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

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

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Editorial

Welcome to the thirteenth issue of the ALAR Journal. This is a bumper "Brisbane Conference 2001" edition and by far the biggest journal we have ever produced. It begins with a pictorial travelogue, by Yoland Wadsworth, who takes us through key ALAR sites and introduces us to leading action researchers in the USA, UK and Europe. Following Yoland's introduction, we present five wonderfully diverse papers developed from workshops given at the conference by Sue Gold; Janet Rice; Geof Hill; Nadarajah Srikandarajah and Lone Lisborg; and, Amy Azhar M H, Perry C, McCosker C F, and Norsyema Hani M N. The Brisbane Conference was a collaborative effort between ALARPM, Southern Cross Institute of Action Research, Australian Facilitators' Network and International Association of Public Participation. You can find more information about these organisations in "Networking".

In "People" we introduce two more ALARPM management committee participants, Shankar Sankaran, Southern Cross University, NSW, and Susan Weil, SOLAR Centre, UK.

In "Noticeboard" you will find the first announcement for ALARPM 6th and PAR 10th World Congresses, to be held in South Africa, at the University of Pretoria, from 22nd – 24th September 2003. Also in "Noticeboard", is a call for papers from Sage Publication's new Action Research journal, and more information on John Benjamin's Concepts and Transformation journal.

Finally, in "Bookshelf" we present a review by Chad Perry of Shankar Sankaran, Bob Dick, Ron Passfield and Pam Swepson's new book, *Effective change management using action learning and action research*.

Happy reading!

Lyn Cundy, Editor

We are one (paradigmatic river) and we are many (tributary streams)

Yoland Wadsworth –

Yoland Wadsworth is the new President of the Action Learning, Action Research & Process Management Association (ALARPM). Here she speaks about some of the things she sees as currently important to the future of the international field of action research and its numerous variants. She also takes us on a brief trip around some key sites of activity in the USA, UK and Europe and some of her reflections on that experience.

From margins to mainstream

Have you come across that marvellous cartoon that shows a cross-section of a building, with each separately-housed person having a thought bubble that reads: 'if only I wasn't so alone'? Most of us using this form of inquiry seem to have had – or continue to still feel – a sense of being a bit isolated, 'on our own' and 'against the mainstream', even as we carve out a way of inquiring that seems to us to be very effective in addressing many of the drawbacks of conventional ways of researching and learning. Sometimes we may find we are literally the only one in our area that is 'doing it' – or trying to. Sometimes we find a small number of others nearby who share our enthusiasm. Yet over about the last ten years it's begun to dawn on us that there are innumerable other streams of people doing things in very similar ways, and using approaches we might be inclined to call action research. They might be using other terminology altogether, but we sense our underlying ideas seem very much the same.

As we come to know more of what others do, we have those terrific moments of recognition – 'oh' we exclaim 'that's what we're doing', 'we use such and such term for what you're using', and so on.[1] Not only are we realising that we are 'not alone', increasingly we are realising that 'we are everywhere'! Compared to thirty years – or even 10 years – ago, there is an explosion of activity: numbers of people, projects, books, journals,[2] practitioners, centres, institutes, courses and higher degrees and now action research workplace jobs. In business and management schools right now, the value of AR/PAR in complex whole systems has been particularly recognised and it is making an especially 'hot' contribution. We may be close to critical mass for becoming quite mainstream – especially as elements of our approach are to be found increasingly within mainstream social research work and social science teaching.[3]

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[1] An early attempt to compare and contrast different streams was Daniel Selener's interesting and detailed analysis of four major traditions:

- participatory research in community development,
- action research in organisations,
- action research in education, and
- farmer participatory research.

(Participatory Action Research and Social Change, 3rd edn., Cornell University & Global Action Publications, 1998)

[2] Again, as I write, Peter Reason and Hilary Bradbury, on the heels of producing their milestone Handbook of Action Research (Sage, 2001), have just announced that they will edit for Sage a sophisticated and major International Journal of Action Research – Participative Inquiry and Practice. This will be a 'broad church' journal to complement the existing more specialised journals (e.g. Educational Action Research [EAR], Concepts and Transformations, Systemic Practice and Action Research (SPAR) and Action Research International [ARI]). The field will now include both online and hard copy, and most allow for open and collective peer review, consistent with our praxis.

[3] I daily see around me evidence that mainstream research and evaluation are taking on more and more participatory and action research characteristics that we have long proposed as essential. For example, the use of more two-way and group methods (even the ubiquitous 'focus group') and face-to-face engagement (even the often-flawed 'consultation'); the use of multiple methods, increasingly less often for triangulation to achieve a single 'real truth' and increasingly more

Secondly of course our terminology and activities are *not* exactly identical (recognisably similar, yes) – but different *enough* to yield a mother lode of rich creativity as we contribute to each other's ideas, movement and creativity. We spark each other – mostly quite unwittingly – to see things slightly differently, in a fresh light, to put ideas together differently, as we tell our story into someone else's differing context but nevertheless to someone who shares the same epistemological values (e.g. iteratively and co-constructed knowledge for expressed/negotiated purposes, naturalistic/real world 'laboratory' or sites, real-time and whole systems scope, etc. etc.).

In 1997 in Cartagena, Orlando Fals Borda and his co-workers saw this emerging trend and selected the timely theme of 'convergencia/convergences'. We have now somewhat playfully quantified the numbers of our strands or streams: Orlando has identified – was it 45, or 78?! Here are some of the variants I listed at that time (Wadsworth, 1997): systems theory, organisational development, experiential analysis, collaborative research, communication studies, organisational learning, critical analysis, adult education, popular education, communicative ethnography, process consultation, restorative justice, computational organisational semiotics, critical constructivist and some interpretivist sociology, some applied social research, some clinical sociology, participatory research, participatory action research, collaborative inquiry, reflective practitioner, practice research, quality improvement (total systems/continuous improvement), social cybernetics and

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often to pick up different perceptions of the 'same' phenomenon; more understanding of other constructivist issues (e.g. increasing use of peer interviewing, and the explicit inclusion of multiple stakeholders' differing views on project committees – some of which are transforming into inquiry groups; and even the inclusion or extension of 'pilot' or preliminary work, plus more post-review follow-up, as well as talk of 'dialogue' and emergent elements (such as under the rubric of organisational development, the learning organisation or continuous improvement) to extend research or evaluation's iterativity and longitudinality (Wadsworth 2001, pp. 56-57).

human soft systems, action science, action inquiry, developmental evaluation, 'fourth generation' evaluation, naturalistic inquiry, constructivist methodology, train-the-trainer methods, community development, conflict resolution and mediation, family therapy, and community education. Twelve clusters (including Daniel Selener's four) that I now group the variants into for teaching purposes are a chronology from the 1920s to the current day of: urban welfare; ethnic & immigration/settlement; community development; industrial/workplace; education/schools; agriculture & farming; civil rights; the people's science movement; adult education; international development; health and human services (including arts, architecture, planning, recreation, youth, the new public health etc.); organisational development & organisational learning; second wave feminism; and fourth & fifth generation evaluation.

Of course the number is ever-expanding as we connect up with the comparable elements in many different disciplines and fields of endeavour, and the role of ALARPM also is taking new shape in response to this.[4]

Recently our annual ALARPM national conference – aptly named 'Different Journeys' – took place in association with three other disciplines and endeavours: the Australian Facilitators' Network, the International Association of Public

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[4] Even our organisation's name alerts us to how, from our own beginnings, we were combining at least three important traditions: action learning, action research and process management (ALARPM) representing activity going on particularly in higher education, business and government circles. Latterly we moved to include a fourth (particularly in our combined world congresses) – the participatory action research tradition represented in adult and community education, urban and community development, immigrant/settlement, indigenous and other critical movements, developing world, agriculture, environment, community health and community/human services. From time to time we think about a simpler more generic name, perhaps the international Action Research Association, as it is difficult to keep describing a selection of streams each time we want to mention our general paradigm. Suggestions are welcome!

Participation, and the new Southern Cross Institute for Action Research. Besides all having our esteemed member and friend Bob Dick in common :-), we have, we realised, some fundamentally shared paradigmatic assumptions.

Future conferences as well as future world congresses expect also to include other kinds of groupings with which we share common assumptions. Our convergences so far however seem more to be in the sense of the term's meaning of 'meeting at a point in time and space' rather than a collaborative merging per se. Indeed it seems to be a bit like 'parallel play'! Next we might more explicitly dialogue around comparing and contrasting our similarities and differences (e.g. panels of different strand folk address the 'same' topic or problem). Later still, when we are even clearer about what we know differently or similarly, and have begun to learn each other's languages, we may work together even more creatively.

I am thinking of the dialogue stages of at first discovering (delightedly) 'oh, we are the same'; then the next stage (slightly dismayed) realisation 'oh, no we're not, we're really different'; then, if we persist, we find the (deeper) realisation that underneath we *are* 'the same' after all... followed by the next and (even deeper) realisation that, oh oh, we are actually really *really* different... But then, *if* we go even deeper, we are reassured again that... and then, it's 'turtles all the way down' (of difference *and* similarities) forever!

In encountering others like this, any vitally alive organic system attends to both its boundaries (what it is *within* the organism which is essential to maintain identity and function) and its connections outwards to other organisms/systems (what it is *outside* that is a source of new life energies, creativity and needed change). With no boundaries we may collapse or dissolve and no longer offer a distinct resource to the meta-system. With too strong boundaries we may at first self-protect, but risk becoming insular, narrow and obsolete.

