designed alongside and in the interests of Aboriginal people;

- support and guide my research processes to be respectful of Aboriginal protocols and the rights of Aboriginal participants; and

- provide advice about research processes to avoid because they may be disrespectful, distort or appropriate Aboriginal culture, practices, and knowledge.

It is acceptable ethical practice to name the cultural advisors (with their agreement) as a way of honouring their valuable contributions. The members of the Aboriginal CRG for this study were: Marlene Burchill, a Yorta Yorta and Dja Dja Dja Wurrung social worker with extensive experience as an action researcher and representation of Aboriginal people at local and government forums; Lorraine Parsons, a social worker with Aboriginal heritage with senior experience in health and government; and Jim Walker, a descendant of the Yiman and Goreng Goreng people in Queensland, who represents Aboriginal people at national and international forums about intellectual property, climate change governance and sustainability and repatriation of ancestral remains.

Researcher position and values

Feminist standpoint theory (e.g., MacKinnon, 2013; Collins, 2000) is credited by Harding (2003) as building upon earlier Marxist political and sociological critiques of epistemology and tools of knowledge making (Lukac, 1923; Simmel, 1921), and with aiming to challenge power imbalances implicit in positivist research. Elements of standpoint theory – in particular a commitment to ongoing engagement and attention to addressing disadvantage – are recognizable in Karen Martin's (2008) theory and application of indigenous methodology in the Australian context. Martin's explanations of seemingly simple phrases – Indigenous ways of knowing being and doing – expose the complexity of Indigenous epistemologies and arguably move feminist and de-colonising frameworks a further step towards transformative practice.

The context of this study, exploring the practice of AHLOs and social workers who work with the most structurally disadvantaged group of people in Australia, required deep reflexivity and a transparent conceptual framework. This was not only to 'do no

harm' (NHMRC, 2003), and to 'give voice' to examples of lived and grounded praxis but more importantly, to articulate relations between Aboriginal and non-Aboriginal workers in a powerful institutional setting and to consider what this means for challenging colonial practice and social relations in that setting at this point in time.

Awareness of "position" when designing research and interacting with participants is essential, because the researcher is not just "doing" the research but is always "in" the research, as a part of the story (Wright, 2011). According to grounded theorist, Kathy Charmaz (2014),

> We are part of the world we study and the data we collect. We construct our grounded theories through our past and present involvements and interactions with people, perspectives, and research practices (p. 10).

Similarly, Lee and Zaharlick (2013) note,

> The researcher's standpoint within any culture, as well as across cultures, and the researcher's 'intersectionality of identities' and similarities and differences with the group related to the topic of study always influence the research process (p. 4).

Drawing upon a multilayered research heritage informed by Indigenous methodologies and an Indigenist research paradigm, my research and standpoint were framed as that of an Indigenous ally. My education and training as a sociologist and social worker and work with Aboriginal people across Australia influenced both the choice of methods and knowledge frameworks engaged in this research. The formal and informal privileges of being a white, tertiary-educated female social worker operated in conscious and unconscious ways and at the individual, communal and institutional levels. Layers of family, work, and life experiences also shaped my values and identity. These experiences and my position influenced the design of this study.

Training in Western critical and feminist social work and sociology (Briskman, 2007; Dominelli, 2002; Smith, 1987; Weeks and Quinn,

1997) conferred a predominantly Eurocentric lens. Nevertheless, I believe the lessons and influence of Aboriginal teachers, work colleagues and friends, and life experience de-centred that dominating lens and acted as correctives. In addition, the burgeoning literature on Aboriginal social work and international Indigenous methodology (Bessarab and Ng'andu, 2010; Chilisa, 2012; Martin, 2008; Smith, 1999; Wright, 2011) — that has informed academia and practice and opened up new ways of listening, working and learning — both affirmed my position and influenced me substantially. I position myself as an ally to the cause of improving Indigenous health through supporting Indigenous rights to cultural identity, beliefs, ancestry, lands and waters, and in equal measure the right to all the services and knowledge that modern Western health and Australian culture has to offer its citizens.

Some of the considerations in the journey towards a suitable methodology – namely, ethnographic action research – are now discussed.

Ethnographic action research

Tacchi, Fildes, Martin, Mulenahalli, Baulch and Skuse (2007), researchers at the University of Queensland, have described the combination of two research approaches, which they use in International Development contexts, as ethnographic action research (EAR). The intention of EAR is to understand and disrupt the usual power relationships between the researcher and the subjects of the research through utilising methods that are acceptable, and sometimes defined and selected, by the people participating in the research. Tacchi, *et al.* (2007) give an example of the use of EAR to achieve emancipatory goals and avoid social domination by some groups in international development programs and evaluations of HIV/AIDS programs. Ethnographic stories of the experiences of AIDS patients provided qualitative evidence about the effectiveness (or otherwise) of these programs, and this enabled targeted changes to occur during the lifetime of the research.

In the current study, a broad EAR approach allowed me to form an extended relationship with participants at Indigenous health forums, during interviews, teleconference focus groups, and at Indigenous health conferences and workshops. An ethnographic approach enabled participants to share extended descriptions and stories of practice during semi-structured interviews, and a participant or member checking process supported the accuracy of the data. During the study, research participants endorsed a change from face-to-face meetings to the use of telephone focus groups.

A key objection to the EAR method from positivist and scientific research frameworks is the personal use of the self. Even proponents of the method recognize this as a challenge: 'ethnographers cannot take a field setting for granted but have to actively play a part in bringing it to life by asking questions about the relationship of the people to their setting' (Madden, 2010, p. 8). One response to such criticism is that all research involves use of the self and, as Wright (2011) notes, all research is a form of intervention whether acknowledged, disguised, or overlooked.

Key components of the EAR developed and used in the PhD study are as follows.

Critical ethnography

Lee and Zaharlick (2013) describe ethnography as a

> theoretically driven, systematic approach to the study of a
> social group's everyday life that allows the researcher to
> understand and see the sociocultural world of a social
> group from the members' own perspectives (p. 17).

They promote ethnography as a meta-framework for culturally competent social work research that permits the inclusion of quantitative and qualitative methods and the design, exploration and refinement of research questions.

According to Floresch, Longofer, and Suskewicz (2014), ethnography is a research methodology that has proven to be especially important for social work researchers because it enables

them to come to know the person in the environment. A specific form of ethnography, critical ethnography, is described by Thomas (1993) as the study of a culture studying cultures. Thomas notes that, while all cultures require interpretive reading, critical ethnography teaches researchers to understand their assumptions deeply and to practise reflexivity and create new readings and assumptions. Critical ethnography explores the context of meanings; it looks beyond what appears to be the case, and (specifically) seeks to uncover the processes of social domination. By digging deeper to discover what in social life promotes inequality, the method has a clear value stance.

> Critical ethnography is simultaneously hermeneutic and emancipatory; thus critical ethnography recognizes that 'meaning making' about data depends on where, and from whom, data is obtained (Thomas, 1993, p. 42).

This quote from Thomas anticipates Indigenous methodology scholar Linda Tuhiwai Smith's (1999) call to always consider whose knowledge is given voice and explained, and for what purpose.

Ethnography was considered an appropriate method and approach for this study because it is suited to the exploration of AHLOs' and social workers' understanding of Aboriginal culture and cultural knowledge as practitioners. Like other forms of action research, EAR creates opportunities for learning and changes in practice to be shared and implemented during the life of the research. However, it also entails a specific aim: to explore cultural phenomena from the view of participants involved in the study (Tacchi, *et al.*, 2007; Prichard, 2012). This aim mirrors the central values of reciprocity and transparency in action research (Wadsworth, 1984).
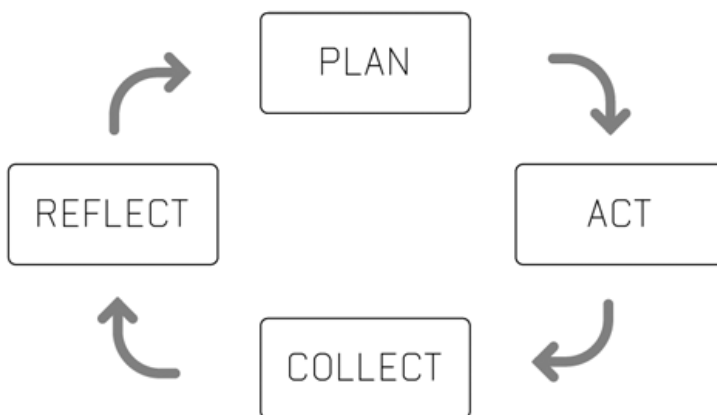
Action research

Action research is linked with education and liberation theology (Freire, 1972) and emancipatory and empowerment theories (Alinsky, 1969). In Australia action research is often been the preferred methodology used within the community, health and

welfare sectors (Wadsworth, 1991). It is for example, promoted as an evaluative method in government-funded programs such as by the Department of Social Services in the Reconnect Program 2000, the Stronger Families and Communities Program in 2004, and Building Safe Communities for Women and their Children in 2016.

Wadsworth (1991) and Stringer and Genat (2004) outline the key steps in cycles of action research as being Plan, Act, Collect/Observe and Reflect, which then inform further iterations of the same steps. In this way, changes made during the research are documented and can be used to inform further action and work in `real time'. Appropriate research processes are fundamental goals and often considered of equal importance to research outcomes. Figure 1 is a simple visual representation of the action research cycle.

Figure 1 The action research cycle (adapted from Lienert, 2002)

In an ideal version of the action research cycle, during the Plan stage, the researcher determines the problem to be solved in collaboration with the affected population, the steps to be taken to solve the problem, and the methods used to evaluate how successful the solution has been. In the Act stage, the designed plan is implemented, stakeholders are engaged, permissions and

protocols are agreed upon and the research steps are taken. In the Collect/Observe stage, the researchers collect data to determine whether change has occurred and what further action may be required to implement change. Tacchi, *et al.* (2007) refer to "Observe" rather than "Collect", and some researchers use these terms interchangeably. During the Reflect stage, the researchers analyse the data, discuss the findings, and evaluate the extent to which the action has helped to solve the problem. If using a participatory action research model, research participants are deeply involved during each stage of the cycle.

In the life of any research, there is overlap and retracing of some steps, and the following text should be considered with this in mind. The Plan stage of this PhD study was informed by my prior experience in Aboriginal health settings and involved consulting with relevant stakeholders, establishing the Aboriginal CRG, refining the research questions, undertaking a literature review and setting up ongoing literature alerts, obtaining ethical clearances, and developing the interview schedule. The Act stage involved recruiting participants, completing the in-depth interviews, conducting the telephone focus groups, conducting CRG meetings, and presenting to Aboriginal forums and conferences and taking on board feedback from these activities. The Collect stage involved transcribing the interviews and telephone focus groups, observations at forums and conferences, and continuing literature review and analysis. Finally, the Reflect stage involved analysing reflections in my research journal, coding and thematic analysis of the interview and focus group data, writing, and presenting and discussing findings with to the Aboriginal CRG. As this research was exploratory, it did not seek to evaluate any specific action.

Action research requires making values explicit; as noted earlier, a central principle is to involve those the research is about in the design, implementation, and sense-making of the project. Greenwood and Levin (2007) note that framing research questions in action research occurs at the 'borderline between local understanding and academic-based insights' (p. 679). Revisiting

the professional, personal, and political dimensions of action research, Noffke and Somekh (2009) argue that action research and feminism share 'underlying ethical and political commitments to democracy and social justice' (p. 163). Furthermore, they enact

> a critique of positivism, an analysis of power relations, a respect for the knowledge of the 'silenced', a critique of canonical positions, and a focus on transformative praxis (p. 163).

In a similar vein, Greenwood and Levin (2007) suggest that action research is not just a method of data collection and analysis but a methodology that explains the decisions made about how to collect data and seeks to make their links to theory and ideology transparent to the participants. Similarly, Wright (2011) argues that all research is a form of intervention in the lives of participants and communities, and it is beholden upon researchers to acknowledge their responsibilities and make intended transformation explicit.

As outlined by Pyett, Waples-Crowe and Van der Sterren (2013), participatory action research seeks to engage members of the groups involved in the research at all steps along the research journey. My study did not achieve this because the participants in the research were unable to be involved on the critical reference group but it was decided to proceed with the study guided by an action research approach. This decision was made in consultation with members of the Victorian Aboriginal Community Controlled Health Organisation (VACCHO) research team, and through presentations and discussions with members of Improving Care for Aboriginal Patients (ICAP) forum. Though there were limitations to the efficacy of the Aboriginal CRG, they did act as a proximate group to represent those the research aimed to benefit, because some of the members were both Aboriginal and social workers.

Engagement and use of ethnographic action research

The successful implementation of an EAR approach rests on the early engagement of participants and stakeholder. As suggested by Wicks, Reason and Bradbury (2008):

> The success or failure of an action research venture often depends on what happens at the beginning of the inquiry process: in the way access is established, and on how participants and co- researchers are engaged early on (p. 243).

Engaging both Aboriginal and non-Aboriginal participants in the scoping, meaning-making, and analysis of their stories of good practice was an indicator of the success of the research methodology. This was particularly well achieved through the Aboriginal CRG's ongoing involvement in reflections about the results of data analysis, and the participation of six of the 22 interviewees in telephone focus groups (after analysis of the interview data) to discuss themes and stories.

The knowledge and experience of the Aboriginal CRG provided local understanding (Levin and Herbert, 2005). By reporting to the potential beneficiaries and key stakeholders of the research—the AHLOs and social workers who attended the ICAP network forums – I kept them informed about how the research was proceeding through poster presentations.

The EAR design of this study required reflexivity. The inclusion of my auto-ethnographic reflections about the phenomena was part of the methodological process. As mentioned earlier, a reflective journal with a record of observations, ideas, events and questions and data codes and categories, also recorded reflections on key decisions, turning points in processes, thoughts, and aspects of analysis. Records of reflections on the research process, the literature and research activities made the journal a useful aid to data analysis and even provided an additional source of data. Thus, the action research cycle and the researcher's learning-story of the research journey became part of the data (Wadsworth, 2010).

Technically, this study included one cycle of the Plan, Act, Collect and Reflect cycle process of action research (Dick, 2009; Lienart, 2002; Wadsworth, 1991; Wadsworth, 2010), but the steps in the cycle informed all stages of the research and the researcher's approach. For example, the initial plan to invite participants onto the CRG was modified when it became apparent during

discussions with AHLOs and social workers at ICAP forums that it was not a feasible objective. The three members of the Aboriginal CRG agreed that such representation was not feasible given the many demands on these workers' time. The cultural advice of the Aboriginal CRG helped to ensure that Aboriginal and social worker perspectives continually informed the research, and that I adhered to Aboriginal research principles in the research design, data collection, and analysis.