Denis Cowan gets ready to lead us on some 'different journeys' at the annual ALARPM conference, held in Brisbane (involving threading together people with strands of coloured loom yarn]

Ron Passfield and Ortrun Zuber-Skerrit, co-founders and life members of ALARPM – from the higher education, managerial & organisational learning strands of the action research field (backdrop: the Public Participation forum worksheet at the ALARPM conference in Brisbane).

ALARPM becomes an international network/er of networks, streams and strands

ALARPM – like many of its members' own efforts – intends being a vitally living organism and itself an action learning project around this business of reaching out! From its small beginnings more than a decade ago of one or two people, then several, then many in Brisbane, last year it stepped out to occupy further its international identity when its committee of management ambitiously 'went international' with more than 20 members! It was critical that that group – like the Brisbane group it was joining – got to know each other and build/ground its own understandings of ALARPM's agenda, which is what it spent most of last year doing. The combined results and a picture of our directions as a committee will be able to be seen on our website over the coming year.

Will you be surprised if I say this extended participatory process last year and the year before not only led to this ripening agenda and international committee with members more or less happily wanting to re-nominate – was *also* slow, a little complicated, left some feeling frustrated, meant we were late getting our journal issues to you, and we didn't have a lot of energies left over to attend to some other aspects of our organism? Hey, are we 'ALARPM/par-ers, or what?!

As an outsider to that immediate-past process, and on behalf of all we ALARPM members, may I say congrats to all who made it happen and who have still hung in there! And thanks to process facilitator Susie Goff who designed the creative, complex, but in the end valuably fruitful process (for those interested in the technicalities, it was a snowballing 'tree' of twin-paired phone conversations with e-recording of agenda ideas, 'outside in' starting with the most far-flung and new, and ending with those most central, i.e. the executive/Brisbane conference group 'base'). A technological/server blip meant a sad loss of the rich text of the lead-up thinking, although the consequent detail has been available; and some latter folks in the more time-consuming 'tree' didn't feel a strong-enough sense of inclusion for an extended period of time... but hey... *ancora imparo* ('I am still learning' – my old university motto![5]).

So. As I see it, ALARPM is supporting a now-maturing body of international practical thought and thoughtful practice which is beginning to find its place permanently in the mainstream of social research and human inquiry, and throughout the world on all continents. ALARPM is now even more explicitly doing two things: firstly it is building on the efforts of the past twelve years, and; secondly it is working out how to be a network (and networker) of networks.

Meat and potatoes

ALARPM is consolidating and improving its successfully-established and 'templated' 'basic members' diet' activities of:

- World congresses,
- Membership/networking directories, and our
- Sturdy little *ALAR* journal (our accounts of our own current practice and activities; accessibly written, etc.).

Now we have established their standards, we can refine and make them ever-more consistent with our theory-of-practice.

Vegetables, dessert and further catering

In addition, ALARPM is working out how to be a network (and networker) of networks. This is the exciting learning-by-doing expansion to be ever more connected to each other:

- Locally,
- Regionally,
- Nationally, and

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[5] Does anyone know the Latin for '*we* are still learning'? I think that sounds like a wonderful ALARPM motto!

- Internationally.

I personally have a vision[6], first explored 6 years ago with Morten Levin when we were both visiting the Cornell University participatory action research network in the USA, to literally 'map' the networks, people (and personal web pages), groups, centres, associations, institutes and networks globally.

Imagine if on our ALARPM web page you could click onto a giant world map that sparkled with hotlinks to hundreds of AR/PAR efforts. When you go to each one you encounter a wealth of information that has been placed there by those concerned: information (including photos) about meetings, contacts, mentors, people, project descriptions, recent thinking, conferences, seminars, courses, papers and articles, publications available, book reviews, photos, etc. etc. – and in ever-cascading scale of detail so that eventually you can click even on your own hometown and know who else is 'doing it' and what is going on![7]

Some reflections on a journey to some action research sites around the world

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[6] Others are forming a vision of ALARPM as a 50/50 e-based/hard copy organisation (e.g. e-updating of memberships, e-congress and other meetings registration, e-versions of the journal and membership directory – while still having hard-copy availability for those of us not being, or wanting to be, so electronic). Yet others envisage peer mentoring from the webpage, or other published developments of theory and practice.

[7] Shankar Sankaran is a central committee contact point for information re. the international scene, and Susie Goff re. the national scene here in Australia. Others might like to nominate to be an active information-gatherer for each other country? Over the coming year we hope to have the site prepared and some outline of the different kind of 'nodes' we envisage. Jo Murray from Tasmania is our key webpage co-ordinator, working with a small ALARPM sub committee.

In the meantime let me take you on a recent journey (real not virtual!) of some sites I visited June-August last year in the USA and UK and Europe. This is the kind of thing I envisage being armchair-accessible from an ALARPM website 'map' vision!

It is 28 years since, in 1973 – after not being entirely satisfied with my first research work (standardised, state-wide random sample surveys, put through chi square tests of significance to see what was 'true', never speaking face to face with a single human!) – I first encountered some London-based, inner urban, polytechnic people doing something called 'participatory action research'. This year I had the rare and hard-won opportunity of, having brought almost all my current projects to an end, to in part revisit some of where action research had got to in those three decades. So I set out for a bit of a 'grand tour' of action researchers in the USA, UK and Sweden who I had met, in fact, largely through ALARPM world congresses. What an energiser and an inspiration.

Minnesota – land of 10,000 lakes[8]

Firstly I met up with Jean King and Michael Quinn Patton in Minneapolis/St Paul. Jean like many in our field has taken some time out of academe to engage as a consultant in the field (education/schools AR) and write. (Others of us take time out from the field for a brief stint in the academy to teach or, if we are lucky, to write!) Michael continues to occupy an autonomous space so as to be able to work closely over extended periods of time with practitioners (human services, agriculture & developmental evaluation) and also write.

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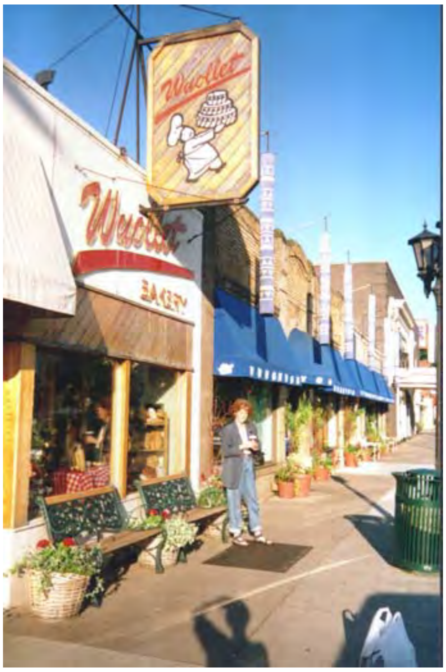
[8] Or as the local joke goes: 'Land of 10,000 welfare schemes'. This is a wryly proud joke. Minnesota is home to 'Minnesota nice' – a cultural caringness (what we might now call cultural capital) in the vein of Garrison Keiler's "Lake Wobegone Days" that corresponds with some surprisingly healthy social indicators.



Jean King – demonstrating both the grain-based old Minnesota economy and the importance of muffins for international networking

Many of us go on facing the perennial problem of working or researching with individual groups or specific clients and then wanting to write a meta account based on a series of these various experiences. But in the world of practice there is rarely funding for these kinds of books and papers. On the other hand, in academe where it was once a part of the role, the pressure is to teach larger classes of more students plus turnover lots of projects and grants and quick journal article publications, and again there is little time for lengthy contemplation, reflection and the more time-consuming writing of a book.

Michael and I also connect across to the action or developmental evaluation section of the evaluation profession. It seems to me in almost every profession, whether sociology, psychology or the health professions, there will be a small but vigorous group of people practicing the constructivist or AR/PAR paradigm in some shape or form – whether memory work in psychology or open space technology in planning or consumer research in human services.

New York State

I went to New York City and met with Sonia Ospina and Bethany Goodsoe to discuss their very interesting Robert F Wagner Graduate School of Public Service NY university consultancy (in which Dick Couto and Peter Reason were also involved) to a Ford Foundation and private trust award "Leadership for a Changing World" project. This involves designing a co-operative inquiry in which local people might want to reflect on how they and their local disadvantaged communities and their nominal leaders co-generate/d the differing conditions for successful leadership. On a sombre note, I stayed between Wall Street and NYU (Greenwich village) and most of my photos feature the silver towers of the then-ever-prominent World Trade Centre.

Then it was off to Ithaca to stay with Ann Martin who is now Dean of Extension at Cornell's Industrial & Labor Relations. This was where the late William Foote Whyte worked – one of my few sociological colleagues to see AR/PAR as the logical successor to positivism. The Cornell PAR Network, David Pelletier, Helene Gregoire, Susan Boser, Pat Haines, Carla Shafer, Nimat Hafez Barazangi, Scott Peters, and Philip McMichael of Rural and Development Sociology and about 50 others welcomed me for a seminar.

The Cornell PAR network, despite the difficulties we all face in sustaining voluntary independent outfits, goes on to bring together interested staff and graduate students year in and year out, from anthropology, policy analysis and management, dietary and nutrition, public administration, labour and industry, education, rural and development sociology, family and community, women's studies and other disciplines and departments. And it meets *weekly* (yes weekly!).