The factors influenced by CRG and the feedback from ICAP forum members include the decision to base the study in Victoria, the decision to keep focus groups of AHLOs and social workers separate, and to use a teleconference format for focus groups rather than a face-to-face yarning circle.

Indigenist research principles informing the EAR methodology

The EAR methodology applied in this study utilised qualitative research methods and Indigenist research principles. Wilson (2007) makes the point that comparing an Indigenous research paradigm to a Western research paradigms falls into the trap of positivist binaries. Furthermore, he argues that as a legitimate and rigorous research paradigm, an Indigenist research paradigm is not dependent on the ethnicity of the researcher. From a diversity of sources[1], Wilson (2007) outlines the following principles for Indigenist research:

- respect the relationship and interconnection of all forms of life;

- conduct all actions and interactions in a spirit of kindness, honesty and compassion;

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[1] Acknowledging the *Proposal to Host Universities* of the International Indigenous Graduate Institute (2004) and the work of Indigenous scholars Cora Weber-Pillwax, Judy Atkinson, Karen Martin, Fyre Jean Gaveline, Stan and Peggy Wilson, Peter Hanohano, and Wilson himself.

- the reason for doing the research must be one that brings benefits to the Indigenous community;

- the foundation of the research question must lie within the reality of the Indigenous experience;

- any theories developed or proposed must be grounded in an Indigenous epistemology and supported by the elders and the community that shares this particular epistemology;

- the methods used will be process-oriented, and the researcher will be recognised and cognizant of his or her role as one part of the group in the process;

- recognition is made that transformation within every living entity participating in the research will be one of the outcomes of every project;

- the researcher assumes responsibility for the transformations and the results of the research projects(s) which he or she brings into a community;

- it is advisable that a researcher work as part of a team of Indigenous scholars/thinkers and with the guidance of elder(s) or knowledge-keepers;

- it is recognised that the integrity of any Indigenous people or community could never be undermined by Indigenous research because such research is grounded in that integrity; and

- It is recognised that the languages and cultures of Indigenous peoples are living processes and that research and the discovery of knowledge is an ongoing function for the thinkers and scholars of every Indigenous group. (p. 195)

These principles informed a key feature in the research design to establish and work with the guidance of an Aboriginal CRG. The CRG met on a regular basis for over three years.

The following figure seeks to represent the steps of the EAR methodology pictorially.

Fig. 2 Research design
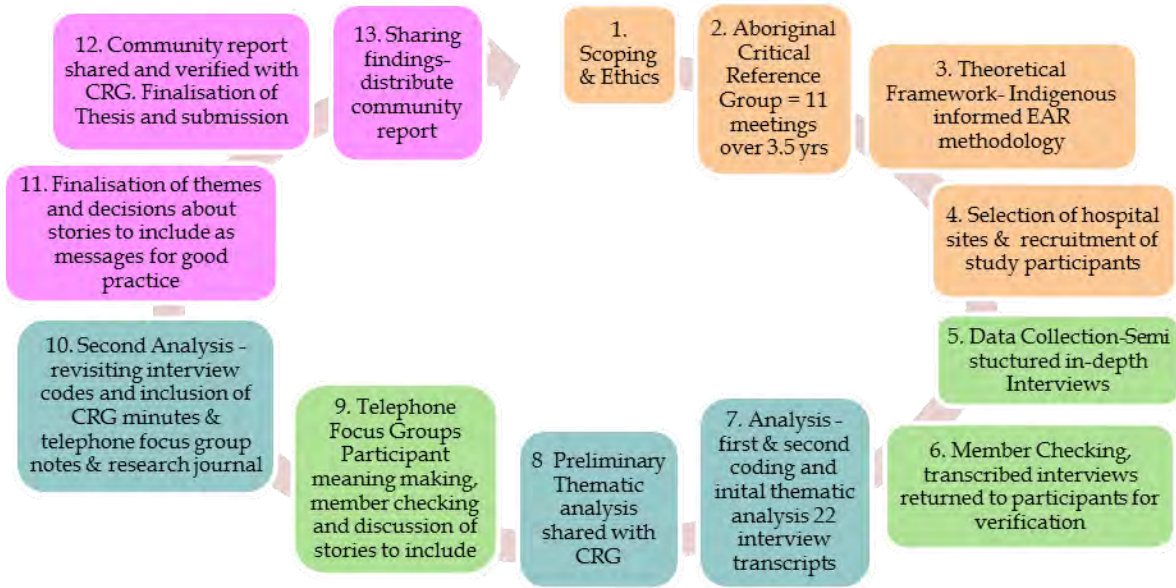
LEGEND: **PLAN** (1-4)   **COLLECT** (5, 6, 9)   **ANALYSE** (7, 8, 10)   **REFLECT** (11-13)

Elements in the research design

Different research methods can be used within the cycles of action research and decisions about the research modes used in this study (i.e. interviews, focus groups) were informed by the needs and constraints of participants, and the purpose and context of the study. The focus of the study, to understand the practice of Aboriginal and non-Aboriginal participants whose work straddles both the institutional setting of a hospital and the social and community context of Aboriginal patients' lives, led to the use of those specific methods. Writing a reflective journal and notes of the Aboriginal critical reference group meetings and focus groups were the main tools used to document the research processes and findings.

Some of the specific elements of the research design illustrated in Figure 2 that are unique to this study are now discussed to demonstrate how and why an action research approach enabled a deeper understanding of the complexity and value of the practice of Aboriginal Hospital Liaison Officers and Social Workers.

1. Scoping and ethics

The idea for the study came from my practice work as a senior social worker in a hospital with a majority of Aboriginal patients. That practice experience, coupled with a review of the literature, informed the questions pursued in the study. At the time of the scoping of this project, little research about Aboriginal and non-Aboriginal health care providers' relationships had been published in Australia. The literature about AHLOs and Social Workers recorded the fact that AHLOs had a reporting relationship to hospital social worker (Clarke, Austin, Andrews and Victorian Health Promotion Foundation, 1999; Guthrie, 2009; Posenelli, Clarke, Ewen and Waddell, 2009). There was little information about if, and how, AHLOs and social workers practiced together.

Consultative discussions with the main stakeholders, supervisors, and Aboriginal colleagues were held as part of the research scoping and before any data collection began. These confirmed the

decision to establish an ongoing Aboriginal CRG and processes of feedback and continuous dialogue with Aboriginal participants. The research was supported by a scholarship from the Lowitja Institute, creating an additional form of accountability, reciprocity, and adherence to Aboriginal research ethics and guidelines. Consultations held during the scoping stage of the study were:

- discussions with AHLOs and social worker informants from the Northern Territory, New South Wales, the Australian Capital Territory and Victoria during 2011 and 2012. These confirmed the decision to base the study in Victoria;

- participation at an Indigenous Health Workforce Roundtable (Brisbane, 2011) organised by the Lowitja Institute about scoping national research projects, and specific discussion of my study;

- visits and discussions with Aboriginal health organisations, the Department of Health, and Indigenous health researchers to confirm the relevance of the study to current policy and planning;

- engagement with AHLOs and social workers at ICAP forums in Victoria and invitations to participate in the scoping of the research;

- participation at a planning day in Alice Springs (August 2012) for a national *Flexible Pathways for Aboriginal Workers in the Health Workforce* study; and

- participation in, and presentation at, an Indigenous Health Research Summer School (Murrup Barak, University of Melbourne, February 2012).

Discussions at these forums affirmed the decision to situate the research in Victoria, to ensure a definable context for the study, and to build on existing knowledge. Attendance at the Indigenous Health Research Summer School was particularly influential and helpful in scoping and shaping the focus of the study from a strengths perspective. Discussion between students and presenters at the Summer School highlighted that the continual and

longstanding framing of Aboriginal health as a problem contributes to lowering expectations for improvements and feelings of hopelessness and disempowerment among Aboriginal people and communities. The continual focus on deficits deflects attention away from the resilience of Aboriginal culture and Aboriginal people. Documenting what is working to improve health and strengthen culture creates useful frameworks and identifies areas for research to counter-balance and challenge the dominant problem and deficit approaches.

Developing the methodology from a strengths perspective engaged AHLOs and social workers in a dialogue about their practice. A strengths framework in this study of practice is defined as an approach that looks to find out what is working – what is achieving successful patient health outcomes and what is culturally respectful (Saleeby, 1992; VicHealth, 2009).

Planning for participation in this research included ways to support both the AHLOs and the social workers who participated in the study. The intention of the study was to gain insight about what would support the practice of AHLOs and social workers with Aboriginal patients. That expectation included 'avoiding having an adverse impact on other's abilities to comply with their responsibilities' (NHMRC, 2003, p. 16). Consideration for participants' responsibilities and connectedness to communities and place was demonstrated with questions and respect for the advice of the Aboriginal CRG.

Informed consent was defined as an ongoing process with several points of checking.

2. Aboriginal Critical Reference Group: Cultural respect and researcher accountability

The development of a critical reference group (CRG) is a common action research strategy that ensures the continuing engagement of stakeholders and practitioners in the objectives, process, and sharing of the final research outcomes (Wadsworth, 1991). The importance of establishing the Aboriginal CRG early in this research was outlined in the ethics section.

Respectful and accountable research processes cannot guarantee good outcomes, but they do avert doing harm. Consideration of Aboriginal research principles and ethics sharpened both the critical cultural lens of this study and influenced my worldview and skills.

As already noted, two update reports about the study were shared (in poster format) at ICAP forums in 2012 and 2013. That presentations discussed the purpose of the study and how what was learnt could be used to inform current practice and training of AHLOs and social workers and further research ideas.

3. Theoretical framework—Indigenous informed EAR methodology

As described previously, Indigenous methodology literature (Chilisa, 2012; Martin, 2008; Smith, 1999; Wilson, 2003; Wilson 2007; Wilson 2008) and Intersectionality theory (Crenshaw, 1989; Collins 2000) informed the EAR methodology. The limitations of Eurocentric research and training were described earlier, but their value must also be acknowledged. Critical reflexivity was constantly used as a check upon the role of personal values and, as far as possible, to make my values transparent in the design, implementation and reporting of this research. My stated aspiration was to give voice to the practice of Aboriginal and non-Aboriginal participants in the study, and to value and implement the tenets of an Indigenist research paradigm outlined by Martin (2008) and Wilson (2007).

4. Selection of hospital sites and recruitment of study participants

Issues of timing, the specific or general health focus of hospital settings, other research in progress and geographic location were things taken into account when deciding on hospital sites and recruiting participants. The CRG at the May 2012 meeting agreed to the following criteria for selecting potential hospital sites and participants:

- the AHLO program is based in, or works in close collaboration, with the social work department

- it is preferred that there be at least two AHLOs and two Social Workers at the hospital site(s) as this reduces the chances of participants being identifiable and thereby will offer some confidentiality

- consideration will be given to including three urban hospitals and at least two regional hospital sites

- aim to recruit a `meaningful' sample size – somewhere between 20–25 participants

- offer focus groups as well as, or in addition to, individual interviews

- current and past AHLOs and Social Workers can be recruited because there is a high turnover of staff in some regions

Hospitals were invited to participate by the following criteria:

- internal hospital ethics approval

- geographic location to support a spread

- focus and range of services; previous or current research and other studies that may be complementary or lead to an overload

- the interest level expressed by AHLOs and Social Workers to be involved in this type of study

- the researcher's relationships and geographic proximity or the cost of access

- interest from the hospital management and other influential staff

Aiming to gain a sense of commonality and/or differences in practice, purposive sampling ensured the recruitment of AHLOs and social workers from across metropolitan, specialist and regional hospital sites. After I began recruiting participants in

October 2011, I was invited to discuss the research with executive research staff at four hospitals to ensure ethics compliance. Formal approval by the respective hospitals executives was granted for the research to proceed on all occasions. Following this approval, a research information flier along with instructions on how to contact the researcher, were sent to the hospital Senior Social Worker with a request to circulate to Social Worker and AHLO staff. In response to contact from interested participants, interview times were arranged at a time and place to suit them. A letter seeking permission to invite social work and AHLO staff to participate in the study was initially sent to the CEO of ten hospitals that met the selection criteria. This was followed up by a telephone call to ensure the letter was received.

Recruitment via the Improving Care of Aboriginal Patients network

A verbal presentation about the research to the ICAP network in February 2012 served to inform potential participants of the study before a formal approach to recruit them. This was also a way to demonstrate respect for the information sharing and coordination role of the VACCHO as the organiser of the network meetings.

The ICAP meetings are facilitated by VACCHO and are run over two or three days. The first day is always an AHLO-only forum, sometimes with guests. The second day is for both AHLO and Social Work managers. Attendance at several of these meetings was critical to building an understanding of the broader work context and environment of participants.

Later attendance at ICAP network meetings and delivery of research updates were an additional mechanism of accountability to the network, and every care was taken not to identify any of the participants of the study during the meetings or presentations.

Understanding the circumstances of participants is a key ethical consideration of all research. The growing recognition that there can be, and indeed are, qualitatively different ways of knowing (Martin, 2008) based on lived experience, identification of standpoint and belonging to the various groups (Chilisa 2012;

Denzin, Lincoln and Smith 2008) complements current discussion of intersectional approaches in health and human service. Use of open-ended questions and ethnographic practice narratives allowed both AHLOs and Social Workers to identify factors to be explored and spoken about.

Demonstrating respect for the information sharing and coordination role of VACCHO as the organiser of the ICAP network meetings and delivery of research updates was a critical follow through. Taking every care not to identify any of the participants of the study after fieldwork commenced, presentations about the progress of the study kept the study linked to practitioners and the Aboriginal health sector.

The exact number of AHLOs and Social Workers in hospitals in Victoria is not known because this is recorded individually by hospitals and is not required reporting. However, it was estimated by one of the key informants interviewed in the study that approximately 50 AHLOs and 200 Social Workers were employed in hospitals at the time of the study. As the study was exploratory and aimed to gather in-depth stories, a `small sample with maximum diversity across specific attributes' (Higginbotham, Johnson, and Briceño-León, 2001, p. 237) was selected.