I particularly spent time with Susan Boser – soon to be working with another ALARPM committee member and USA regional representative, Betsy Crane, at Indiana University in Pennsylvania. Susan's doctoral work involved a whole-systems action research project (in this case even branching into changing legislation! – yip, in AR/PAR we get that sort of thing done before morning tea!). Her work reminded me that, while we of course make no *claims* beyond our own contexts, our depth of theory and 'reach' in terms of the extent and size of the system with which we have engaged *can* mean our work may well be useful to *offer* to even very wide circles of others (to then be judged by them in terms of *their* local knowledge and context – i.e. what I've termed predictive *possibilistic theory* rather than predictive *probabilistic theory*). I'd love to see a collected book of readings on deep theory/whole systems action research work.

Some of the Cornell PAR Network – Susan Boser (centre, turning), to her right, Helene Gregoire, and (seated, left) Carla Shafer

Boston

Then off to Boston College for a fast and furious and always energising exchange with creative-thinking Bill Torbert (of the action science strand in management); a catch-up with a prominent mental health consumer activist at Boston University, and – the main purpose of the front end of my trip – a long-in-the-planning, meeting between the two important streams of PAR folk and feminist researchers. Patricia Maguire, Mary Brydon-Miller and Alice McIntyre hatched this creative idea and engaged 20 or so of us in nearly a year's worth of e-discussions and paper-submissions on a threaded bulletin board. I found it interesting that a group could be both homogeneous on so many grounds and at the same time so many reported feeling so differentiated. Indeed the issue of insider/outsider (and the contexts that generate this) and the issue of "gap/gaps" and "bridges/ing" (or how we overlap or build solidarity and understanding – e.g. between "researcher" and "researched") emerged as one of the major themes; along with relations of power and control; PAR and the academy; community and academy; and the "resistances" we face.

L to R: Yoland, Alice McIntyre (Education, Fairfield, CT), Patricia Maguire (Graduate Studies, New Mexico), Jill Chrisp (Social Sciences, NZ) and Mary Brydon-Miller (Education, Cincinnati, Ohio)

Yoland and Anmol Satiani with the patchwork quilt pieces with which everyone introduced themselves and our relationships to the themes of the gathering

Mary Brydon-Miller expounds to Bud Hall how there are always "bottlenecks at the bridges" :-)

The web material is accessible at www.wnmu.org (scroll to "Special Services offered", click on "Bridging the Gap: Feminisms and PAR Conference", create an account by using your name as login plus choose a password (write both these down in case you want to return! And presto!). A book is currently being worked on.

London and the UK

Then it was whoosh, off to London and the Tavistock Institute, known for its long-standing work in the area of democratising organisational decision-making and problem-solution. Self-managed work teams emerged in the post war period as a major contributing strategy to industrial and economic reconstruction. Antecedent work on small group theory, socio-technical systems, and the operation of the unconscious writ large as structure by Eric Trist, Wilfred Bion, Fred Emery and Isabel Menzies-Lyth remain influential today in the organisational learning, organisational development and organisational culture movements. Elliot Stern heads up the Institute and also is editor of Evaluation, a Sage journal. A group of staff and I had an interesting seminar on the issue of building consumer/user-inclusive inquiry into the professional and organisational culture of human services.

Elliot Stern, Director
Tavistock Institute

Then it was up to Northampton at the invitation of Susan Weill to visit the people from the very inspirational SOLAR (Social & Organisational Learning And Re-animation) at University College Northampton – see their webpage at:

http://northampton.acuk/solar/

Susan Weill, Yoland, Carlis Douglas and Janet Ferguson eat lunch at the Cafe of Possibilities, SOLAR, UK

Carlis Douglas from London and Janet Ferguson from Jamaica ran a small group learning forum on organisational learning through use of the work of Augusto Boal and the Theatre of the Oppressed. Based on the assumption that the smallest cells of social organisation or incidents of social life contain all the values and structures of power, the work had its origins in real cafes and spaces and places in South America where theatricised talk gave an opportunity for participation under conditions otherwise too dangerous for more overt theatre or public speaking. With the room set up like a cafe we experienced a fragment of how changing the context could change the thinking and practice considered possible.

Then, after meetings with consumer-perspective action researchers in mental health and disability services, it was down to Brighton on the south coast for a flying visit to John Gaventa and Robert Chambers at the famed Institute of Development Studies, at Sussex University. The incredibly welcoming folk there showed me their marvellous collection of books and papers, and I met with Patta Scott-Villiers and Kath Pasteur around issues of organisational culture shift.

The road to Bath was literally via more visits with some activist mental health services users whose work focuses on a large consultancy group of consumers who provide training and education for health professionals (CAPITAL – Clients and Professionals in Training & Learning). The consumer/human service professional interface is a key site for working with issues of difference and distance, and mental health services a particularly intense site for this. Some very advanced praxis is to be found there among some particularly-thoughtful service users and providers. In Bath there were meetings with action researchers in management and professional practice (Peter Reason and Judi Marshall), social work (Mark Baldwin), and education (Jack Whitehead, Pamela Lomax, Moyra Evans, Jean McNiff and Moira Laidlaw and 13 other experienced practitioner graduate students, mostly but not all working in education settings). See seminar photo below. This is another group that meets weekly!

Bath Seminar – Pam Lomax and Jack Whitehead (centre far side)

At Bath – left to right, Robyn Pound (community Health Visitor, preventive medicine), Moira Laidlaw (currently teaching in China), Jack Whitehead (inclusive living practice-theorist), Yoland, and Geoff Mead (police education)

Steve Taylor, Judi Marshall, Yoland, Peter Reason and Kate McCardle, Centre for Action Research in Professional Practice, Bath University

The particular contribution of our paradigm seems to me to be in the areas where there is ambivalence of meaning, contradiction, and uncertainty, or gaps or conflicts between desire and practice, thought and action, intention and actuality. Whether working with gypsy communities in relation to schools or children in relation to spiritual tableaux, or the relationship between the Holocaust and school-teaching practice, or young women entering male corporations, the collective reflexive inquiry mode assists us to try and better understand ourselves in relation to others, and how those interpersonal relationships build into enduring structure and culture.

Then it was off to the Revans Institute for Action Learning and Research in Salford, Manchester and also to meet with Steve Young, Service Development Director, and the CEO and others from Salford Mental Health Services. Fruitful collaboration takes place between these two settings of

Steve, Abby and Mel in the Cretan Maze spiral stone circle and healing garden of the Creative Living Centre, Manchester (the stones were taken from the old asylum and are being 're-enspirited' by those going to the new centre)

university and NHS service sector, sparking theorised practice and practical theory. A remarkable Creative Living Centre (with its healing garden, Cretan maze stone circle, themed art painted walls in each room and forest of plants wall in the main meeting room) is one piece of living praxis – a consumer perspective result of Steve Young's work with the local community. Beyond this were training and education initiatives, support work with local government, and other deeply-engaged local projects.

Last stop in the UK was the Hull Systems Centre and some conversations with Gerald Midgley, Wendy Gregory and a group of others plus a subtle shift from Revans Centre talk of 'learning sets' to the language of 'community operational research', 'critical systems heuristics' and 'models of total systemic intervention'. Again a dazzling array of written papers confronted me as I yet again headed for the post office! This Centre has been a major source of written output – under both Gerald Midgely and its former Director Bob Flood (editor of the established and prestigious *Systemic Practice and Action Research* and author of *Beyond the Fifth Discipline*) – in the systems thinking and systemic thinking field.

Mike Pedler among people attending Yoland's joint Revans Centre & local mental health seminar on achieving organisational change and culture shift to collaboration between service providers and users.

David Botham (left) Director, Yoland, Steve Young, Mandy Chivers and Brian Allyson of the Revans Centre

Hull Systems Studies Centre seminar – Wendy Gregory and Gerald Midgley are to Yoland's right (front right, seated)

Sweden

After side trips in Yorkshire and Scotland for ancestor-tracking, the primary back-end reason for my trip was a week spent with Beth Maina Ahlberg, Solveig Freudenthal, Ann-Marie Friberg and colleagues at Skaraborg Institute in Sweden. In a pleasant rural regional centre, the institute is housed in the most prominent tower building on the town square. Few of us can say our action research centres are featured on all our home city postcards! Here we had some serious talks about how to build a research culture of inquiry processes into a wide range of health and human service initiatives, not only in Scandanavia but also in Africa where members of the institute work with various public health and health development projects. A two day seminar brought both myself and Tony Ghaye from the UK together with 30 or so folk from various Scandanavian regions to explore using PAR in practice, and to think about the same questions that had been with me throughout the journey:

Yoland, Beth Maina Ahlberg (Skaraborg, Stockholm University, Kenya), Ingela Krantz (Director, Skaraborg), Solveig Freudenthal (Skaraborg, Karolinska Institute), Tony Ghaye (Institute of Reflective Practice, UK)

What are the organisational and cultural 'hooks' or 'pegs' on which we can hang regular reflection and small scale data collection and analysis efforts? And how can these efforts be carried out in close relation to those who are the primary intended beneficiaries so that practice is closely calibrated to *their* needs and not too-distantly guessed at by professionals? How can dialogue across this critical distance be sustained?

In a way the trip ended with the same questions with which it had begun, but a goodly extra cycle or two further along. As with most of our endeavour, it's a matter of multiple cycles rather than one neat start along a straight line, then a stop!