Study participants

Twelve (12) Aboriginal and ten (10) non-Aboriginal people participated in the study. Nineteen participants were women and three men. Of the participants, there were ten staff from specialist hospitals and nine from regional area hospitals. Fifteen of these nineteen participants also had experience working in other Australian states. Ten participants had more than ten years, and nine had more than five years' health-related work experience. Further relevant information about the characteristics of the sample follows. The ten Social Workers included seven Senior Social Workers (managers/supervisors) and three social workers. Charged with managerial and supervision responsibilities of junior social work and sometimes non-social work staff, Senior Social Workers in hospitals require a minimum of three years' post-

degree experience and are considered to have a high level of clinical expertise in a relevant field of practice.

All of the three key informants were Aboriginal and had experience working in health policy. In addition to their perspective about the practice of AHLOs and Social Workers, they were invited to share their views and knowledge of the historical background to the AHLO positions, their understanding of Aboriginal health policy, and their experience of managing Aboriginal projects and programs based on mainstream services.

While the sample included a range of perspectives from male and female Aboriginal people, all of the non-Aboriginal sample were female Social Workers. The majority (16) of the sample were tertiary educated women over thirty; of these, seven were AHLOs.

5. Methods for gathering stories

Research methods in this study aimed to give voice to participants' perceptions of good practice. Stories have many layers of meaning, both for Aboriginal and non-Aboriginal people. Mechanisms of daily socialisation in most cultural groups use stories as both reflectors and makers of social values and commentaries about family, social relations, and society (Chilisa, 2012). Storytelling can include the use of metaphors, proverbs, poetry, theatre, and song; auto-ethnographic and community stories relay information about events and histories, and aspects of cultural identity (Fortune, Reid and Miller, 2013). The process of storytelling is associated with specific rituals, ceremony and knowledge transfer between groups and generations (Hart, 2008; Martin, 2008; Starks, Ofahengaue, Comer and Ortiz-Hendricks, 2010).

Introducing the range of social work approaches that can be grouped under the heading of storytelling including strengths–based perspectives and narrative therapy, Connolly and Harms (2013) note that stories are gathered and handed down through generations in families for many generations, and play a role in communities:

> In the same way as these life narratives create meaning for us, story-telling theories in social work focus on the stories we live by, as individuals, families and communities. This group of theoretical approaches proposes that stories of strength and resilience can influence how we think, feel and act. By listening to our own internalised stories and others that are shared with us, we can begin to understand both their meaning and the influence they have on the ways in which people live their lives. (p. 124)

Narratives can represent social and symbolic interactive acts. They take on meaning in a social-environmental context, but they also play a part in creating that context. Both social actors and discourses about them are implicated in the creation of social reality (Berger and Luckman, 1966).

Understanding the circumstances of participants is a key ethical consideration of all research. I sought to allow both AHLOs and social workers to identify factors for exploration and to speak about them with open-ended questions.

6. Member checking

Each individual's interview was transcribed and the transcript was returned to each participant for verification. This also provided an opportunity for participants to clarify, omit or change any of their ideas.

7. Analysis

The analysis involved two rounds of coding and thematic analysis of the 22 interview transcripts, 2 focus group notes, 11 CRG meeting notes, and my research journal. My documented reflections influenced the development of codes and categories (e.g. primarily derived from the interview transcripts), were recorded in a coding book and used in NVivo (QSR International, Melbourne). NVivo is a computer-assisted qualitative data analysis software program (Richards 2002), that was used in the analysis.

According to Coleman and Unrau (2005) creating guidelines and keeping notes about the coding process protect them from whims or impulsive decisions, assist the researcher to track the evolution

of data analysis, and ensure greater reliability of coding. I constructed and used a coding notebook and created a coding table in a similar manner.

Corbin and Strauss (2008) three levels of analysis: first coding, second coding and finalisation of themes was used. The first round of coding created units of meaning or codes in each transcript. Clustering the first set of coding of participant's transcripts into broader categories and including similarly coded data from the telephone focus groups informed a second and more detailed round of coding and finally the third level of analysis was the creation of themes. For example, give a general example of a codes/categories and themes and refer to the figure with themes.

The final analysis included reflecting on the other ideas in the literature, the CRG minutes, and my action research journal. Interview transcripts, read in detail after all participants had approved their own, were coded according to each occupational group. Patterns and exceptions were found, and then compared to find similarities, points of agreement, differences, and exceptions. Some codes were not exclusive to any one theme.

The definitions of categories and the assignment of meaning to the data in these categories and recorded in a coding book were referred to constantly during coding activities to maintain consistency.

8. Preliminary thematic analysis shared with CRG

Thematic analysis, as described by Liamputtong and Serry (2013), is 'the identification of themes through a careful reading, and rereading of the data' (p. 375). Connecting different codes and making connections between categories a good thematic code should enable a researcher to identify the indicators for its presence and absence and 'find themes in the data' (p. 376). The initial themes from an analysis of the in-depth interviews were discussed at a CRG meeting in June 2013 and notes from that meeting informed the final analysis. Themes were derived from the data in the study and crafted into a guide for principles of good practice.

9. Participant meaning-making and verification of preliminary themes via telephone focus groups

Member checks were a vital part of the research process. Participants in the study were involved in making sense if the data and confirming the themes I identified. This occurred through the return of transcripts and the telephone focus groups. In addition, the CRG and supervisors checked codes and themes. Chilisa (2012) suggests that member checks are the most important means of establishing the credibility of qualitative research. She explains:

> The researcher must verify with research participants the themes and patterns that are developing as a result of data collected and analysis used. Member checks can be formal and informal. For example, at the end of an interview, the researcher can summarize what has been said and ask if the notes accurately reflect the person's position. Drafts of the research reports can be shared with members for comments (Chilisa, 2012, pp. 166–167).

10. Second analysis

Corbin and Strauss's (2008) model of three levels of analysis is discussed under the titles of first coding, second coding and finalisation of themes. A second round of coding is a way of checking data already coded, to check if the codes are rigorous and appropriate and that the data has been fully explored. The second coding led to combining some individual codes and led into the finalisation of themes.

11. Finalisation of themes

The final themes and stories of good practice to be included in the thesis presentation were discussed with participants during the telephone focus groups, the Aboriginal CRG, and solidified through re-reading transcripts. The results were compared with elements in the theoretical scaffold devised in another chapter of the thesis. The process of writing up data analysis is itself a recognised method for making sense of data, and I found that looking back over the scaffold, and in particular the elements pictorially represented in Figure 2 was a useful reference point for

considering if the themes and codes were reflective of those present in the literature.

Lee and Zaharlick's (2013) proposition that ethnography is a meta-framework for conducting culturally competent research is also relevant. They describe the use of writing as a discovery process with the use of self as a research instrument. Reflecting on all the forms of data and my role as a researcher, a similar approach was utilized in the final analysis of the research data.

12. Community report

A community research story report summarising the study was written at the conclusion of the research. It will be sent to all participants, organisers of the ICAP network, members of the CRG, participating hospitals and other relevant stakeholders. This dissemination is a critical knowledge translation activity, which will occur after final examination of the thesis.

13. Sharing findings

Conference and workshop presentations, posters and publications were additional activities undertaken as a knowledge translation strategy during the life of the study.

Validity, rigour and credibility of the research methodology

Qualitative research studies are sometimes criticised as being subjective and therefore unreliable and even invalid. In response, strict criteria have been established to assess qualitative research. Chilisa (2012) identifies the main terms used to assess qualitative research studies, and the corresponding terms used for quantitative studies, as follows: 'credibility for internal validity, transferability for external validity, dependability for reliability and confirmability for objectivity' (p. 165). Chilisa (2012) asserts that sustained and prolonged engagement, peer debriefing, negative case analysis, progressive subjectivity, member checks, triangulation, referential adequacy, and reflexivity are valuable

additional criteria for assessing qualitative research validity and reliability.

Sustained and prolonged engagement, member checks, triangulation and reflexivity were the criteria for validity and reliability addressed in this qualitative EAR study. Engagement with research participants and the CRG occurred over four years, through presenting to the ICAP forum and Lowitja Institute and other Indigenous health conferences and workshops. Member checking was the main form of credibility confirmation, and occurred through the interviewer asking if the derived concepts and themes accurately reflected the participant's position. Returning full written transcripts with an invitation for participants to change, clarify or add further comments was another form of member checking. The sharing of the summary of themes with both the telephone focus group participants and the CRG were further ways of verifying the research themes. Supervisors also played a peer review role by reading through and discussing the themes and other findings. Triangulation of data was achieved through analysing in-depth interview transcripts, telephone focus group process notes, my research journal, CRG meeting minutes and analysis of relevant policy documents, reports and the literature. Data coding was checked by my primary supervisor as a form of peer validation and ongoing reflexivity, as documented through use of my research journal and notes at both CRG meetings and during supervision sessions, was practiced.

A measure of the robustness of the methodology of this study is how well it meets Wilson's (2008) principles of Indigenist research and Higginbotham *et al.*'s (2001) criteria. Higginbotham *et al.* (2001) recommend assessing the quality of research from

> the richness of the data and their ability to generate theory;
> their empirical groundedness in wider contexts of social life;
> their incorporation of multiple subjective understandings
> and the reflexivity of the researcher (p. 56).

The methodology of this study, which enabled the gathering and analysis of stories of practice, met both Wilson's (2007) Indigenist research principles and Higginbotham, *et al.*'s (2001) qualitative

research criteria. The interview questions elicited stories of real practice grounded in the everyday work and lives of participants, and this required reflexivity on the parts of both the participants and myself. Multiple and subjective perspectives from AHLOs, social workers, and key informants were included, and I practised continual reflexivity. The study did not specifically aim to generate theory but findings about the sociocultural health practice of AHLOs' and social workers' practice highlighted the interpersonal skills required to enact good practice and the significance of connectedness and relatedness as key concepts to further explore in Indigenous health practice.

Summary of practice principles

Focusing on the strengths reported in the practice of AHLOs and social workers, six principles for individual good practice in hospitals with Aboriginal patients, their families and their communities were defined in the study. They are summarised for this article as follows.

1. Foundational knowledge of the health impact of colonisation, the Stolen Generations and racism upon all Aboriginal people is essential for good practice.

2. Consultation with family, extended kinship groups and Aboriginal community organisations demonstrates respect for Aboriginal obligations and responsibilities to care for kin and country.

3. Respect for Aboriginal conceptions of health and wellbeing and individual patient beliefs and understandings about health can be incorporated into assessment, case management and discharge plans.

4. Relational ways of AHLOs and social workers working together improves communication and outcomes for Aboriginal patients. Offering both social work and Aboriginal perspectives and knowledge of health issues and systems assists patients to decide on their best or preferred treatment and service options.

5.   Engagement with Aboriginal organisations at celebrations and significant cultural and community events, by AHLOs, social workers and hospital management, contributes to building trust between hospitals and local Aboriginal communities and creates two-way learning pathways.

6.   Enabling further cultural and professional development for hospital social workers and professional development for AHLOs supports good practice. Shared training opportunities and involving Aboriginal elders in the support and supervision of AHLOs and social workers helps build strong and trusting links between AHLOs and social workers with local Aboriginal communities and contributes to creating cultural safety.

Conclusion and next steps

This article described the methodological theory, research design, and processes of analysis of the stories of practice shared in a PhD study about good practice. Principles for Indigenist research, ethical conduct in Aboriginal and Torres Strait Islander Health Research and criteria for robust qualitative research were outlined. Discussing the steps in the research design and implementation, it is argued that the action research methodology and design adequately met the outlined criteria.

The action research methodology of this study facilitated the gathering of stories of good practice that in turn enabled the identification of common elements of practice in the work domains of both Aboriginal Hospital Liaison Officer and Social Workers in hospitals in Victoria. Following examination of the research thesis, the next steps are to share those findings with participants, decision makers, and influencers and to advocate the further development and support of the identified elements of good practice.

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Biography

Elizabeth Orr leads the ANROWS Action Research Support project. With a substantial action research track record, Liz has a strong commitment to improving outcomes among women,

especially women affected by other forms of inequality and exclusion (e.g. racism, poverty). This is demonstrated by positions as the Evaluation Manager at the Secretariat National Aboriginal and Islander Child Care (SNAICC) and as a Senior Project officer with the Stronger Families Learning Exchange at the Australian Institute of Family Studies (AIFS). In both of these positions she collaboratively designed and facilitated action research training and worked alongside a broad range of community providers to implement action research evaluation. Liz also has significant experience as a service provider and researcher in the Violence Against Women sector, including contributing to the development of service models against sexual assault at West CASA and CASA House, leading a multi-cultural Family Violence Outreach Team at Women's Health West in Melbourne and contributing to the development of strategies to prevent and respond to violence against women and their children in the health, housing, and community service sectors.

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Enabling change: How one school implemented and adapted action learning as a form of teacher professional development for over a decade

Bronwyn Ruth Mehorter

Abstract

Western Public School (WPS) has a long and ongoing association with action learning. Over the past decade, WPS has adapted action learning from a small-scale, more traditional form of action learning to a whole school application of action learning to a form of action learning that is driven by the staff. Their adaption of action learning has led to changes occurring in teacher learning, classroom practice and student outcomes. According to Guskey (1991), professional development involves the complex process of change. Western Public School's history and adaption of action learning demonstrates that consideration needs to be given to factors that enable this process of change to occur.

Key words: Action learning, experimental learning, professional learning, professional development, primary education

Introduction

Action learning refers to a process in which a group of people come together more or less regularly to help each other to learn from experience' (Dick, 1997). Action learning originated with Reg Revans (1978, updated in 2012) who held fast to the principal that learning and action are interdependent on each other. As such, he said: 'there can be no action without learning and no learning without action' (Revans, 2012, p. 11). Revans' Action Learning was

originally developed to enable managers to tackle real-life problems to which a current solution ceased to exist. Revans (2012) wanted to enable managers to acquire a new view of learning: One which suggests that learning is not purely, or only, the acquisition of programmed knowledge, but it is this knowledge (P) combined with questioning insight (Q) which, Revans put forth would lead ultimately to learning (L). As such he stated that $L = P + Q$ (Revans, 2012).

In his book *The ABC of Action Learning,* Revans (2012) details the underlying assumptions and phases of an action learning project. Some of the underlying assumptions expressed in his book are that learning is cradled in the task, problems require more than formal instructions, Insightful Questions must also be asked, learning involves doing, and learning is a social exchange in which participants learn from and with each other (Revans, 2012). Revans (2012) describes the phases of a typical action learning project as being Diagnosis, Six Sequential Phases (Analysis, Development, Procurement, Construction or Assembly, Application and Review), Intermediate Invigoration and Therapeutic. In addition to this, Revans (2012) suggests that an action learning program be made up of about four to six members who work regularly on their action learning projects and that these members meet together in order to give an account of their progress and setbacks (Revans, 2012).