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Mentoring as a learning strategy: Framework for a mentoring program

Sue Gold –

This paper describes the development and evolving framework of a mentoring program aimed at assisting mentors develop characteristics that lead to effective relationships and in turn provide environments for learning.

Background

How do we prepare practitioners for an essentially unknown tomorrow?

One proactive response to this complexity is a post graduate program developed at Cabrini Hospital in Melbourne. The program uses a facilitated participatory action learning methodology to enable participants to explore theories relevant to the program subject matter and underlying program principles, and to apply those to their specific work context. The subject matter relates to advanced clinical practice and acts as a vehicle through which underlying principles such as life long learning, managing and adapting to change, and systems thinking, are incorporated and made explicit when defining, developing and evaluating practitioner behaviours.

The program, titled the Advanced Clinical Practice Course (ACPC), is conducted over a twelve month period. Throughout the duration of the program reflection on and in action, sharing of experiences, development of learning skills and behavioural change is encouraged. A variety of learning strategies are used and peers, managers, mentors and the course facilitator support the participants throughout the program.

An action research project

The role of mentor emerged as having the potential to significantly influence the participant's experience of learning. It was this, and my broader role in education and staff development, that led me to wonder about the nature of the relationship between mentor and mentee. I held a belief that continuous, structured, supportive relationships could be developed in a way that would enhance individual and group learning. This belief was not always supported by the nature of mentoring relationships I had been exposed to. I further believed that the skills of learning, as well as learning outcomes, would lead to an enhanced ability to meet current and future demands of the work environment, increased job satisfaction and the continued development of high quality, flexible practice. Were these beliefs valid? Attainable? Either way, I was curious to know more.

An action research project emerged to explore three broad aims:

1. To identify and articulate which behaviours facilitated optimal engagement and learning within the mentoring relationship.
2. To understand how staff development personnel could utilize this understanding in developing mentoring behaviours in self and others.
3. To create a program that guides and facilitates the development of mentoring relationships.

The learning from this project loosely falls under one of three headings. They are "learning from and about the process", "learning about the curiosities" and "the mentor program". It is the Mentor Program that I shall address in some detail in this paper.

A definition of mentoring

My definition of the formal mentoring relationship has evolved to become "a prolonged exchange between professionals that focuses on the specific needs of the mentee to enhance learning, develop practice and responsiveness to change".

The mentor does not require expert knowledge, rather they offer a commitment to the relationship and a preparedness to listen and engage in dialogue. They may be called on to facilitate reflective practice, assist with goal setting, demonstrate systems thinking, lead in problem exploration and challenge decision making processes.

Overview of the mentoring program

The program was designed to assist mentors develop characteristics that lead to effective relationships and in turn provide environments for learning. The intent is to create an explicit agenda of personal behavioural change related to improving the mentoring relationship and enhancing learning skills. The form this change takes, however, is dependant on the participants and is not dictated by the program itself.

The framework is based on an experiential action learning model. The framework provides for a program that is very flexible, in that it may start and stop according to the needs of the participants and go on for as long as it needs to. It is made up of cycles and each cycle has three stages: a beginning, middle or development stage and an ending. Participants can nominate how many cycles they wish to undertake.

> *The beginning:*
>
> The beginning is about meeting, exploring some interpersonal skills and beginning to develop trust. Preferably, both mentor and mentee attend the first

Mentor Program meeting together. This may be in a group situation with a facilitator, or conducted independently. The pairing consider their goals and initial strategies at this meeting.

The middle:

The middle or development stage is structured to support the development of the mentor. The content and activities relate to enhancing interpersonal skills and learning behaviours, and exploring strategies to help with attaining the goals. I use the tools and skills of action science, but the choices are not limited to this. The content is related to developing behaviours that support learning. There may be one or many meetings scheduled for the mentors only to attend. Ideally these meetings are interactive with all mentors coming together to share their experiences and learning.

The ending:

The ending is about closure. This gives permission for the pairings to end the relationship or choose to continue. The goals are revisited. Achievements are celebrated. It's about giving permission for people to say "we didn't meet these goals, but that's ok, we're starting fresh". This was one of the really important findings that came out of the action research project. Some mentees failed to check out their goals along the way. By the time six months had passed they felt they couldn't turn to their mentor and say "these goals aren't relevant any more", or "you're not helping me reach my goals, can we reconsider and talk about this?" The program is designed to promote the "checking in" of participants as a normal and expected component of the relationship.

The notion of closure also sets a time frame. This can act as a motivator for those who would otherwise drift along in the relationship. The ending is one way of encouraging people to actively choose to remain in the relationship or not.

Before entering into a mentoring relationship, people need to consider their learning needs, style and skill. The role of mentor or mentee may not be the best strategy for the person at that time. It is also crucial to consider the interpersonal and learning skills of the mentor, ensuring these are sufficiently developed to meet the demands of the mentee.

I don't believe that being a direct line manager should exclude people from being a mentor. The skills needed to mentor effectively, and the dynamics that might limit the mentoring relationship, are broader than this one issue. I would only suggest that the dynamics of being mentored by a direct line manager be considered prior to entering into the relationship.

Format

The program structure can be represented on a one page document that indicates meeting dates and themes to consider. The pairing may choose to manage the relationship themselves or to attend programmed, facilitated meetings.

Each cycle is composed of a minimum of three meetings that are held at intervals suitable to the mentor's needs. I suggest this is something like once every three to four weeks. Increased frequency could work well in terms of mentor learning, but be more demanding of the mentor's time. I found less frequent meeting times to be undesirable as the mentors learning and reflection on practice was negatively affected.

Each meeting is between one to one and a half hour's duration. Preference is for the first meeting to be slightly longer (up to four hours in duration), depending on the prior experience of the mentors. The first meeting ideally includes the mentees. Group size is ideally less than twenty and more than four.

Between meetings of the Mentoring Program mentors meet with their mentee. Specific activities are suggested, along with flexible guidelines and other resources to support development of their relationship.

Content and activities

The structure is designed to give sign posts along the way. The content and activities are designed to develop behaviours that support learning; the content itself does not have to be learnt. Various themes explored in the cycles include learning styles, team roles and leadership, action science theory and tools, learning conversations, learning process and outcomes.

I believe a key element for successful mentoring relationships is a desire to learn through a collaborative relationship that enhances exploration of knowledge and practice. Developing such a relationship is ultimately dependant on the interpersonal characteristics of the mentor and to a lesser extent the mentee. Desirable characteristics of interpersonal skills include the ability to suspend judgement, and to employ acceptance, active listening, openness and self-awareness. These form a gateway to entry into a positive mentoring relationship. These skills must have been developed to a certain level before assuming the role of mentor. Characteristics of mentoring skills include each of the above, as well as the ability to constructively challenge, bravery in becoming involved in new experiences, making time available, enthusiasm and interest. These characteristics are further developed and reflected upon within the Mentoring Program.

Some of the content included in the program is specifically designed to assist people to recognize, prevent or manage dysfunctional behaviours. These behaviours may be demonstrated by the sabotaging of the relationship, bullying, deception and psycho-social dependence. The outcomes of these behaviours may be deleterious to the mentee, mentor and organisation.

The role of the facilitator

The role of the facilitator in the Mentoring Program is multi-faceted. Initially the responsibility is to develop an outline of content and structure relevant to the potential participants, managers and other stakeholder's needs. The program requires evaluation both during and after each cycle. Evaluation is focused on ensuring that the intended outcomes are being achieved and remain relevant. The facilitator also requires the skill to remain aware of and responsive to the participant's needs as they emerge. It may be necessary to restructure and/or alter content accordingly. The facilitator must also be prepared to manage dysfunctional mentoring behaviours, should these become evident.

The role of the manager

The final consideration relates to the role of the manager. The ACPC participants and mentors reported that their managers did not engage actively in their learning. Though the managers verbally offered support for the role to commence, the participants felt they did not show interest in, or understanding of, the role the mentors were taking. This is another element to consider when negotiating the relationship. Managers may require clear guidelines regarding the expectations of mentors and mentees.

Ideally the manager's role is to demonstrate enthusiasm and interest in the relationship and the goals of the mentor and mentee. The manager may choose to set expectations such as reporting mechanisms, if necessary, to support relationship development.

Reporting mechanisms may be of particular relevance if the organisation resources the relationship, in which case, it may have an expectation of remaining informed of learning outcomes. In this instance, a report would be structured to address specific themes or processes and capture the learning without bridging issues that are personal or confidential. The report would be prepared by and in consultation with both mentor and mentee.

The Mentoring Program, as described above, is now in its fourth year. It has undergone numerous evaluations and adjustments, the most significant being the focus of cycle one and two on the skills of "learning conversations" and the focus of cycle three and four on the "processes related to learning". The program has also evolved from its initial purpose as support for the mentors of the ACPC, to now include a varied cohort of participants from across the organisation.

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Reference groups that really work

Janet Rice –

What is a reference group? How does it differ from a steering committee?

I use the term reference group to mean a group of people drawn from the community, which aims to be broadly representative of the community. It will usually contain representatives of community organisations, businesses organisations, individual community members and representatives of other agencies. It usually fulfils the roles of both steering committee and advisory committee, although it is more honest in that it doesn't claim to be 'steering' the process. Generally steering committees don't steer processes and the more community representation they have the less steering they do.

This paper draws in particular upon my experiences as a consultant running five reference groups over the last four years. These reference groups have been part of broader consultation and/or community involvement processes, which have also included elements such as community workshops, brochures and surveys.

Aims of reference groups

Typical aims for reference groups (see table below) I have been involved in are:

- to build commitment and a sense of partnership in [the project/study/process] with a range of relevant interest groups;

- to establish community ownership of objectives, issues and evaluation criteria associated with the study;
- to ensure that key community interests and interested individuals are kept fully informed of progress, understand the issues and are involved in the development of [the project/study/process];
- to facilitate the development of ongoing positive relationships between [the agency] and members of the community with a particular interest in [particular] issues;
- to provide [the agency] with information and insights from the community;
- to enable people to learn about and appreciate viewpoints other than their own, in relation to [particular] issues;
- to provide a forum for resolving issues in a constructive and informed way;
- to review material and provide feedback before it is released for public comment.

Reference Group	**Members**	**Months of Operation**	**Year**
Barwon Water Water Resources Development Plan	20	18	2000- ongoing
Darebin Integrated Transport Strategy	15	4	2000
Yarra Bend Trails Strategy	10	12	1999-2000
St Georges Road water main replacement	3	8	1998-1999
City of Maribyrnong Street Trees Strategy	20	12	1998

These aims dovetail into overall reasons for involving the community. My colleagues Chris Johnston and Kristal Buckley have summarised these reasons as:

- because communities know a lot;

- community aspirations and needs are important in formulating policy and taking action;
- to build support for a public policy or action – or at least find out that there is no support;
- create wider community awareness;
- building shared ownership;
- discover and discuss conflict – difference and conflicting views need to be talked about if an agreed position is to be found[9].

Particular usefulness of reference groups in achieving the above (and beyond!)

Involving people and keeping your ear to the ground

An agency can run a process based on information brochures and asking people to respond to surveys but unless the process is well resourced it can be easy to miss out on a lot. People are busy – they have the best of intentions but don't get around to putting in their survey – it's somewhere in that pile of papers on the desk. They'd like to come to the workshop but it's on at dinnertime and there are kids to be put to bed; or it's on the same night that you've arranged to go out to the movies with an old school friend.

A well selected reference group ensures that all the main voices are there – and these people can be the agencies eyes and ears – reporting back what others in their groups and networks are saying. And people are much more likely to attend because they have been invited to join, the dates of meetings are set well in advance, meeting times are set to suit the participants; there are childcare arrangements, dinner is provided etc.

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[9] 'Communities: parochial, passionate, committed and ignored.' in Historic Environment, volume 15 numbers 1 & 2, 2001.

Building relationships and building ownership

Compared with workshops or public meetings, members of reference groups build relationships with each other and with the people running the process. They are ongoing, they are interactive and participants can see some tangible results from their involvement. The collaborative process builds ownership which can be transferred beyond the group. If people know that someone they trust has been involved in the process and is happy with the outcome then they are more likely to accept the outcome also.

Networking

A reference group can be a very useful mechanism to help get information out into the community. For example the Darebin Integrated Transport Strategy reference group did a great job in helping to distribute brochures and surveys to their networks.

Building partnerships

The ongoing nature of a reference group enables an agency to benefit from people's energy and enthusiasm about the project, and provides a way into an agency for people who have enthusiasm to get something done about it. It can build the potential for ongoing partnerships beyond the life of the group.

Listening and hearing

One of the particularly useful features of a reference group is that it provides the process and space that allows people to really hear points of view, other than their own. Differences and conflicts are acknowledged and discussed.

Where possible, the group can come to consensus agreements that acknowledge all the different positions and points of view. If they can do this, recommendations will be very powerful and difficult for the agency to ignore. If they can’t reach consensus that’s all right too. They don’t need to. Their role is to be a sounding board, to allow the agency to hear all points of view. But even if consensus isn’t reached, the effect of listening and being heard can mean that groups stop demonising each other, and acknowledge some truth in the positions of others. They are more likely to accept an outcome developed by the agency that isn’t entirely their way.

Towards community development

I generally want to add value as much as possible to the consultation process – to use the process as much as possible for building community and community development.

Building knowledge and awareness, building participants’ confidence in participating in public policy processes; and establishing networks, are all important building blocks in building community and empowering people to take action on issues that affect their lives.

Climbing Arnsteins ladder – sometimes subversively

A reference group shifts the process closer towards collaborative decision making. In most consultation processes that I have run the agency wants to remain fully in control. They want to consult and then take what they’ve learnt away and make the decision themselves. A reference group allows them to officially maintain that control, yet the nature of the process means that if a representative group, in full awareness of all issues and with the input of appropriate technical expertise, does reach consensus about an issue then it’s extremely powerful. It is ignored by the agency at its political peril.

Some successes!

Barwon Water Water Resources Development Plan

The Barwon Water Water Resources Development Plan reference group has 20 members who were selected from more than 80 people who applied to join. It includes representatives of local councils, business organisations, community organisations and individuals. It has met five times during the last year, and will continue to meet bi-monthly until mid 2002.

The ongoing nature of the group has allowed people to gain a much deeper understanding of water issues than if they had been attending a single workshop. Their views consequently have been given more serious consideration by Barwon Water.

The group has been an effective way in addition to other mechanisms such as workshops and surveys for Barwon Water to gain a good understanding of the communities' view and attitudes about water issues. Having an ongoing group has also meant that as relationships between members have developed some people have been more comfortable in expressing their views than in stand-alone workshops.

The group has been particularly useful in building ownership of the process. They 'signed off' on criteria for determining which water resource options would be short-listed; and have okayed all consultation materials that have been distributed, after having had input into the content.

Finally, the existence of the group has been very effective in demonstrating the depth of feeling and level of consensus across the community about issues such as the need for more action on reducing water use, and encouraging rainwater tanks. They have 'steered' the plan into a much more serious consideration of these issues than would have otherwise been the case.

Maribyrnong City Council Street Trees Strategy

The most notable feature of the reference group for the development of the street trees strategy was that it consisted of a maximum of 30 people. However most meetings were attended by 15 to 20 people. We decided to accept everyone who applied to be on the reference group and judged (accurately as it turned out) that it was unlikely that all 30 would be able to make any one meeting.

What accepting 30 people did was to give them all a strong sense of connection to the process and ultimately support for its implementation.

The reference group didn't excel at involving people in strongly interactive process about the strategy – many meetings consisted of a lot of information being presented and then some feedback from a relatively small number of people present. However it informed people, gave them the opportunity to contribute, and vastly increased the spread of knowledge about the strategy into the community than would otherwise have been the case.

Some challenges

Yarra Bend Trails Strategy

The Yarra Bend Trails Strategy reference group was a group, which had strong conflicting views in particular about the appropriateness of mountain bike riding in the park. There was little expectation that it would reach consensus.

The group succeeded to some extent in sharing perspectives and understanding of the different positions, and those who weren't strongly attached to either viewpoint thought it was effective in doing so. These people also felt that the existence of the reference group helped to shape the strategy outcome.

Those with strong viewpoints either way , however, came through the process of 4 meetings with their views largely unchanged.

The final strategy allowed some mountain biking in the park but not on the paths most desired by the mountain bikers. The anti mtb's were happy, and the mountain bikers were as antagonistic to Parks Victoria as they ever were.

The process was useful to some extent, but as a model for building ownership and consensus, much more was needed.

Building partnerships

In two of the reference groups I facilitated there were opportunities for the relationships to develop into ongoing partnerships, but these have yet to occur. In the case of the Yarra Bends Trails Strategy, the members of the mountain bike community were keen to work with Parks Victoria on trails construction and maintenance within the park if mountain biking was permitted in the park. There is still some uncertainty as to just how much is to be permitted, so this partnership currently isn't being developed.

The members of the Darebin Integrated Transport Strategy reference groups could be working more effectively with City of Darebin on common aims of the transport strategy. They were keen to do so following the completion of the reference group, which oversaw the consultation process on the draft strategy, but lack of skills and resources within Council has meant their energy has not been harnessed in an ongoing way.

Size of group

Because of the advantages in harnessing energy, building relationships and maximising the building of networks, most of the reference groups I have worked with have had relatively large numbers so people on them – certainly far more than can easily interact together. They need good facilitation, time, techniques of breaking into smaller groups as appropriate and great awareness and attention to whether people are being ignored and/or marginalised.

When is a reference group not a good idea?

St Georges Road Water Main

The replacement of a water main in St Georges Road Preston was a Melbourne Water project that had the potential of being controversial. A different section of the main had been replaced a few years before and there had been considerable controversy in the community about appropriate landscaping after the works. A reference group for this project was set up to make sure that we knew what community feeling was, and could work with the community to resolve it.

The problem being there was no controversy for this section of road! We had a reasonable turn-up of 10 or so people for the first meeting, but attendance then dwindled to only two community representatives as the project continued. The issues involved weren't significant enough for people to give their time to coming to meetings. We should have pulled the plug much earlier! The lesson was that reference groups are unlikely to succeed unless the project or issues involved are on the community's, as well as the agency's, agenda.

Reference groups that really work!

Three important lessons from my experiences running these reference groups are:

1. Make sure the issue or process being considered is of interest to the community.
2. Don't be scared of big groups – but make sure you have techniques to ensure that these large groups are effective.
3. Where there is conflict spend the time to address it, even if you can't or don't have time to resolve it.