Brook, Pedler and Burgoyne (2012) highlight that within the last 15 years, action learning has flourished, and as such, variations on the original form are prolific. These authors discuss the impact these variations have had on Revans (2012) original form and they highlight that it is due to its flexible and adaptable nature, that AL has been able to diverge and develop (Brook, *et al.*, 2012). However, they also strongly state that, 'attention must be paid to its core essences whilst allowing for growth and experimentation' (Brook, *et al.*, 2012, p. 272). It in within this context that action learning has spread to the field of education.

The action learning projects referred to in this paper stem from Revans' (2012) original form.

Experiential learning

Experiential Learning underpins the learning component of action learning (Dick, 1997). Beard and Wilson (2006) describe experiential learning as a fundamental and natural process of learning; a process which they see as 'the sense-making process of active engagement between the inner world of the person and the outer world of the environment' (p. 19). Dick (1997) describes experiential learning as a process in which learning is drawn from experience, in that they learn from experience. Dick (1997) explains that during the experiential learning cycle, an ongoing series of cycles occurs between *action* and *reflection*, which leads to learning. So that, when a learner *reflects* on their *action*, it leads to a change in behaviour in future action, as such, learning has occurred (Dick, 1997). Experiential learning describes the learning that occurs as result of participation in action learning.

A review of action learning projects in Australian schools

Current literature shows the diverse ways in which action learning projects are being implemented into educational contexts and how it is a means of providing teachers with solutions to real-life problems within their classroom or school context.

Beveridge and McLeod (2009) report on the use of an action learning project within an Australian Primary School context. This project consisted of six voluntary teachers and aimed to deepen the school communities understanding of Australia's Indigenous culture and history. Evaluation of the project showed that both the teachers and students saw the learning that occurred as part of the project as significant, teachers' awareness of the importance of accurately portraying events of the past increased, and teachers' knowledge about Indigenous culture increased. This project resulted in development of closer ties between the school and Aboriginal community groups.

Similarly, Kilpatrick and Loughland (2012) report on an action learning project which also occurred in an Australian Primary School context. This project ran over a period of three school terms and involved two classroom teachers and an academic partner. The program focused on the use of Interactive White Boards (IWBs) to support literacy learning. As a result of this project, students came to expect the use of quality pedagogies throughout teaching areas, and new teacher understandings and pedagogies were constructed. In reflection on the action learning process, the authors stated, 'it is the relevance of the action learning process to our own practice, beliefs and reflections that ensures the longevity and value of our learning, findings and future directions' (Kilpatrick and Loughland, 2012, p. 44).

Herbert (2012) reports on an action learning project which involved twenty four teachers, from different schools and year levels, in WA. The project aimed to engage teachers with the Australian Curriculum (English and History) and with 'faction' – 'a literacy work which is a mix of both fiction and fact' (Braxton, 2010, p. 1 in Herbert, 2012, p. 87). The project occurred over twelve weeks, and consisted of four organised opportunities for professional discourse and collaboration. On evaluation of the project, it was found that teachers were provided with an opportunity to engage with the Australian Curriculum, teachers were introduced to action learning, teachers and writers were connected in professional discourse, teachers were able to share how student learning had improved, and that teachers were able to discuss and receive feedback from a variety of colleagues at different schools.

Interestingly to this paper, Beveridge (2010) reports on an action learning project called, "Thinking School Project". This project focused on increasing staff knowledge about the Quality Teaching Framework (QTF) and creating a shared understanding amongst the school teachers. It was made up of six voluntary teachers, and an academic partner and went for two years. It was found that teachers' knowledge of the QTF increased significantly, and they were able to use this knowledge in their programming and lesson

delivery. This project, however, did not continue in its existing form, as a there was concern, by teachers, about the dichotomy between the ALP team and the rest of the school staff. Therefore, the project was expanded the following year, with teachers being organized into three Action Learning Teams, working on issues relating to their school context.

Context – Western Public School

Western Public School is a P-6 (Preschool-Year 6), NSW government school located within a metropolitan area in NSW. The school's student body is comprised of 371 students, made up of up of 21% of Aboriginal, 32% of students who speak English as an Additional Language/Dialect (EAL/D), a two-unit preschool and 4 support classes for students with intellectual disabilities. The school has an Index of Community Socio-Educational Advantage (ICSEA) of 850, which, when compared to the national average of 1000, demonstrates the level of educational disadvantage that these students come to school with (ACARA, 2015). As a result of these complex issues facing the school on a daily basis, the school has made the professional learning of its teachers a high priority since 2004.

A Traditional Action Learning Project (2005)

In 2005, a more traditional, small-scale Action Learning Project (Traditional Action Learning Project - TALP) was implemented at Western Public School.

This TALP, known as the "The Engagement Project", aimed at increasing student engagement during the Literacy Block, with the hope that it would increase student literacy outcomes and their basic skills (Flick, 2011). The project involved four voluntary teachers and an academic partner (who was a leading literacy expert and who would continue on supporting the school in this role for over a decade), lasted for over two years, and received funding from the Australian Government's Quality Teaching Program (AGQTP) Quality Teaching Action Learning (QTAL) grant. This project resulted in increased teacher knowledge,

increased student outcomes, and the substantial promotion of teacher professional learning within the team members who participated (Flick, 2011).

Major concerns, however, emerged from this small-scale project. These concerns were the effective dissemination or 'spill over' of new learning to the whole staff, the sustainability of the project in light of staff leaving for positions within other schools, and perceptions of elitism toward the staff who were involved (Flick, 2011). These concerns were similar to those reported by Beveridge (2010). Flick (2011) describes how the concerns were seen as an impetus for the incoming executive staff to ask, 'Whether the Action Learning principles could be extended to a whole school level?' (p. 7). Therefore, the leadership and the academic partner at Western Public School set about exploring the feasibility of extending the TALP to a whole school level.

A Whole School Action Learning Project (WSALP) (2009-2010)

In 2009, action learning was adapted and extended to include the whole schools teaching, support and executive staff and the Whole School Action Learning Project (WSALP) was developed.

Whereas the TALP was aimed at increasing student engagement during the literacy block, the aim of the WSALP was to address how the literacy block could be restructured to increase student engagement and to 'create a school wide culture of effective and avid reading behaviour' (Flick, 2011, p. 8). As well as this, the WSALP also aimed to create a school-wide ethos of professional development. This project, which ran for over two years (from 2009-2010), extended the action learning process to the whole school's staff the teaching staff, support staff and executive staff.

Structure of the WSALP

The WSALP sought to create an infrastructure within the school, which would enable teachers to meet collaboratively, receive input, implement new learning into the classroom, reflect upon

this experience, and as such, engage in professional development (Flick, 2011). Therefore, the project was structured to include Input Days, Action Learning Teams, Action Learning Team Meetings, and the same Academic Partner who had worked with the school continually since 2005.

Input days

Input Days occurred twice a term, every term, for half a day. They provided an opportunity for each Action Learning Team to meet together, with the Academic Partner. Unlike Revans' (2012) original form, staff attendance at these days was mandatory; however, implementation of ideas into the classroom was on a voluntary basis. The aim of these days was to enable teachers to receive pedagogical and theoretical information, encourage teachers to trial, use and assess pedagogical practices in their classrooms, and promote personal, professional reflection by the whole staff (Flick, 2011).

The Input Days took a 'hands-on' approach, with workshops promoting "deep and substantive professional conversations" (Flick, 2011, p. 10). The Academic Partner set the agenda for the day. Teachers would then discuss and reflect upon their learning. The content of these Input Days was strongly linked to the Quality Teaching Framework (QTF), and to the English Syllabus (K-6). Staff were provided with resources, such as summaries and fact sheets about the QTF.

Action Learning Teams

Action Learning Teams were stage-based teams, consisting of a team leader and 3-4 teachers or support staff who represented a range of stages/years. The team leaders were responsible for facilitating the Action Learning Team Meetings (Flick, 2011).

Action Learning Team meetings

These meetings were held Tuesday afternoons after school. During the meetings, teachers discussed content from the Input Days and reflected on their 'homework tasks', which occurred between Input Days. These 'homework tasks' involved the staff implementing

new pedagogical strategies into their classrooms, as well as reflecting upon their success (Flick, 2011).

Academic Partner

The Academic Partner was mainly in control of identifying and providing a definition of possible school problems, which could be addressed by the action learning program. He states:

> I would invite the executive and team leaders to make explicit their worries, issues and problems, (which they did) and then they would wait for me to identify and give a name to their problems and issues, and then design some workshop, inquiry or task for them to apply to their groups (Academic Partner, personal communication, May 4, 2016).

Outcomes of the Whole School Action Learning Project

Strengths

The professional learning of the whole staff

One of the major successes of this action learning project was the professional learning that occurred across the whole staff. This teacher learning focused on Literacy Block, especially studying it in-depth and justifying practice (Flick, 2011) and is demonstrated in teacher comments with regards to their learning. One teacher commented:

> The biggest thing was the episodes and the way we looked at the Literacy Block as a series of episodes as opposed to having reading, writing, talking and listening and having to fit in modelled, guided and independent reading, modelled, guided and independent writing and modelled, guided and independent talking and listening, we looked at how that intertwined.
>
> (Melissa, in Flick, 2011, p. 133)

It was also reported in Flick that another member of the teaching staff restructured her Guided-Reading Session and teaching practices to teach without worksheets (Flick, 2011). It can also been seen, when one teacher comments on being asked to write her ideal literacy block, that this 'is still something I go back to now and just read' (Natalie, in Flick, 2011, p. 133).

The professional learning of the whole staff at WPS can also be seen in their comments about the prescribed text, 'The Book Whisperer' by Donalyn Miller. Flick (2011) reports that, upon reading this book, one teacher commented that she began to enjoy reading again and as such, she is able to think about student disengagement from their perspective. Yet another teacher told of how the content of the book made her challenge and change her thinking about reading (Flick, 2011). The professional learning occurring during the WSALP at WPS was one of the significant strengths of this Action Learning Program.

The process of action learning

Flick (2011) reports that the processes and structures of action learning were a success of the WSALP. One teacher commented on how beneficial the 'ongoing trial and error about what worked and what didn't work, and how it's affecting the children' (Melissa, in Flick, 2011, p. 113). Another teacher commented on the benefit of having time for professional collegial discussions, she said, 'To have three hours to just sit and talk and debate and reason with your colleagues is just so valuable' (Jessica, in Flick, 2011, p. 114). Action learning enabled teachers to receive quality input from the academic partner, engage in professional dialogue, promote positive change in the classroom, and gain support through discussion and feedback (Flick, 2011).

A new school culture

Flick (2011) reports that the implementation of the WSALP was vital in changing the WPS school culture. One teacher comments, 'It's not just classroom teachers, it's our support teachers, our visual arts teachers, it's ICT teachers, it's *everyone*' (Natalie, in Flick, 2011, p. 116). Flick (2011) describes how the ongoing nature of the WSALP Action Learning Program, and its inclusion of the whole staff, led to the staff being able to develop a shared vision and a common language, which was used daily. Furthermore, Flick (2011) reports that because of this whole school program, changes to and improvements in teacher quality were seen, which 'over time created a new school culture' (Flick, 2011, p. 116). This was supported by the strong expectations held by the Principal

and Deputy Principal that the school culture could change (Flick, 2011).

Collaboration between staff

Collaboration between the staff was seen as a significant success of the WSALP. Teachers at WPS agreed that time spent collaborating with colleagues was highly valuable (Flick, 2011). One staff member reported the value of being able to 'sit down with your colleagues and just talk and share things and get different ideas' (Natalie, in Flick, 2011, p. 120). Another teacher expressed how valuable it was to be able to talk professionally about practice with colleagues (Flick, 2011). Collaboration between staff was ongoing and aided by the development of a group email system. This email system was used to share journal articles, activities or notes which were new or relevant to the WSALP (Flick, 2011). The collaboration between staff during the WSALP lead to the creation of new teaching and learning activities, pedagogical experimentation and support through their learning journey (Flick, 2011) and was seen by all as a significant success of the WSALP.

Academic Partner

The ongoing partnership with the Academic Partner was also a significant success of the WSALP. Staff expressed how they valued having the Academic Partner assess their classes and to provide detailed and positive feedback (Flick, 2011). The teachers at WPS also reported on the success of the Input Days and how the content caused them to reflect on and change their teaching practices during their Literacy Blocks. One staff mentioned how lucky they felt in have such an opportunity, and another reported:

> …knowing that on those two days when (the Academic Partner) was here twice a term that everyone was getting the same input, everyone was getting the same language, everyone was discussing it and also that different things are coming of it and it created topics for discussion and opportunities for professional dialogue.
>
> (Jessica, in Flick, 2011, p. 119)

Weaknesses

Time demands

A weakness, identified from Flick's (2011) Responsive Evaluation, was the time demand the WSALP placed on teacher time. Several staff commented on the large amount of time that the Action Learning Program involved. One teacher commented:

> It is something else to do in a profession that has so many demands on your time and the time spent in the input session takes up so much teaching and learning time and you can throw your program out from time to time.
>
> (Catherine, in Flick, 2011, p. 127)

In particular, time off class and the effective use of time were mentioned as weaknesses of the WSALP.

Time off class

Teachers at WPS described the amount of time off class, as part of the WSALP, as having a negative effect on their teaching, programming, and, in particular, the behaviour of the students in their classes. One teacher commented that spending half a day off class for the Input Days was:

> …distracting for students (and) the fact that what our students need is consistency and because it's happening twice a term, and it's for a half day, it's disruptive to our class.
>
> (Jessica, in Flick, 2011, p. 127)

Time off class is significant to the context of Western Public School as student behaviour at this school at times can be challenging, requiring consistency in terms of teachers and structure (Flick, 2011). When teachers were asked to take half a day off class for the WSALP, their classes were interrupted which often resulted in disruptive student behaviour. Teachers mentioned the consistency of being interrupted during the Input Days and being asked, via intercom, to go back to class and attend to the behaviour of the students in their class. Another teacher mentioned that if she wasn't called away during the Input Days, she felt stressed, thinking:

> Such and Such is probably running around the school or
> doing whatever and then having to deal with all the
> consequences of that afterwards, it's not great.
>
> (Jessica, in Flick, 2011, p. 128)

Effective use of time

Teachers at WPS also indicated that the time of the WSALP could be more used more effectively. One teacher commented that instruction given during the Input Days involved 'chalk and talk' and other teaching strategies, which she wouldn't use in the classroom. She suggested the further use of collaborative discussions between staff, as a more effective use of time. This same teacher reported that the reading which occurred during Input Days was static time, in which she felt the pressure of reading which affected her comprehension of texts (Jessica, in Flick, 2011, p. 129). Finally, the repetitious nature of receiving content in the Input Days and then going over it again in the Action Learning Team Meetings was considered ineffective by some teachers, particularly those who had been on the earlier, Traditional Action Learning Project (Flick, 2011).