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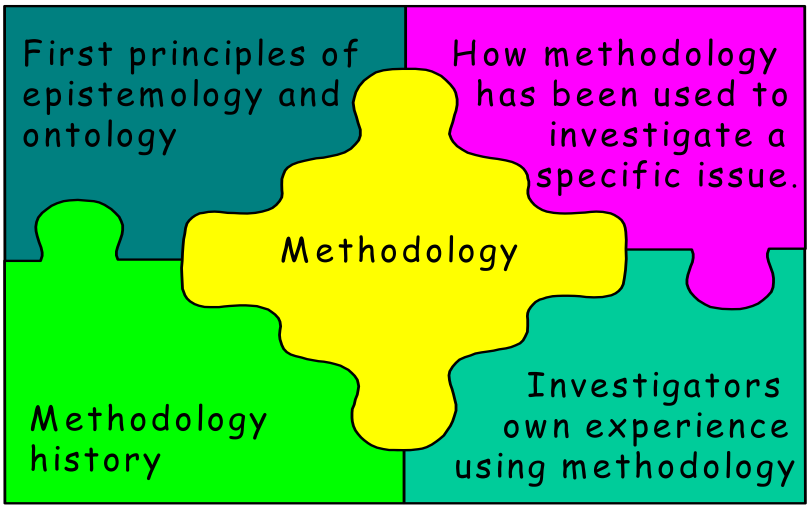
Storytelling as inquiry
– Geof Hill

Introduction

This paper is about an inquiry methodology and its use for undertaking workplace investigations[10]. My own view of research and inquiry methodologies is that they can be explained and justified through four different pathways[11].



[10] In this article I am distinguishing between three different words used to describe research. I have used the term **investigation** as a generic word to describe research. I have used the word **research** to indicate investigations undertaken in the context of the positivist paradigm. I have used the word inquiry, in line with Reason and Marshall (1987, p.113) who used the word "inquiry" to indicate investigations undertaken in the context of a post-positivist inquiry paradigm. Within this article the term post-positivism is used, in line with Guba and Lincoln (1994) who described it as representative of efforts in research discourse to respond to problems with positivism.

[11] This is a model to facilitate my own understanding of inquiry methodologies and I am not suggesting that the pathways are the only pathways.

1. *First principles of how knowledge is acquired (epistemology) and what constitutes truth (ontology).*

The practices of investigation have been informed since Greek times by debates surrounding the questions – what is knowledge? (epistemology), and – what is truth? (ontology). Each investigative method is grounded in an investigative paradigm[12] (set of beliefs) which explores such questions as:

- What is knowledge and how it is acquired?
- What constitutes truth?
- What is data, how will it be collected and how will it be analysed (methodology)?

(Guba & Lincoln, 1994; Denzin & Lincoln, 1994; Reason, 1994)

One of the ways to understand a specific methodology is to contextualise it in first principles of the ontology and epistemology.

2. *The history of the specific methodology.*

Investigative methodologies are developed in response to a particular issue. In this regard, each methodology has its own history. Once the methodology has joined the ranks of possible methodologies it can be adopted to investigate other issues, and as a result its original history may be forgotten. A second way of understanding a methodology can be to contextualise it in its developmental history.

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[12] Guba and Lincoln (1994, p.107) defined paradigm as:

a set of basic beliefs (or metaphysics) that deals with ultimates or first principles. It represents a worldview that defines for its holder, the nature of the 'world', the individual's place in it, and the range of possible relationships so that the world and its parts, as, for example cosmologies and theologies do. The beliefs are basic in the sense that they must be accepted simply on faith (however well argued); there is no way to establish the ultimate truthfulness.

3. *How the methodology has been used to investigate a specific issue.*

Once developed, an investigative method can be used in a range of settings and used to address a range of issues. Each time a method is used, and that investigation is published, the publication informs new investigators' understanding of the method. Sometimes when an investigator is arguing for the choice of a specific methodology, they use the argument that the methodology has been used before to investigate a particular issue and that therefore it can be used again to investigate similar issues.

4. *The investigators experiential discourse in using the methodology (research practitioner reflection leading to improved research practice).*

When an investigator uses a particular investigative methodology, their own experience in using it also contributes to the growing understanding about that methodology. This experiential knowledge informs their current practices of using the methodology.

Storytelling as inquiry

In this article I am describing my own use of a particular investigative methodology that I have called *storytelling as inquiry*. By using the word *inquiry* I am positioning the investigative paradigm as post-positivist (see footnote 1).

In my own use of the methodology (Hill, 2001) I argued that it was positioned in an experience or practice based epistemology and a constructivist ontology. This meant that I was suggesting that my knowledge was arising from my own experience, and, in line with Schon (1983), was arising through reflection about my practice or experience. It also meant that I was positioning myself with regard to truth, in line with Kelly (1955), suggesting that truth was not a single and consistent entity and was constructed by people around different issues and different times.

In my own journey as an investigator I was introduced to the notion of storytelling as inquiry through Reason and Hawkins (1988). They advocated storytelling as inquiry as a way of undertaking inquiry into one's experiences or practice.

> *Meaning is part and parcel of all experience, although it may be interwoven with that experience that it is hidden: it needs to be discovered, created, or made manifest, and communicated.* ***We work with the meaning of experience when we tell stories,*** *(my emphasis) write and act in plays, write poems, meditate, create pictures, enter psychotherapy etc. When we partake of life we create meaning; the purpose of life is meaning. Here we follow James Hillman (1975) who argues that 'my soul is not the result of objective facts that require explanation; rather it reflects subjective experiences that require understanding' (p. 15). Indeed, Hillman has developed his own rich archetypal epistemology 'of the heart', based on loving and personifying as a way of knowing, which is one of the influences of our thinking.* (Reason & Hawkins, 1988, p. 80)

In my understanding of the methodology I have also drawn on related work by Clandinin and Connelly's (1994) with their notion of narrative inquiry. In particular Clandinin and Connelly (1994, p.416) differentiated between "story", which they describe as the phenomena of the lives lived, and "narrative" which is the inquiry into that story often conducted by another.

Starting with stories

As the investigative descriptor suggests, this methodology is based around stories, and the first step in using such a methodology is to elicit stories. While these stories could be about anything, I recommend that they are associated with some particular event or issue. When people tell their stories about an issue or event they can be first hand stories (what I call **primary stories**) or they can be second hand accounts of the issue or event (what I call **secondary stories**).

Ways of documenting stories

There are different ways of documenting stories. Some practitioners tell their story in the form of an autobiography, others maintain journals or log books. They may choose to tell their stories orally or write them down. As many of the analysis methods for storytelling involve text analysis, it is important that there is a text document, even though that text may have been initiated as an oral account.

Writing a story also has implications for the story analysis.

> *Writing is a way of finding out about yourself and your topic. Although we usually think about writing as a mode of 'telling' about the social world, writing is not just a mopping up activity at the end of the research project.* ***Writing is also a way of 'knowing' – a method of discovery and analysis*** *(my emphasis).* (Richardson, 1994, p. 516)

Denzin (1994) elaborated on how writing one's story is a form of analysis.

> *Moving from field to text to the reader is a complex, reflexive process. The researcher creates a field text consisting of field notes and documents from the field. From this text he or she creates a research text. The researcher then re-creates the research text as a working interpretive document. This working document contains the writer's initial attempts to make sense of what has been learned. The writer next produces a quasi-public text, one that is shared with colleagues, whose comments and suggestions the writer seeks. The writer then transforms this statement into a public document which embodies the writer's self understandings, which are now inscribed in the experiences of those studied. This statement, in turn furnishes the context for the understandings the reader brings to the experiences described by the writer.* (Denzin, 1994, p.501-2)

Single stories and collections of stories

Sometimes a study can be centred around a single story, or may be based on a collection of stories associated with a single event or issue.

Making sense of the story(ies)

A story conveys meaning in its own right. Telling a story combines description along with explanation. As soon as events have happened and are told in retrospect then the story contains both the reconstruction of the events along with first reflective explanations of those events (Miles & Huberman, 1994). Telling a story thus opens it up to a first level of analysis whereby the storyteller, in hindsight, recognises explanations embedded within a story.

Stories take place in contexts. Sometimes these contexts are not recognised until after the events in the story have passed, and so reviewing a story in the hindsight of its contexts provides an analysis of those events. Clandinnin and Connelly (1994) called this the "outward dimension" of a story and placed this in a framework of inward and outward, backward and forward dimensions.

> *By **inward** we mean the internal conditions of feelings, hopes, aesthetic reactions, moral dispositions, and so on. By **outwar**d we mean existential conditions, that is, the environment. … By **backward and forward** we are referring to temporality, past, present and future. To experience an experience is to experience it simultaneously in four ways and to ask questions pointing each way.* (Clandinin & Connelly, 1994, p. 417)

In my own use of the methodology (Hill, 2001) I have emphasised that events and issues raised in a story can be contextualised through reference to literature about those issues. I have called this '*benchmarking*'[13] and suggested that it involves reading literature pertinent to an event or issue, after the event, to make sense of the event or issue in hindsight. The benchmarking serves to set a context for the situation, which, from a practitioner researcher perspective, defines the problem and the solution from the practitioner's point of view (Groundwater-Smith, 1991).

Stories address a range of issues and the way in which they address these issues draws on an array of linguistic and rhetoric devices. These devices themselves can offer a form of analysis. The words used to describe or comment on an event or issue can open the story to analysis by examining the real or iconic meanings of such words. The metaphors used also provide a means of analysis.

Within the story there can be evidence of the storyteller's beliefs about the event. Identifying these is moving into an analysis called "critical reflection". Boud & Walker (1993, p. 10), defined critical reflection as:

> *reflection on presuppositions which we hold about ourselves and the world. It helps us to develop knowledge that leads to enlightenment and emancipation from those influences, external and internal, which dominate and oppress us. It is a knowledge of the false assumptions in our personal foundation of experience which limit our freedom and which need to be worked with creatively to achieve a new way of experiencing. The process that is involved in critical reflection is reflection which leads to knowledge and constraints in our experience.* (Boud & Walker, 1993, p.10)

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[13] A point has been made to me about my choice of the word benchmarking and its association with a positivist notion of best practice. While aware of these implications, I have used the word in resonance of the higher education practice of undertaking a literature review, where reference is made to currently published literature (as the benchmark) to assist in making sense of specific data.

The application of the word critical to this definition represents a resonance with the notion of “critical social practice” which involves reassessing one’s practice in the light of consciousness raising about the theoretical basis for the practice. This notion draws its history from the theories articulated by the “Frankfurt school” (Carr & Kemmis, 1986; Zuber-Skerritt, 1993), and their critical evaluation of the principles of positivism and interpretivism.

The truthfulness of the stories

Stories can be both fictitious and non fictitious[14]. When a story is used as the primary evidence for putting forward an argument, the question will often be asked: did the events in this story happen? This question can be answered either by authenticating the events with artefacts (McNiff, Lomax & Whitehead, 1996) that provide evidence of the events taking place, or by providing “thick description” to contextualise the events. “Thick description” in contrast to “thin description” gives the context of the experience and the intentions and meanings that organise the experience (Denzin, 1994, p.505). An investigator can also challenge the question of whether the events in the story actually happened by suggesting that the reader focus on the way in which the events are interpreted rather than whether they happened. Mischler (1990) suggested that the latter is particularly the case when an inquirer is arguing from a constructivist ontology.

When the study involves a number of stories then the contrasts between stories can provide evidence of common and uncommon themes. When other’s stories are used, and the analysis is going beyond what was stated in the story, it is important to check back with the original storyteller (**memberchecking**) to ensure that the new meanings

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[14] I have used this simple scaffold to distinguish between stories in which the events are real and those in which they are not.

constructed from the story are meanings with which they are comfortable.

Any event can be understood by the stories told about it and, for this reason, storytelling is a useful tool for undertaking inquiry. When people associated with a particular event, issue or workplace are encouraged to tell their stories, they provide rich data for understanding the situation and the stakeholders associated with it.

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I welcome comments and discussion about this paper. Please contact me at Geof@bigpond.com

Journey towards interdisciplinary education: Experiences from a Danish agricultural university

– Nadarajah Sriskandarajah & Lone Lisborg

An academic group providing basic undergraduate courses in methods and project work was strengthened by new appointments and shifted from a teaching only to a teaching and research role. This was welcome, but led to internal tension and an unclear identity. A participatory process enabled new vision for the organisation to be set and an accurate and inclusive name being agreed upon. Challenges of working with competing interests within academia are identified and discussed.

Introduction

The Royal Veterinary and Agricultural University of Denmark (KVL) is a 150 year old institution with origins similar to many such institutions around the world which support the vocation of cultivating land and production of food and fibre. There was widespread adoption of the reductionist approach and the Cartesian scientific method to problem solving that began in the seventeenth century and shaped European thought in a profound way. Fragmentation of scientific endeavour along disciplinary lines had become the cornerstone for development of education in agricultural science at universities and, subsequently, in research institutions through much of their history.

The wave of changes beginning in the 1970s that led to the development of new university pedagogical principles of project work in groups, problem-orientation and interdisciplinarity at the new university centres in Aalborg and Roskilde also touched the agricultural university in Denmark. Around this time, there was internal discontent felt by students and the central study board about the curriculum and teaching methods in use at KVL, and about the rising rate of student dropout within natural science programs in general. These feelings also mirrored the need for the curriculum to better prepare graduates to deal with the growing complexity in the field of agriculture. Inspired by the innovative Systems Agriculture program set up in the early 1980s at Hawkesbury Agricultural College in Australia, one specific curricular initiative was undertaken at KVL. A new teaching group with the title of Methods and Project Work (MOP) group was set up in 1989, initially with external funding, and later subsumed into the University's structure. This group offered special courses in problem-oriented project-organised learning, having developed its own praxis of teaching and supervision (Andersen et al 1995). By 1998, work among the group, which was purely teaching for the first few years of its existence, introduced research work in order for it to be accepted as a 'normal' university academic group.

This paper describes the first phase of the transition of this university academic group from its 'teaching as a service' role to an interdisciplinary 'teaching linked to research' role, and the authors' experience as facilitators of some of that process. One of us (NS) newly appointed to the unit, moved from Hawkesbury in Australia in late 1999, and the other (LL) had been a PhD student within the group working on research communication.

Visioning and re-visioning

During 1999, the group consisted of eleven academic staff and two secretarial staff, three of the academics being permanent lecturers, six on short-term appointment as teaching assistants, and two as PhD students with some teaching responsibilities. The primary teaching responsibility of the group until that time was the offering of compulsory units to undergraduates in various streams of education at KVL. Each of these semester-long course units, referred to as Methods and Project Work, are centred on a project, typically undertaken by a group of 3-6 students. The teachers in the group served as facilitators to the project groups, and an emphasis was placed on the experiential learning of the students and the completion of a project report to a professional standard.

The mandate of the newly expanded group included the offering of additional new courses and undertaking of research in line with its broadened frame of reference. The description of the three new permanent lecturer appointments gave an impression of this broadened frame, which included philosophy of science, communication, and extension education. Previously, there had not been any serious internal allocation of resources at KVL to cover these areas. The choice of the three particular themes came partly from the impression that KVL graduates needed a broader competency base than just their areas of natural sciences. The more important rationale was to do with choosing titles that were recognisable and acceptable as university research areas by the scientific community.

One of the first activities undertaken by the group was to describe its areas of research in detail, demonstrate the inter connections between them and to link these to the existing teaching program. Through a series of seminars and workshops, the group had arrived at a vision paper and a model describing its planned themes for research. This research was to be undertaken primarily by the permanent staff and the PhD students.

It was at this point that the first author joined the group as a permanent lecturer. Although he had maintained some contact with the group over the previous ten years of its development, he felt it was important to understand the structure and functions of the newly expanded group and its expectations of him. The first impressions were that the rapid expansion of the group and its new mandate were presenting it with challenges in an organisational sense, as it was searching for its place in the university environment. The group agreed that they would go through a facilitated process of organisational review, considering the mutual benefits of such a process.

The facilitated process and the issues identified

The size of the group has been fluctuating between 12 and 15 people. This included 2 or 3 permanent lecturers, 5-7 teaching assistants (TA), 2-4 PhD students and 2 administrative personnel. Currently, one of the three permanent positions is vacant while there are 5 TA, 4 PhD students and 2 support personnel. The group has maintained from the time of its inception a flat structure and a participatory decision making process. In line with university requirements, the group has a leader who represents it on departmental and university boards. Until now, the group also manages its own annual budget, somewhat independent of the department it is part of.

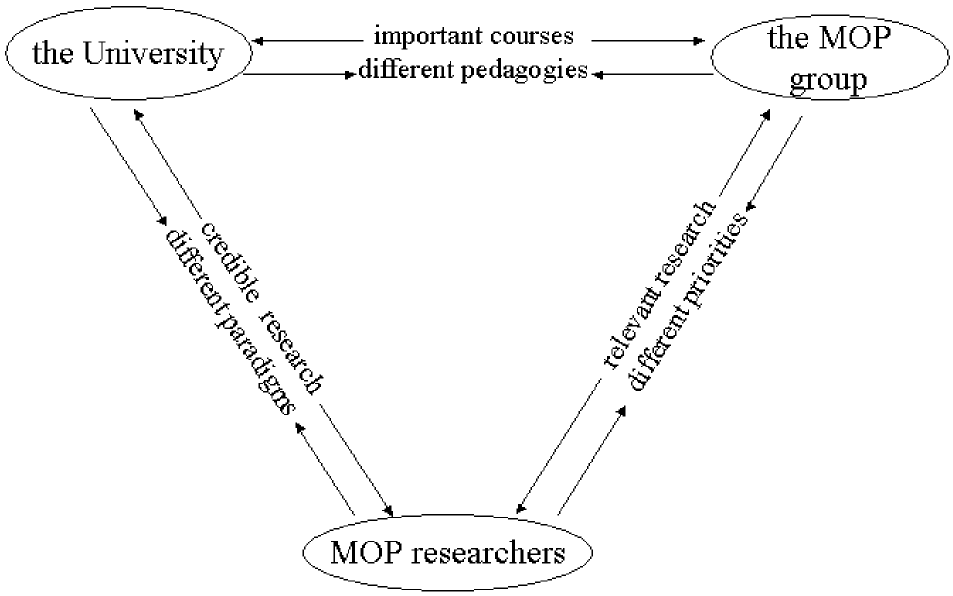
The review process set in motion in January 2000 is an action learning-action research (ALAR) process in which the whole group has been engaged. The process followed in the first six months of 2000 and its outcome is the subject of this paper.