> The previous session was bringing our talking and listening
> outcomes and justifying them. And granted I kind of missed
> it but everyone else had done it. We went to our Stage
> meetings and did it again. So pretty much all we did was
> add a couple more, and I typed it up.
>
> (Catherine, in Flick, 2011, p. 130)

The change that occurred as a result of the WSALP

A significant degree of change was seen through this WSALP at WPS. Students were more engaged during the Literacy Block, as evidenced by the comments of teachers who described their students as being 'more attentive', 'begun to listen', and 'demonstrated an increased motivation to learn' (Flick, 2011, p. 160). The enjoyment of students during the Teacher Read Aloud Sessions significantly increased. Teachers reported that they were spoken to in the playground about the books being read to them in class, and that they were being asked by students to continue

listening to the book, even into their recess or lunch (Flick, 2011, p. 162).

Significant change in teacher learning also occurred as a result of the WSALP with teachers agreeing that they experienced unexpected degrees of significant learning, with one teacher describing the WSALP as being 'on a whole other level of amazing' (Jessica, in Flick, 2011, p. 163). Teachers at WPS found the WSALP to be "a source of both personal and professional empowerment and improvement (Flick, 2011, p. 163).

Since 2010, Western Public School has continued to adapt action learning on a school-wide basis.

A subtle shift in ownership and responsibility – A 12-week Whole School Action Learning Project focused on writing (2013)

In 2013, the focus of the Whole School Action Learning Project changed from a focus on reading to a focus on writing, with the hope of developing an avid writing culture across the school. This focus stemmed from a challenge issued by author, Mem Fox at a literacy conference, who argued that teachers of writing should themselves be actively engaged in writing. Fox's challenge, combined with observations from the staff at Western Public School, resulted in the executive staff requesting to the academic partner that the focus of the next action learning project be on the teachers developing their own piece of writing.

This request indicated a subtle shift in the ownership and responsibility of the school's professional learning. Whereas previously it had been the responsibility of the Academic Partner to decide on both the content and the form that the action learning projects would take, *now* the teachers at Western Public School were taking responsibility for both the focus of their professional learning and the form that it would take.

The staff at WPS decided on the timing of this 12-Week Whole School Action Learning Project and as such make a strong

commitment to completing this project in the twelve-week period of Term 4. During this period of time, the Academic Partner also noticed how the staff made decisions, such as working in groups, selecting their own groups, and the genre and topic that their piece of writing would take on.

A shift in the relationship with the Academic Partner

A subtle shift also occurred during this time in the relationship of the school with the Academic Partner. This shift aligned with the Constructivist beliefs of the Academic Partner who believed that the teachers would be more empowered in their learning if they had more control over making decisions about the content and nature of their professional learning (Academic Partner, personal communication, May 4, 2016). While the staff at WPS are responsible for the content and form of their professional learning, the Academic Partner role shifted to one in which he enabled them to stay true to the principles of action learning and to support and assist the staff in their professional learning.

A school-wide application of staff-led action learning projects (2016)

In 2016, the whole school's staff (teachers, support staff and executive staff) was given the opportunity to complete their own, teacher identified action learning project. Each staff member was provided with 4 x half day sessions in order to meet together within an across-stage Professional Learning Community's (PLC's), during which they would discuss their individual action learning project, reflect on their progress, ask questions, gain feedback and further develop their own action learning project. Each PLC was given autonomy in deciding the process they would undertake in order to complete their action learning projects. This process often included collaborative discussion, reflection, the giving and receiving of feedback, reading of literature, sharing of student work samples and documenting evidence of teacher and student learning.

The process of action learning that each teacher undertook in order to complete their project included five steps as identified by the Academic Partner. These include:

1. Identifying a broad professional issue or domain of professional concern

2. Planning the project

3. Implementing an action plan

4. Observing, reflecting, recording, discussing and reflecting upon the action

5. Evaluate and celebrate

(Academic Partner, 2016)

There was a range of topics that the 23 action learning projects focused on. These included Establishing a 21st Century Learning Environment, Enhancing Social and Emotional Awareness of Students, Improving Reading Strategies in Year 1, Using Data to Improve Teaching Practice and Reflective Writers.

Outcomes of the staff-led action learning projects

Outcomes from across the 23 projects included improved teacher professional learning, changes in classroom practice and improvement in student outcomes.

Table 1: Examples of outcomes from the staff-led action learning projects

Improved Teacher Professional Learning	Changes in Classroom Practice	Improvement in Student Outcomes
"I have learnt the importance of setting up a timeline with checkpoints along the way so that both the teacher and I can ensure we are on target to achieve the goal". *"I researched modelled reading strategies and effective ways to decode unfamiliar words and make meaning in texts".* *"I discovered that many of my students were only relying on visual information and initial sounds".* *"I looked into Marie Clay's work and decided to implement teacher prompting using the four types of information in print".* *What makes an expert learner? Western Public School Staff (Professional Development)*	*I have also introduced peer evaluations where students share their writing to a friend and they give feedback using the strategy 'two stars and a wish'.* *Students now participate in regular writing conferences with the teacher and their peers and use their individual writing folder to annotate samples, discuss them with the teacher/peers and set writing goals.* *Upon reading all the literature, I incorporated the four types of information in print into my daily modelled reading group time.* *The inclusion of collaborative skills (linked to the expert learner framework) in the daily success criteria, are a reminder of exactly what is required of the students. The learning spaces are much more user friendly in terms of collaboration.*	*During this semester, there was a 23% increase in the number of students in Cluster 6, a 19% increase in the students in Cluster 7 and a 17% decrease in the number of students in Cluster 4.* *Students are reflecting on their writing by checking their writing against the writing process chart and the success criteria.* *Students set individual writing goals based on areas they need to develop in writing, identified during writing conferences when discussing annotated samples.* *I have also found that students are now self-correcting and are able to decode words independently after implementing the four types of information in print.*

On reflecting on these outcomes, the Academic Partner (2017) concluded that these results suggest a three-stage process compromising of changes in teacher learning, changes in classroom practice and changes in student outcomes. Furthermore, he adds, it can be concluded that these changes can only occur given sufficient time (Academic Partner, personal communication, 2017).

The process of change - discussion

Western Public School has continuously adapted action learning as a form of teacher professional development for more than a decade. Their long history and association with action learning highlights the complexity of the process of change which professional development involves (Guskey, 1991). The change that is highlighted from the experience of Western Public School includes change in teacher learning, change in classroom practice and change in student outcomes. As the long standing Academic Partner points out, this type of change can only occur given sufficient time.

Current literature also points to the importance of time in enabling change to occur. Desimone (2009) described one of the core components of effective professional development as being 'sufficient duration'. This referring to both the time spent within a professional development program and the overall length of the program. With the principle being that the more time teachers spend in professional development, the more likely it is that their practice will improve. (Bayar, 2014; Darling-Hammond, Wei, Andree, Richardson and Orphanos, 2009; Desimone, 2009; Hunzicker, 2011; Qablan, Mansour, Alshamrani, Aldahmash and Sabbah, 2015; Quick, Holtzman and Chaney, 2009; Whitworth and Chiu, 2015).

Furthermore, well-known researcher Guskey (1991) describes several other factors, which enable the process of change to occur. These are (in brief):

- That change is an individual process

- Think big: start small

- Work in teams

- Include procedures for personal feedback on results

- Provide continued support and follow-up

<div align="right">(Guskey, 1991, pp. 240-245)</div>

In describing such factors, Guskey (1991) warns that the success of a professional development programs is not determined by addressing these factors but to ignore or neglect these factors is to:

> at best limit the success of professional development programs and, at worst, will result in programs that fail to being about significant or enduring change in any form (p. 240).

Conclusion

For other schools considering implementing action learning on either a small-scale or a large, whole school basis, the potential of these findings are significant. In that, if one considers the process of change that is embedded in teacher professional development and *enables* this change to occur by allowing sufficient time for this change to occur and by considering the factors described by Guskey's (1991) in his article '*Enhancing the effectiveness of professional development programs*'. Then, as Guskey (1991) argues, the success of the professional development program will not be guaranteed but it will not be limited.

For organizations who are currently implementing action learning as a form of work-based learning, or who are considering implementing action learning for this purpose, the potential of these findings are relevant. Action learning is a flexible and adaptive approach to learning that is based in the problems, challenges and opportunities that currently face organizations. Western Public School's long and ongoing association with action learning demonstrates the potential for other organizations to consider the feasibility of expanding and adapting action learning, while still staying true to its principles. As well as this,

organizations or businesses must consider the process of change, which is embedded in any form of professional development and how that process of change may be *enabled.*

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Biography

Bronwyn Mehorter is a PhD Candidate at the University of Wollongong. Her areas of interest are: professional development, primary education and quality teaching practices. Her PhD focus' on professional development within the primary education context.

Implementing organisational change using action research in two Australian organisations

Diane Robyn Kalendra and Andrew Cook

Abstract

This paper is based on two organisational change projects implemented by the authors in their respective organisations. Both projects used an action research intervention to bring about a market orientation in the organisations and also contributed to the authors' academic researches. One project was carried out in a small intermediary in the general insurance industry. The other was set in a large national government business enterprise. The paper first introduces the concepts of market orientation, organisational culture and action research in management research. It then describes the two research projects. Finally, it concludes with the researchers' reflections on their research highlighting their setbacks and successes, thus contributing to the practice of organisational change using action research.

Key words: Market orientation, action research, organisational culture, small business, government business enterprise

In order to develop a competitive advantage, an organisation must focus on a particular strategic orientation, such as: a *product orientation*, with a focus on product quality; a *production orientation*, with a focus on reducing expenses and improving efficiency; a *product orientation*, with a focus on developing the 'best' products; a *selling orientation*, with a focus on the needs of the seller rather than the buyer; a *marketing orientation*, with a focus on the needs of the buyer rather than the seller and being more effective than

competitors in delivering superior value to them through the activities of the marketing department; or a holistic *market orientation*, with a focus on an organisation-wide approach to customers rather than one centred on the marketing department (Kotler and Keller, 2016). Market orientation is the most widespread orientation in modern business (Sittimalakorn and Hart, 2004) because it is an important determinant of business performance (Carpenter, 2017; Frösén, Luoma, Jaakkola, Tikkanen and Aspara, 2016).

Since the seminal works of Kohli and Jaworski (1990) and Narver and Slater (1990) many empirical studies have explored market orientation and its positive impact on business performance (Cano, Camillat and Jaramillo, 2004; Deshpande and Farley 1998, 2004; Ellis 2006; Homberg and Pflesser 2000; Narver and Slater 2000). However, much less research has explored how to implement a market orientation in an organisation (Gebhardt, Carpenter and Sherry, 2006; Carpenter, 2017; Jaworski and Kohli, 2017). This paper reflects on two organisational change projects implemented by the authors that used action research interventions to bring about a market orientation in their respective organisations in Australia: one a small intermediary in the general insurance industry; the other a large national government business enterprise. The paper first introduces the concepts of market orientation, organisational culture and action research. It then describes the two projects, before concluding with a discussion of the setbacks and successes experienced in the two research projects.

Market orientation

Market orientation is a broader concept than marketing orientation, for it ceases to be a function and becomes an organisation's way of doing business (Esteban, Millan and Martin-Consuegra, 2002). The development of a market orientation is a long-term process and represents an investment in the future of the organisation.

The market orientation approach emphasises the use of market intelligence in steering marketing processes, and promoting this orientation throughout the organisation (Renko, Carsrud, Brannback and Jalkaren, 2005). The focus of market intelligence extends beyond intelligence about specific customers to include intelligence on the entire market, including competitors. Gathering this intelligence, then disseminating and responding to it, is the responsibility of the organisation as a whole, and not just that of the marketing department (Jaworski and Kohli, 2017; Kohli and Jaworski, 1990; Shapiro, 1988). This approach will result in a greater acceptance of the business strategy across the organisation compared with the marketing department-centric approach of marketing orientation (Lafferty and Hult, 2001).

However, to generate, disseminate and respond to market intelligence, a market orientation is dependent on: top management support for a market orientation (Jaworski and Kohli, 1993); measurement and reward systems that recognise and reward employees for tracking and responding to market needs (Jaworski and Kohli, 1993); the degree of formalisation, centralisation and departmentalism required for these activities (Jaworski and Kohli, 1993; Kohli and Jaworski, 1990); and, the nature of interdepartmental dynamics (Gerbhardt *et al.*, 2006; Jaworski and Kohli, 1993; Kohli and Jaworski, 1990). In addition, a market orientation is more likely to flourish in an environment where continuous learning and improvement (Gerbhardt *et al.*, 2006; Slater and Narver, 1995) and innovation (Jaworski and Kohli, 1993; Kohli and Jaworski, 1990) are encouraged.

While external environmental conditions such as market turbulence (Jaworski and Kohli, 1993), competitive intensity (Jaworski and Kohli, 1993; Kohli and Jaworski, 1990) and technological turbulence (Kohli, 2017) impact on a market orientation, a significant aspect of a market orientation comprises changing the internal *organisational culture* to develop shared values in relation to customer service and quality (Gebhardt *et al.*, 2006).

Organisational culture

Schein (2010) describes organisational culture on three levels: *artefacts*, including the structure of the organisation, stories, rituals, and organisational processes, such as the flow of information; *values and norms*, which are the expectations about behaviour shared by the group; and, the organisation's *beliefs and assumptions*. Deeply held, these beliefs and assumptions shape the norms and values, and ultimately behaviour in an organisation (Desphande and Webster, 1989; Gebhardt *et al.*, 2006; Narver and Slater, 1990).

Organisational cultures can be differentiated based on members' responses to questions such as: what can be talked about or not talked about; how does one get ahead or stay out of trouble; what are the unwritten rules of the game; what are the organisation's morality and ethics; and what stories are told about the organisation? (Kilmann and Saxton, 2011).

Certain shared organisation-wide values are more likely to support a market orientation than others (Homburg and Pflesser, 2000). For example, open internal communications are more market orientated because market information is shared across the organisation (Wei and Morgan 2004).

Based on the work of Quinn (1988) and Cameron and Freeman (1991), Deshpande, Farley and Webster (1993) linked four organisational culture types - clan, hierarchy, adhocracy and market - to a market orientation. These links have since been further investigated by researchers. A clan culture, focusing on loyalty, tradition, and interpersonal cohesiveness (Deshpande *et al.*, 1993) that could result in a lack of attention to changing market needs, is unlikely to encourage market orientation (Appiah-Adu and Blankson, 1998). Similarly, a hierarchy culture, focusing on rules, stability, predictability and smooth operation (Deshpande *et al.*, 1993) may result in an inward bureaucratic organisation which is unlikely to be market oriented (Appiah-Adu and Blankson 1998).

Conversely, an adhocracy culture, focusing on entrepreneurship, creativity and risk taking (Deshpande *et al.*, 1993), facilitates the

creation of market-driving strategies (Carrillat, Jaramillo and Locander, 2004) that are likely to support a market orientation. Similarly, a market culture, focusing on productivity, competitiveness, goal achievement and market superiority (Cameron and Freeman, 1991; Deshpande *et al.*, 1993) and placing importance on customer issues, which may lead to sustainable customer value (Appiah-Adu and Blankson, 1998), is likely to support a market orientation. Because it also facilitates a successful communication of innovation, a market culture is the best culture type to implement market-driving strategies (Carrillat *et al.*, 2004).

However, changing organisational culture towards a market orientation requires a suitable strategic change management process.

Action research

As the name implies, action research involves both a practical and a theoretical approach (Sankaran, Dick, Passfield and Swepson, 2001), and is equally concerned with solving real-world problems as well as creating new knowledge (Elden and Chisholm, 1993). It tends to be qualitative rather than quantitative in terms of outcomes (Dick, 2000). There is no strict definition of action research; however, it has a number of commonly agreed characteristics (Abraham, 2012). Importantly, it is collaborative and involves a group of key stakeholders making sense of an issue, defining the research, collecting and interpreting data, and attempting and adjusting solutions (Marsick and Gephart, 2003). Also importantly, it is emancipatory and group members are empowered to initiate change during all phases of the action research process (Dick, 2000). It is obvious that action research is not a simple or quick process. It should be used when an organisation or individual wants to achieve understanding and change simultaneously. It is an iterative and cyclical process involving planning, acting, observing and reflecting (Figure 1).

Fig. 1: The spiral of action research cycles
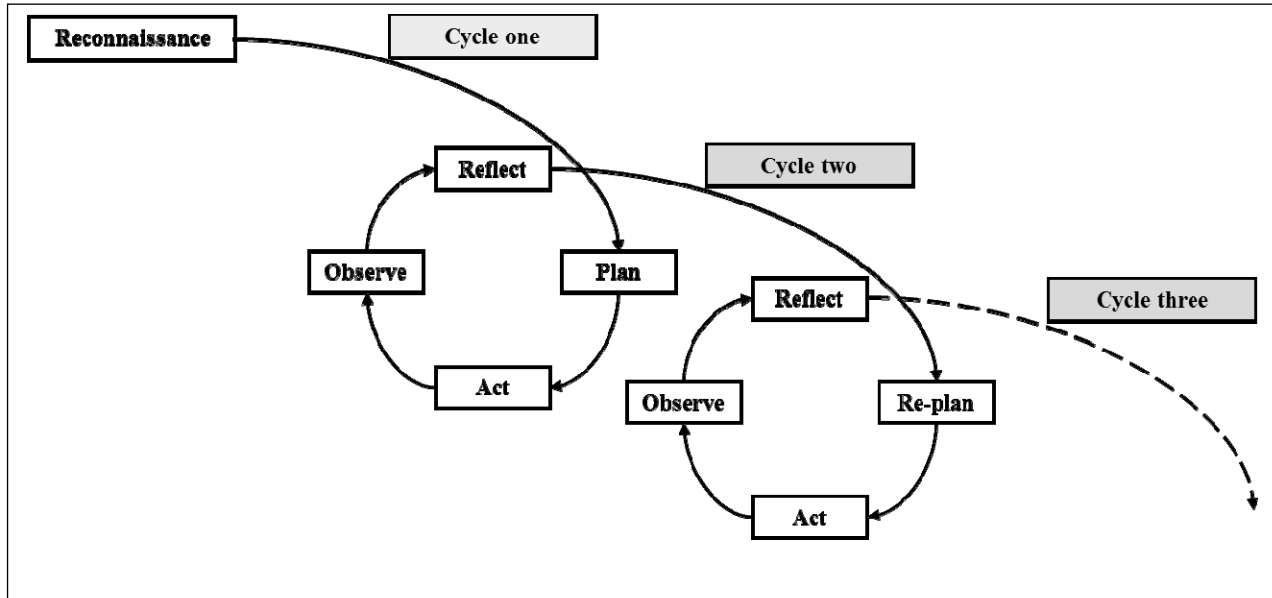
Source: Adapted from Zuber-Skerritt (2001)

First organisational change project

The first research project investigated whether an action research program could help a small intermediary in the Australian general insurance industry to adapt its market orientation and thereby improve its business performance.

General insurance sector

Among the financial services industries in Australia, general insurance ranks in the top 10 in the world, with premium income in excess of AUD $25 billion (KPMG, 2011) and assets of over $118 billion (APRA, 2012). Insurance policies are sold to customers through two main distribution channels: the direct channel, by the insurer through their branch networks, call centres and the internet; and the indirect channel, through intermediaries (between the direct insurers and customers), which currently dominate the commercial insurance market segment. Direct insurers in Australia include large, well-known brands such as AAMI, NRMA, GIO and Suncorp. Their lower pricing, higher advertising spend and use of the internet make them dominant in the personal insurance market. Once direct insurers have reached saturation point in the personal insurance market, however, they will need to seek a larger share of the commercial insurance market in order to continue growing. This growing threat to indirect insurers is similar to patterns in the United Kingdom (Datamonitor, 2007) and the United States (Dumm and Hoyt, 2002). In addition, the Australian general insurance industry is a mature market that is highly competitive, with direct insurers and intermediaries both seeking the same business with little product innovation or new markets (KPMG, 2009). As a result of this competition and a lack of community understanding of general insurance products, many consumer decisions are price based, favouring the lower pricing model of the direct distribution segment (Steers, 2008). The market share of the Australian insurance industry by distribution channel is shown in Table 1.

Table 1: Australian general insurance industry — market share by major product

Distribution channel	Personal insurance (for example, home and car insurance)	Commercial insurance (for businesses)
Direct	67%	6%
Intermediary	33%	94%

Source: Adapted from JP Morgan (2009)

Therefore, the second, indirect channel of intermediaries must differentiate its offerings in a meaningful manner for competitive advantage (Steers, 2008). These intermediaries include insurance brokers, insurance agents and alliance partners such as credit unions, who sell insurance policies to customers on behalf of insurers. They dominate the commercial insurance segment through higher quality service and personalised customer relationships (JP Morgan, 2009).

Research site

The site for the first action research project was XYZ Insurance Brokers, a small insurance intermediary that operates with eight staff members from a single location in Adelaide, South Australia, and manages the needs of over 4,000 clients. Most of the clients are families who purchase car and home insurance. These personal types of insurance have become more price sensitive in recent years and many small intermediaries have struggled to compete on the basis of price. As a result, the growth and profits of the business have stagnated.

The business was established over 35 years ago and was owned until 2008 by a member-based organisation that focused on providing discounted products and services to its members. The new owners recognised the need to reduce clients and staff's focus on price and increase their focus on the benefits of the products and services supplied by the business.

XYZ met all the criteria for a research site (Marshall and Rossman, 2016):

- entry was possible as the researcher was a Director of the organisation and the Board of Directors had given approval for the project;

- the site had a rich mix of processes, involving a wide variety of tasks that were not repetitive or simple;

- the majority of employees were willing to participate in the project;

- the researcher had an understanding of the site and an excellent working experience within the organisation (he had been involved in the general insurance industry for over 25 years and had over 15 years management experience); and

- the data was available in an original and natural form.

Further, sampling was not considered to be an issue as the study involved a single organisation.

Study rationale

A literature review of 41 studies found a positive link between market orientation and improved business performance in key areas such as profitability, return on equity and sales growth (see, for example, Akimova, 2000; Anttila, 2002; Castro, Armaro and del Rio, 2005; Lafferty and Hult, 2001; Sin, Tse, Yau, Lee and Chou, 2004). However, there had been little research into how managers can improve their organisations' market orientation (van Raaij and Stoelhorst, 2008). Moreover, there was little evidence regarding the impact of market orientation on smaller organisations, and almost none in relation to small intermediaries in the general insurance industry. This study aimed to fill this gap. The organisation thus decided to change its strategic business focus from a sales-based orientation to a market orientation in order to improve client retention and profitability. Management recognised the

importance of the employees understanding and driving the change process.

Action research was considered an appropriate methodology for this study because it can help organisations to develop their capacity to learn how to change practices, processes and cultures for the successful implementation of change programs (Marsick and Gephart, 2003).

Research methodology

The study involved two action research cycles based on meetings. Between meetings, individual participants worked on market-oriented sub-projects they had agreed to take responsibility for. The action research group consisted of a facilitator (the researcher) and five employees of the organisation. It was sponsored by the Chief Executive Officer (CEO). All the study participants worked in customer service roles, assisting clients with the placement of insurance and, to a lesser extent, on claims and credit control issues, mainly over the telephone and via email.

The group met on a monthly basis to plan, act, observe and reflect on the introduction of a market orientation to the organisation. An important aspect of the group's function was the selection of sub-projects to improve the market orientation of the organisation (Table 2). Each sub-project was undertaken by one of the group members, who was responsible for introducing the outcomes of their sub-project throughout the organisation. The individual participants worked on their own sub-project outside the action research group meetings in the work-based phases of the project.

Table 2: Participants' sub-projects and their outcomes

No.	Sub-project	Outcomes
1	Monitoring market trends	Improved knowledge of market and ability to identify opportunities and threats.

No.	Sub-project	Outcomes
2	Reviewing competitor wordings and products	Improved ability to overcome price-based objections by focusing on features and benefits of products.
3	Seeking feedback from customers at lapse/cancellation stage	Not continued because few customers lapsed.
4	Monitoring competitor specialties	Ability to refer hard-to-place insurance risks to suitable alternative insurance providers.
5	Seeking feedback from customers at quotation stage	Ability to monitor market segments where the organisation is strong or has weaknesses. Able to seek alternative insurance providers to assist in problem areas and target segments where the organisation has success.
6	Seeking feedback from clients who submit claims	Ability to highlight positive and negative claims experiences. Can be used to give feedback to insurance providers and seek improvement.
7	Seeking feedback from customers at the new business stage	Highlights why people chose to deal with the organisation. Reinforces positive behaviour.

Source: Cook (2013)

Data collection

The study involved data collection from participant observation and self-reports of participants. In order to develop further

understanding of the current orientation of XYZ Insurance Brokers, all relevant staff completed a survey based upon the MARKOR scale (Kohli, Jaworski and Kumar, 1993). It was important to keep the data analysis simple and transparent to those involved, especially considering the participants' lack of research knowledge. Accordingly, the data analysis involved triangulation of data, which was valuable in seeking a reflection of reality in the data rather than trusting a single source of information to provide a comprehensive perspective (Patton, 2015), from:

- participants' self-reports;

- project sponsor's observations;

- MARKOR survey results (comparison of results collected before the project commenced and after it finished); and

- the researcher's observations.

Data analysis

To help measure market orientation, Jaworski and Kohli's (1993) MARKOR scale was used. This is a 20-question survey using a 5-point Likert scale. It provides measures of three components of market orientation, namely, the ability of the organisation to gather, disseminate and respond to intelligence. While the scale has been criticised in terms of its factor structure, it is accepted that the items in the scale do measure activities associated with market orientation (Gauzente, 1999; Pulendran, Speed and Widing, 2000). The MARKOR scale is also supported by its wide use in measuring market orientation in diverse regions and cultures including South America (Rojas-Mendez, Kara and Spillan, 2006), Europe (Pitt, Caruana and Berthon, 1996), Asia (Kaynak and Kara, 2004) and North America (Jaworski and Kohli, 1993).

At the start of the project, all participants completed a survey based on the MARKOR scale. The scores indicated that XYZ had a low level of market orientation. This assessment aligned with those of the researcher, the sponsor and the organisation's Board of Directors that the organisation leaned towards a sales orientation

than a market orientation, and was more focused on the selling skills and capabilities of the organisation than on the needs of the purchaser (Kotler and Keller, 2016). The score in each of the three dimensions of market orientation increased from a low of less than 3 at the start of the project, to a score greater than 3. This indicates that the market orientation of the organisation improved during the action research program. This is supported by the comments of the participants' self-reports at the end of the program. For example:

> My involvement in the project opened my eyes to ways in which we can meet the needs of our clients by focusing on issues other than price. (Participant A)

> When clients ring up to complain about price we are now talking to them about our product differences and we can undertake product comparisons that help clients make "apples for apples" decisions. (Participant C)

Results

The organisation continues to show a market orientation. It now regularly collects information on customers and competitors. This information is then shared systematically throughout the organisation and is used to make both daily operational decisions and inform strategic decisions. Given the relatively short-term nature of the project, it was not possible to measure the program's impact on client retention and profitability. However, there are some encouraging trends. Over the course of the project, the average premium charged per client increased by 27% while client retention decreased by only 3%. As a result, the profitability to the organisation of each retained client has increased. It could be argued that this result is not solely due to the more market-oriented approach. However, anecdotal evidence supports an increased ability of the organisation to overcome price-based objections in order to retain at-risk clients.

Reflection

The initial problems that arose with participants struggling to progress their sub-projects and participate in the action research

group meetings related to a number of participants lacking the confidence to participate in the project. However, these issues were overcome through mentoring by the researcher and support from the other participants. Nevertheless, it took a number of meetings before these participants gained confidence in their ability to be involved in the project.

The initial action research major cycle took longer than the planned three months because some participants left the organisation and meetings were delayed or involved fewer than four participants, and this tended to stifle the observation and reflection discussions. Indeed, the first cycle took seven months. This meant that some sub-projects did not progress in the first major cycle. But the second cycle was completed in nine weeks because there were few interruptions and the participants had more experience with the process.

A Director not associated with the study conducted exit interviews for departing employees, and the exiting employees discussed the project in positive terms. In addition, during the study the participants had the opportunity to discuss any concerns relating to the study with a Director not associated with the study during formal appraisals or informally at any other time. There was no negative feedback from the employees of the organisation in relation to the project and it is not believed that the project was associated with the employees leaving the organisation.

This research developed a model for introducing a more market-oriented approach into a small intermediary in the Australian general insurance industry using action research. This research has implications for other intermediaries in Australia and overseas financial services industries as well as managers of larger organisations who want to change their organisation's market orientation. However, these managers might use a slightly different program.

Second organisational change project

The second research project investigated whether an action research program could help a large government business enterprise to change its organisational culture towards a market orientation.

Government business enterprise

Government business enterprises (GBEs) are government-owned or government-controlled entities that produce goods and services on a commercial basis. Corporatisation of GBEs has been embraced by governments wanting to transform mostly state-owned monopolies into more commercial organisations while retaining them in public ownership. However, this move has not always improved their performance.

Research site

A regional operating division of a national GBE was the setting for this study. The division employed around 3,500 staff and contributed about AU $280 million of the GBE's national revenue. The reginal operating division itself was split into two major sub-divisions — Commercial and Operational. The researcher was the Marketing Manager of the Commercial Division. The study participants were all senior managers from both divisions, as well as from other support functions such as information technology and property management, operating within the region but reporting nationally. The study was sponsored by the Commercial Division Manager of the regional operating division, who was the researcher's manager.

Study rationale

In the five years before the study, the GBE had invested $510 million in automation to reconfigure its network. The investment had resulted in the GBE being able to handle increased throughput while simultaneously increasing service reliability and accuracy and lowering internal processing costs. However, top management

realised that while on-going cost saving initiatives would continue to be important, an increased focus on revenue growth through developing the organisation's culture towards a market orientation would also be needed at a time when the GBE's traditional market was eroding as increasing numbers of customers started using alternative technologies to fulfil their needs.

A review of the literature suggested that certain organisational cultures are more conducive to supporting a market orientation than others. While several types of culture can coexist in an organisation, one usually dominates (Deshpande *et al.*, 1993). Furthermore, of Quinn's (1988) organisational types a market culture is associated with the best performance (Deshpande *et al.*, 1993).

The institution where the researcher was undertaking doctoral studies at the time expected her to complete an action research thesis. This was serendipitous, for the researcher realised that action research was also the best approach for changing her organisation's culture towards market orientation.

The action research method has two aims: an action aim to bring about changes in some community, organisation, program or intervention (Carson, Gilmore, Gronhaug and Perry, 2001; McKay and Marshall, 2001); and a research aim to increase knowledge and understanding on the part of the researcher, the client or both, or some wider community (Dick, 2000). Thus, action research best suited the researcher's work-related concerns as well as her academic concerns. Action research had been used as a methodology to effect changes in a wide range of industrial and community development settings (Sankaran *et al.*, 2001). Furthermore, it had been used to effect a change of market orientation in a business (Ballantyne, 2003; Karvinen, 2002). However, a review of the literature found it had not been used to effect a change of market orientation of a GBE in Australia. This study aimed to fill this gap.

Action research was considered to be appropriate for this study as the research site met all the action research characteristics described by Abraham (2012), Table 3.

Table 3: Characteristics of action research met by this study

No.	Action research characteristic	Characteristics of this research
1	Problem focus	The action research method used in this study was problem focused in the context of a real life situation in an operating division of a government business enterprise
2	Action orientation	This study recorded all the evidence of action taken by the action research teams and the researcher
3	Cyclical process: spiral of steps	The action research method involved three cycles of pre-planning, planning and implementing with learning spiralling from one cycle to the next
4	Collaboration	The action research teams and researcher worked together to address the thematic concern of the organisation
5	Ethical practice	Ethical concern was always maintained through the process
6	Group facilitation	The action research teams operated as effective groups whilst applying this strategy implementation model to their respective departments and the organisation

No.	Action research characteristic	Characteristics of this research
7	Creative thinking	The action research teams and researcher used creative thinking in looking at different options and seeking the opinions of others
8	Learning and re-education	There was a change in the knowledge base of the researcher and the action research teams as evidenced in the database
9	Naturalistic	The study was undertaken in the natural setting of the organisation
10	Emancipatory	The introduction of the action research approach helped the organisation to implement strategy and improve the knowledge of customers and gave a purpose to all involved
11	Normative	The social 'norms' of the action research teams were considered during the research
12	Scientific	The data gathering and analysis processes used scientific techniques of participant observation, semi-structured interviews, clustering, logical chain of evidence, questionnaire feedback from participants and triangulation to ensure that the data was reliable and valid

Source: Developed for this research based on Abraham (2012)

Research methodology

Three action research cycles were completed during the research. These involved the sponsor, the researcher and 40 other

participants (some in multiple roles) in a steering committee (eight of the participants), three customer segment action teams (25 of the participants) and seven key project teams (35 of the participants) within the organisation.

The three action research cycles were enacted over four years covering two projects: the 'thesis action research project', for the development of the doctoral thesis; and the 'core action research project', for the development and implementation of a customer segment action plan for the regional operating division of the GBE. As described by Perry (2012), this approach contributed the findings from the core action research project to the generalising thesis action research project. Thus, the customer segment action plan was used to achieve a market orientation.

In the development phase of the plan, it was agreed that participants would develop a list of potential sub-projects that would increase the market orientation of the organisation. The group also agreed upon the process to be followed during the development phase and the number of group meetings to be held and their proposed timing. Following on from the first group meeting, participants developed and submitted a list of potential sub-projects as agreed.

The implementation phase of the plan involved seven key project action teams developing and implementing seven sub-projects selected from the list of potential sub-projects:

- Lead generation

- Leadership development

- Revenue protection

- Inventory management and goods supply chain review

- Product A review

- Product B review

- Market segment gap analysis

Data collection

Data collection for the thesis action research project included all data collected in the core action research project to form a chain of evidence, as well as data collected specifically for the thesis action research project to corroborate data and help develop convergent lines of inquiry (Yin. 2014), such as data listed in Table 4.

Table 4: Data collection

Thesis action research project	
Core action research project:	**Plus:**
- an action research journal kept throughout the action research process - contents of meetings and conversations - the researcher's reflections - agreements with the sponsor - the National Customer Segment Plans - minutes of meetings - the workbooks for the Customer Segment Action Planning Workshop - the Customer Segment Action Plan - the reviewed Customer Segment Action Plan - the key project action team briefs - the key project action team presentations - text of semi-structured interviews - two participant questionnaires	- business performance reports - customer satisfaction surveys - staff attitude surveys

Source: Developed for this research

Data analysis

First, after each plan, act, observe and reflect step of the core action research project a one-page summary of field notes was made. In addition, notes were made from data gathered in the thesis action research project. Next, twelve descriptive codes were developed from the research questions and attached to the data. Then, two interpretive codes were developed that linked together segments of the data within each of these research questions. Coding was summarised manually. Data tables were then used to display the reduce data to help identify and interpret it. Narrative texts and quotes were used to support these displays. Finally, triangulation was used to confirm or disconfirm data as a foundation from which to draw conclusions.

Results

An initial investigation of the organisation's cultural dimensions identified a weak market orientation associated with a hierarchy culture. There was little evidence of market intelligence generation, dissemination or responsiveness. Furthermore, the organisation's monopoly position was under increasing threat from two sources: deregulation, although this threat was not assessed as immediate; and, alternative technologies that were eroding the organisation's principal and protected source of revenue. This second threat was immediate and required the organisation to find new sources of revenue in competitive markets.

However, while the market orientation strengthened initially in response to the core action research project, with evidence of participants gaining for example, *a greater understanding of the business as a whole and how it works together*' to serve customers; there was evidence that the organisation's long-term response was to reinforce the existing culture rather than to make changes to the culture to support a market orientation. Specifically, there was an increased focus from top management on cost savings that was distracting some participants from engaging in revenue-generating activities. As observed by one participant, 'While I understand the need to manage costs … we can't go out and "drive revenues"

because we spend all day explaining every cent we're spending'. Furthermore, there was concern this focus on cost savings existed only because it was a proven and easy way to achieve the short-term profitability objectives demanded by key performance indicators set nationally.

As a result, while top management was focused on achieving short-term profitability, predominantly through cost savings, customer satisfaction and employee morale became issues for managers. For example, external market research indicated eroding customer satisfaction scores in consumer, small and large business segments. In addition, customer complaints increased. Furthermore, absenteeism increased to record high levels and staff attitude survey scores declined. As suggested by one participant, the increased focus on cost savings by reducing labour ratios was the issue, 'Cutting staff … it's got to be having an impact on staff morale … and, ultimately on absenteeism'.

In addition, the increased staff dissatisfaction was making it increasingly difficult to get middle management roles filled. As suggested by one participant:

> We can't get people to fill … manager roles because they know they're on a hiding to nowhere. They're being asked to achieve revenue targets at the same time as cutting staff. They're working additional unpaid hours just to get essential tasks done. They'll do this for a short period of time, but their good grace will run out.

Furthermore, there was evidence of a decreased focus on innovation because management feared uncertainty of the outcome and potential associated costs. As observed by one participant, 'We used to be considered the "Innovation State" … there doesn't seem to be as much innovation happening anymore'. In addition, there was evidence some participants were concerned decisions were being made without the involvement of the management team, for example, as stated by one participant:

> I don't feel there's a management team here. We get together once a month, we report on activities … but we don't discuss important issues.

However, openly questioning higher authority was not regarded as acceptable behaviour. While many of the participants were aware of the long-term consequences of achieving short-term profitability through a focus on cost savings, when questions were raised, they were dismissed often with references to the need to continue to cut costs as revenues were eroding. It was a vicious circle. Despite their concerns, participants were following orders, driven from above through key performance indicators directed at achieving short-term profitability.

Results from the first participant questionnaire, corroborated the findings that market orientation was weak prior to the implementation of the action research cycles. A re-examination of the organisational culture as evidenced above and corroborated by responses to the second participant survey indicated that while the market orientation strengthened initially in response to the core action research project, the organisation's long term response was to re-inforce the existing culture.

Reflection

The action research methodology was originally adopted by the sponsor of the study to differentiate himself from his immediate predecessor. However, the sponsor also demonstrated doubts about the methodology. Specifically, he was concerned that it was '*too academic*'. In addition, while the sponsor stated that he wanted to focus on better understanding customers, eliminating cross-functional barriers and developing leaders, the evidence suggests he was more focused on driving cost savings than on generating revenue growth to increase contribution by developing and implementing a market orientation. For example, during the pre-planning cycle the cost of taking large numbers of managers out of the workplace for a planning conference was of concern to him.

Furthermore, the sponsor placed a time limitation of seven months in which to conduct the core action project. By the careful preparation and planning of the action research project, this time limitation on data collection was minimised. However, while action research is an effective methodology for managing

organisational change, it is also time-consuming. Therefore, ongoing top management buy-in is crucially needed for it to succeed. If management views action research as 'too academic' then, in spite of initial enthusiasm, they may end up resenting the time taken to participate – especially, if it is a quick fix that they are really after.

The study contributed to management outcomes (as expected by the organisation), research outcomes (as expected by the university) and personal outcomes. Table 5 presents a matrix that summarises three different types of effects - direct, indirect and surprises that were not anticipated - with respect to each of the outcomes.

Table 5: Research outcomes

Outcomes	Direct	Indirect	Surprise
Management	A diagnostic tool for developing and implementing a market orientation.	Increased awareness of cultural issues in an existing organisation.	Sponsor's initial enthusiasm for the research waned.
Research	Action research is a useful research methodology for introducing organisational change.	Forecast outcomes of a market orientation.	Despite the length of the study, which lasted over four years, the participants remained relatively stable with only four leaving and five joining.

Outcomes	Direct	Indirect	Surprise
Personal	Successful completion of the researcher's PhD.	Transition from practitioner to academic.	The researcher became a reflective practitioner.

Source: Kalendra (2016)

Management implications

These two Australian studies show that action research is a useful methodology for implementing a market orientation, irrespective of the size of the organisation, as the first study site was a small operation comprising eight staff in total while the second site was a huge regional division of a national GBE with around 3,500 staff. They also show action research is a useful methodology for developing a market orientation, irrespective of the initial orientation or culture of the organisation, which in the first study site was a sales orientation and in the second site was a hierarchy culture.

However, both projects also experienced some setbacks. In the first project, the small staff numbers and the corresponding small number of research participants meant that any staff movement could have a major impact on the research process and outcomes.

The second project had the opposite problem of being set in a huge bureaucracy with large numbers of staff and changing organisational structure and policies. While in the first project quick action could be taken to compensate for the participant resignations and mentoring of could be given to compensate for their lack of confidence to participate in the research project, in the second project such compensations were to a certain extent out of the researcher's control. For example, the doubts the sponsor demonstrated about the action research methodology, as well as his focus on driving cost savings rather than on generating revenue growth to increase contribution through implementing a market orientation.

Another setback the second project faced was in the data collection process, for only a seven-month period was authorised in which to conduct the core action research project, which is quite a limited period considering the scale of operations. However, this limitation was minimised by the careful preparation and planning of the action research project.

Both developing a market orientation culture and the action research methodology are long-term, time-consuming processes. Thus, while action research is an effective methodology for managing organisational change, it is crucial to have ongoing top management buy-in for it to succeed. Often, management tends to view action research as 'too academic' and, in spite of initial enthusiasm, end up resenting the time taken by participants for the exercise when what they are really after is a quick fix. In fact, the literature shows that there have been cases where the 'research' component of action research has been deliberately camouflaged and the 'action' component emphasised in order to secure sponsor support (Sankaran, 1997). This is still considered ethical practice, so long as the research aspect continues in parallel with the action aspects, as the former is more of an academic requirement than an organisational one.

Despite these setbacks, both projects were successful in achieving both management and research outcomes. The first study developed a model for introducing a more market-oriented approach into a small intermediary in the Australian general insurance industry using action research. The second study resulted in a diagnostic tool for developing and implementing a market orientation culture in a large organisation such as a government business enterprise.

From a research point of view, both studies showed that action research was a useful methodology for managing change. Both projects also resulted in some personal outcomes for the researchers. The first study resulted in a Master's thesis, while the second culminated in a doctoral thesis and helped the researcher to successfully transition from a management practitioner to an academic.

However, further research could confirm elements found in these studies from the perspective of other organisations in Australia. In addition, further research could expand the focus beyond an organisation and explore the perspective of the customer and other actors in the buying decision making process (Carpenter 2017). Thus, acknowledging organisations operate in larger social systems.

Acknowledgement

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Biography

Dr Diane Kalendra (PhD, BMS - Waikato) is a Lecturer in Marketing, Strategic Management and Entrepreneurship at the Australian Institute of Business (AIB). With over 25 years professional experience in large national and international organisations, including a government business enterprise, as well as SMEs and not-for-profits, Diane's continuing research interests include marketing, strategic management, organisational culture, leadership development, and action research.

Andrew Cook (MMgt) is an experienced insurance manager with a demonstrated history of working in the insurance industry. Andrew is skilled in financial risk, risk management, property and casualty insurance, strategic planning and commercial insurance. He is a strong sales professional with a Masters of Management focused on adopting a market oriented approach using action research from the Australian Institute of Business (AIB).

10th Action Learning and Action Research and 14th Participative Action Research World Congress – keynote speakers

ALARA is proud to announce the Keynote Speakers at the ALARA 2018 World Congress at Norwich University, in Northfield, Vermont, USA on 17 – 20 June 2018.

The Action Learning and Action Research Legacy for Transforming Social Change:

Individuals, Professionals, and Communities' Developments, Organizational Advancements and Global Initiatives

The keynote speakers for each of these five streams are as follows.

Action Learning, Action Research Experiences of Individuals: Dr Hilary Bradbury

Dr Bradbury is a scholar-practitioner whose work focuses on the human and organizational dimensions of creating collaborative learning communities. Her Ph.D. from the Management School at Boston College is in Organizational Studies, with a focus on change and transformation. Dr Bradbury started her academic career at Case Western Reserve University in 1998 and became Professor of Management in Oregon's Health Sciences University (OHSU) in 2012. She now convenes the global network of action researchers, which seeks to transform conventional notions of knowledge production. Called AR+, actionresearchplus.com, their mission is "accomplishing more good together." Recent books include *Cooking with Action Research: Stories and Resources for Self and Community Transformation*, written with her associates in AR+, and, with Bill Torbert, *Eros/Power: Love in the Spirit of Inquiry: Transforming how Women and Men Relate*. She was named 2018 Jubilee Professor at Chalmers Institute of Technology Sweden.

Action Learning, Action Research Experiences of Professionals: Prof Jack Whitehead

Professor Whitehead is a Living Educational Theorist based in the UK. Previously at the University of Bath, he is now a Visiting Professor at the University of Cumbria, UK and Ningxia Teachers University in Ningxia, China. . He originated the idea that individuals could create their own explanations of their educational influences in their own learning, in the learning of others and in the learning of the social formations in which their inquiries are located, as their living-educational-theories. He pioneered the use of digital, multi-media narratives for clarifying and evolving the meanings of the expression of embodied values in explanations of educational influence, in research degrees. The resources on his website http://www.actionresearch.net are an international resource for action researchers who are generating

their own living-theories with values that carry hope for the flourishing of humanity. These theories are generated from inquiries of the kind, "How do I improve what I am doing? In which 'I' exists as a living contradiction."

Action Learning, Action Research for Communities' Developments: Dr Mary Brydon-Miller

Dr Brydon-Miller holds a Ph.D. degree in Environmental Psychology with a minor in Statistics from the University of Massachusetts. Dr Brydon-Miller is a Professor in the Department of Educational Leadership, Evaluation, and Organizational Development in the College of Education and Human Development at the University of Louisville. She is a participatory action researcher who conducts work in both school and community settings. Her most recent research focuses on research ethics in educational and community settings and on the transformation of institutions of higher education through action research. She is the editor, with David Coghlan, of the SAGE Encyclopedia of Action Research. She is completing work on a book on ethical challenges in the context of participatory research with her colleague Sarah Banks from Durham University. Her next major project focuses on working with middle-school students from around the world to engage as citizen scientists to better understand the impacts of global climate change.

Action Learning, Action Research for Organizational Advancements: Dr Ernie Stringer

Dr Stringer has spent the last 50 years as a teacher, practitioner, professor, and action researcher. He has an extensive background in education. Dr Stringer has authored numerous influential texts on Action Research, including *Action Research in Education* (2008), *Action Research in Health* (with Genat, 2003), *Action Research in Human Services* (with Dwyer, 2004), and *Integrating Teaching, Learning, and Action Research* (with Christensen and Baldwin, 2009). At Curtin University's Centre for Aboriginal Studies, he engaged in action research projects and consultancies in schools, Aboriginal communities, government departments, non-government organizations and business corporations. In 1988, he assisted in the development of an Australian National Aboriginal Education Policy. He was contracted by UNICEF to direct a highly successful community engagement project for the East Timor Department of Education, Culture, Youth, and Sports. Through visiting appointments at universities in Illinois, New Mexico, Texas and New York, he has maintained continuing connection with an international network of scholars in education, anthropology, and sociology. He is a past President of the ALARA, and for most of the past decade, he was an Associate Editor of the Action Research journal, while engaging in action research activities with local Aboriginal people in the Ngaanyatjarra school system in Western Australia.

Action Learning, Action Research for Global Initiatives: Her Excellency (H. E.) Professor Hassana Alidou, Ambassador of the Republic of Niger to the United States.

Dr Alidou holds a Master and a Ph.D. degree in socio-linguistics from the University of Illinois. Dr Alidou has taught at Texas A&M University prior to teaching as a full professor of Education and Cross-cultural Studies at the Graduate School of Education at Alliant International University located in San Diego, California. She has worked extensively in well over 30 countries in Africa with

the language of instruction policies in order to provide technical guidance to national governments and international organizations (i.e., UNESCO, World Bank, ACALAN, and ADEA). Dr Alidou has written extensively on Gender in International Development, the promotion of African languages in education, particularly in francophone countries. She has collaborated extensively with other specialists in the field of socio-linguistic and she is one of the leading thinkers in promoting bilingual education in Africa. While she has provided extensive knowledge in language planning and policies and multicultural education, she also has contributed by providing teacher training, textbook production and the development of literate environments in multilingual settings. She has edited mother tongue textbooks used in Niger and Burkina Faso. Dr Alidou is the co-author of the editorial guidebook (2015) *Action Research to Improve Youth and Adult Literacy in Multilingual Contexts: Empowering Learners in a Multilingual World*. (Hamburg: UNESCO Institute for Lifelong Learning).

The websites listed below include a call for proposals (and a video about that call), and information about Northfield USA and Norwich University.

In addition to the five keynote speakers, about fifty highly interactive presentations are expected over the three days of the World Congress. Registrations are now open.

More information on the ALARA website –

www.alarassociation.org

or World Congress website –

http://online.norwich.edu/alara

Action Learning and Action Research Journal – future directions
Colin Bradley

Frequent readers of the *Action Learning and Action Research Journal* may have noticed some adjustments to the Journal in this issue. These adjustments reflect ALARA's commitment to improve the academic quality of the *ALARj*.

ALARA Inc. (and its predecessor) has been publishing the *ALARj* since 1996. The action learning and action research community recognises the *ALARj* as an important source of the latest writings across the broad spectrum of methodologies related to action learning and action research that ALARA embraces. A quick review of articles over the last few years indicates the diversity of these writings.

- Academic cabaret, as described by Hill (2015)

- Adult learning, such as Elsey and Omarova (2017) or Smith (2017)

- Agile project management, in which O'Sheedy (2014) highlighted the relevance of action learning

- Cybernetics, such as Yu (2016)

- Gaming simulation, as described by Toyoda (2016)

- Human resource processes and metrics, such as Khalema, Zulla, Shankar, Chui and Ortiz (2016) and Mukherjee (2017)

- Indigenous peoples, and health care, such as Bronwyn Fredericks, Clapham, Bessarab, Dudgeon, Bainbridge, Ball, Thompson (Longbottom), Andersen, Adams, Collard,

> Duthie and Daniel (2015), Orr (this issue), and Wright and O'Connell (2015)

- Organisational change, such as Holyoake (2017) and Kalendra and Cook (this issue)

- Problem gambling, as discussed by Boucher and Fallon (2014)

- Social entrepreneurship, such as Bousnina and Chtioui (2016)

- Socio-economic environments, such as Verhage and Jacobs (2016)

- Sustainability, covered by Avriel-Avni (2017)

- Teaching, such as Avriel-Avni (2015), Cameron (2015), Hui and Salleh (2015), Peng (2015) and Mehorter (this issue).

This list is only a selection from the articles in the last six issues.

The Editors of the Journal over its many years have been increasing the quality of the articles published in the *ALARj*. The articles reviewed over the last twelve months provide an indication of this gradual increase in quality: sixteen submitted, five rejected, three requested to undertake substantial rewrites, and eight printed, all with amendments recommended during the review process.

While the diversity and quality of published articles has improved over the years, the ALARA Management Committee recognises that it has not been dedicating the necessary resources to improve the recognition of the *ALARj*. To rectify this shortcoming, the Management Committee has commenced several actions. These actions include confirming and recognising the many people who support the *ALARj*'s production in the Editorial Advisory Board (listed on pages 3-4), and seeking more members to this Advisory Board: see page 50. The Management Committee is also seeking to appoint an Editor-in-Chief and identify special issue Editors or guest Editors to help produce future issues of the *ALARj*.

The Management Committee will soon approach several senior action learning / action research specialists to identify members of a Global Strategic Editorial Board. Members of that Board will have several duties, including liaising with other Editorial Boards to advise the Management Committee on how to improve the quantity and quality of publications in action learning and action research, and the interaction and collaboration between Editorial Boards and groups. The overall aim will be to increase the number of high quality journals in the action learning / action research community.

Despite its years of publishing, ALARA has never registered the *ALARj* on an academic journals' index. The Management Committee plans to rectify this oversight during 2018. In subsequent years, as the *ALARj* develops, the Management Committee will seek to ascend to the highest levels in these indices.

Almost all people involved in the production of the *ALARj* are volunteers, but ALARA still has several costs for ALARj's production. ALARA receives a small amount from Informit, where the *ALARj* is in its database, and from Sydney University Press, where people can obtain a print-on-demand copy, but this income is less than a quarter of the cost of production. The Management Committee has resisted calls to charge a fee from authors for lodging their articles, but it will seek the views of the new Global Strategic Editorial Board in 2018 on this matter.

ALARA also produces other publications, such as World Congress Proceedings and Monographs. It will continue to produce these publications as the World Congresses occur, or as it receives submissions of potential Monographs. ALARA is always looking for new submissions and proposals for its publications, and interested parties should contact ALARA via its Secretary – secretary@alarassociation.org or Editor via editor@alarassociation.org.

The Management Committee is also investigating other means to publicise the activities of Action Learning and Action Research

Practitioners. The number of submissions rejected for publication in the *ALARj* indicates that publishable material exists, and that there are practitioners wishing to publish their work. While the medium may not be the *ALARj* or other high-level academic journals, that material still exists, and there is likely to be an audience interested in the material. ALARA is exploring ways to support those practitioners.

The year ahead, therefore, should be a very interesting one for readers (and authors) of action learning and action research reports, papers, case studies and other materials. The ALARA Management Committee hopes you not only enjoy the presented material, but also join us in developing and presenting that material.

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ALARA membership information and article submissions

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ALARA individual membership

Members of the Action Learning, Action Research Association Inc (ALARA) obtain access to all issues of the *Action Learning and Action Research Journal* (*ALARj*) twelve months before it becomes available to the public.

ALARA members receive regular emailed Action Learning and Action Research updates and access to web-based networks, discounts on conference/seminar registrations, and an on-line membership directory. The directory has details of members with information about interests as well as the ability to contact them.

ALARA organisational membership

ALARA is keen to make connections between people and activities in all strands, streams and variants associated with our paradigm. Areas include Action Learning, Action Research, process management, collaborative inquiry facilitation, systems thinking, Indigenous research and organisational learning and development. ALARA may appeal to people working at all levels in any kind of organisational, community, workplace or other practice setting.

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Journal submissions criteria and review process

The *ALARj* contains substantial articles, project reports, information about activities, creative works from the Action Learning and Action Research field, reflections on seminars and conferences, short articles related to the theory and practice of Action Learning, Action Research and process management, and reviews of recent publications. *ALARj* also advertises practitioners' services for a fee.

The *ALARj* aims to be of the highest standard of writing from the field in order to extend the boundaries of theorisation of the practice, as well as the boundaries of its application.

ALARA aims *ALARj* to be accessible for readers and contributors while not compromising the need for sophistication that complex situations require. We encourage experienced practitioners and scholars to contribute, while being willing to publish new practitioners as a way of developing the field, and introduce novice practitioners presenting creative and insightful work

We will only receive articles that have been proof read, comply with the submission guidelines as identified on *ALARj*'s website, and that meet the criteria that the reviewers use. We are unlikely to publish an article that describes a project simply because its methodology is drawn from our field.

ALARA intends *AlARj* to provide high quality works for practitioners and funding bodies to use in the commissioning of works, and the progression of and inclusion of action research and action learning concepts and practices in policy and operations.

ALARj has a substantial international panel of experienced Action Learning and Action Research scholars and practitioners who offer double blind and transparent reviews at the request of the author.

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Guidelines

ALARj is devoted to the communication of the theory and practice of Action Learning, Action Research and related methodologies generally. As with all ALARA activities, all streams of work across all disciplines are welcome. These areas include Action Learning, Action Research, Participatory Action Research, systems thinking, inquiry process-facilitation, process management, and all the associated post-modern epistemologies and methods such as rural self-appraisal, auto-ethnography, appreciative inquiry, most significant change, open space technology, etc.

In reviewing submitted papers, our reviewers use the following criteria, which are important for authors to consider:

Criterion 1: How well are the paper and its focus both aimed at and/or grounded in the world of practice?

Criterion 2: How well are the paper and/or its subject explicitly and actively participative: research with, for and by people rather than on people?

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Criterion 4: How well does the paper address questions that are of significance to the flourishing of human community and the more-than-human world as related to the foreseeable future?

Criterion 5: How well does the paper consider the ethics of research practice for this and multiple generations?

Criterion 6: How well does the paper and/or its subject aim to leave some lasting capacity amongst those involved, encompassing first, second and third person perspectives?

Criterion 7: How well do the paper and its subject offer critical insights into and critical reflections on the research and inquiry process?

Criteria 8: How well does the paper openly acknowledge there are culturally distinctive approaches to Action Research and Action Learning and seek to make explicit their own assumptions about non-Western/ Indigenous and Western approaches to Action Research and Action Learning

Criteria 9: How well does the paper engage the context of research with systemic thinking and practices

Criterion 10: How well do the paper and/or its subject progress AR and AL in the field (research, community, business, education or otherwise)?

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ALARj submissions must be original and unpublished work suitable for an international audience and not under review by any other publisher or journal. No payment is associated with submissions. Copyright of published works remains with the author(s) shared with ALARA Inc.

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AUSTRALIA

By FAX
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By Email
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ALARA'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.