A modified version of Checkland's Soft Systems Methodology was adopted for the first phase of this ALAR process (Checkland 1981). Stakeholders connected to the group's work including all members of the group, the Head of the Department and the university Rector were interviewed as part of creating a rich picture of the situation. Following presentation of this initial picture to the group, relevant themes were identified and a handful of issues were chosen for further work. Conceptual model building was used as a step in the process to determine desirable and feasible changes for implementation. Participatory workshops, both in plenary mode and in theme-based groups, were the main tool used to move through processing of issues and for debating and learning about other strategic matters.

Some relevant themes identified from the rich picture of the organisation are highlighted here. These themes related to the organisation's *history*, *structure*, *people*, *culture* and its management *processes*. A look into the history of the group as an organisation revealed that a major shift had taken place from it being a group with a single, well defined core purpose to becoming a group with several, unclear and less-defined purposes. Coinciding with this was another shift from an organisation with no clear structure and no status to one with a more clear structure and recognisable status. The size of the organisation and the diversity and distance between people who constituted it, had created a feeling that the collegiate management style was no longer appropriate or effective. The self-image of the organisation and its image in the outside community were another important theme that required further action. There were also clear areas of tension identified in relation to the organisation, the wider university environment, and the research and teaching functions of the organisation. These areas of tension or dissonance in the organisation are depicted in Figure 1 as the arrows pointing inwards in each arm of the triangle.

The MOP group was perceived by the university to be offering important courses to undergraduates, its researchers were conducting credible research and the group itself expect its researchers to conduct research relevant to its teaching function. However, the reality was that there was dissonance in each of these areas. The pedagogic approaches of the MOP group based on experiential learning theory and group-based projects stood out as different from what were the norms in majority of the university programs. The constructivist research paradigm promulgated by researchers within the group was in contradiction to the dominant positivist paradigm of majority of the university's researchers. A further area of dissonance within the group itself was as a result of differing priorities held by the permanent lecturers and other teaching staff with respect to the relative importance placed on research and teaching. The permanent lecturers felt a strong need to prioritise research above teaching and the rest of the teachers felt the opposite.

Figure 1. Areas of concurrence and dissonance in the organisation and its environment



The issues chosen for further work and action turned out to be the ones crucial to building good inter-personal relationships within the group and a more favourable image in the university community. An extended workshop was undertaken to evaluate the flat management style and the participatory decision-making model in use within the group. Significant improvements with regard to meeting procedures and sharing of information were made following this workshop. Similarly, an extended session devoted to trust building within the group was also completed. Discussions around the question of organisational image led to a separate consultative process, facilitated by the authors, which eventually led to the adoption of a new name for the group. The original name, Unit for Methods and Project Work, had been in use for nearly ten years and well known within the University, was seen to be placing the emphasis only on the type of methods-oriented courses taught by the Unit. The new name, Unit for Learning and Interdisciplinary Methods, the most popular out of a handful of names suggested, was found to be more appropriate in its emphasis on the process and the paradigm espoused by members of the group in different aspects of their professional work. This name was found to be capable of giving the university community a clearer signal of the shift that had been made from being a purely teaching unit to one that was engaged in all facets of academic life.

The need for congruence between research undertaken by academics and the teaching they do should be unquestionable in good university practice. However, in reality, the research-teaching link is a tenuous one in most situations, however, the need to demonstrate this link seldom arises within conventional university disciplines. The establishment of an interdisciplinary academic group, particularly one that attempts to bridge the natural and social sciences in a traditionally natural science setting, was viewed as a deviation from the norm and thus the research-teaching link comes under close scrutiny, as certainly was the case at KVL. The MOP group has had to grapple with this question continuously, not just because of a requirement from above, but also in view of the diversity of interest and background among members of the group and the felt need for establishing a milieu which combines theory and practice.

The organisational development process described above took place during the first six months of 2000, and continued in the form of ALAR through the following year and a half. There were two distinct retreat sessions undertaken by the group, referred to as vision meetings. The first of these held during the second half of 2000 led to the adoption of 'Reflective Practice' as a phrase that describes the over riding commitment across the group to their professional work. It also led to the production of a strategy paper, which was an attempt to demonstrate to the university administration, the many facets of planned development of the group and its potential to a modern university. The second vision meeting held in November 2001 with assistance from an external facilitator led to the creation of an elaborate action plan. Elements of this action plan, particularly those related to the development of collaborative and interdisciplinary research within the group, are being implemented at present.

There have been some significant changes in the educational environment in recent months and the group has had to make adjustments continuously. These changes have provided opportunities as well as challenges to the group. It appears that the on-going learning process built into the practice of the group, has enabled it to deal with the perturbations effectively. This form of reflective practice, though uncommon in a traditional university departmental structure, has much meaning and relevance for active and progressive learning organisations.

Some reflections

The reflections from the first phase of this process were presented as thematic questions at a workshop for facilitators, during the ALARPM – AFN Conference held in Brisbane in October 2001. Several themes, each with a key question and a set of subsidiary questions were presented. Workshop participants chose the themes according to their interest, discussed the presented questions and related issues and produced a poster of the outcome of their work for presentation and discussion in plenum. They were encouraged to draw from similar or related experiences of their own. The themes and the outcome of discussions are presented below:

1. Role of facilitator

This discussion considered the issues around facilitating change in an organisation one is part of. The questions that were raised concerned the facilitator's level of detachment, potential conflict of interests and the tension between the facilitator enabling change on the one hand and consciously directing choices on the other. Participants were invited to bring forth their own challenges and experiences.

The main result of the discussion was an emphasis on the challenges of meeting with different mental models versus going into a collective practice. Having an internal rather than an external facilitator demands more emotional skills and more courage on the part of the facilitators. Facilitating process for friends and others in close relationship to the facilitator will cause changes in the relationship and therefore places special demands related to ethical awareness and responsibility. These situations need continuous renegotiations of the roles of the members and explanation of what is going on.

For the specific case in our group, this means that the difficulties experienced by staff performing as internal facilitators with regard to their fuzzy roles are understandable. There was a need to discuss or negotiate the role of the facilitator within the group. The demand for transparency and exposure of possible bias on the part of the internal facilitator are important challenges, while the facilitator should be aware of the opportunities available for moving 'in and out' and the possibilities and risks of *facipulation*. The possibilities of the latter, as in-between progressive facilitation and manipulation, are that the participation and motivation of the group can be utilised positively, if a sense of direction is clear to the facilitator.

2. Learning as a process

The question discussed here was primarily to do with whether the facilitator should always attempt to draw out the learning for the group. If so, how should he/she do it? How far should he/she go? And which level of learning should be aimed for?

These are difficult questions, and the answers depend on the facilitators' experience, where the process starts and how hard the facilitator pushes it forward. It would be important to provide appropriate environment and tools (such as an 'uh huh' journal). It would be necessary to use or start a dialogue. A good way of modelling the process can be by giving examples like telling stories. Also use of silence and posing questions can be good help for the process. How far the facilitator should go in this process depends on a series of conditions: how experienced the group is, how it has developed regarding openness, how dynamic it is, and how skilled the facilitator is. Furthermore, there should be awareness that the group work in itself will influence the learning process. The learning can happen as better insight, as meta learning or as epistemic learning (Salner 1986).

3. Legitimacy of interdisciplinary thinking in university education

The discussion here was based on questions of whether interdisciplinary thinking was needed, or not, in natural science education. What would it cost and at what cost would we have it? Should we abandon disciplinarity in order to embrace interdisciplinarity? And should our work be always interdisciplinary?

From the discussion, interdisciplinary thinking was revealed as a necessity within the areas of Health, Environmental Studies, and Commerce. Similar to the debate of pure versus applied science, a concern was pointed out that interdisciplinary thinking would dilute specialist knowledge, which might cost personal careers for people. We should not abandon disciplines, but encourage developing the capacity to think about complex problems from different disciplinary perspectives. Problem-based learning was presented as a good vehicle for achieving.

4. Change: incremental versus total overhaul

The supporting questions for this discussion were whether we should be happy with small incremental changes rather than large scale redesigns and whether there was an optional size for groups and organizations.

We found that the level of change required was very context specific and dependant on the problem. Therefore, we needed to find out:

> *What is the problem? What are the stakes?*
>
> *What are the drivers? What are the barriers?*

For example, a small change in one context can be a major change in another. A goal of getting people into the learning curve can become, what change people can contemplate and what change do they want.

There are many creative ways or options to work with groups of different sizes. There are more than just standard models, thus no final formula can be offered for creating change in the work of a facilitator.

Finally, there were also questions around the theme of university research. These concerned the pull between research versus teaching in the professional life of academics and the tension between academic rigour versus action in the work of action researchers. These questions were not adequately discussed at the workshop.

Discussion

The practice of agriculture and natural resource management is widely recognised as a human activity characterised by uncertainty and complexity. The forms of specialist knowledge in the previous era have been found to be insufficient to address the questions of uncertainty in this era of sustainability. The importance of providing tools for a systemic understanding in the education of would-be problem solvers in agriculture has often been highlighted

(Bawden and Busch 1989, Lieblein et al 2000, Wals and Bawden 2000, Sriskandarajah et al 2000). Drane (1999) went on to say that by not preparing the student to deal with uncertain knowledge we were limiting their development and impoverishing them as human beings and citizens.

If interdisciplinarity is the bringing together of distinctive components of two or more disciplines in order to create new knowledge that would not be possible otherwise, then interdisciplinary education is one way in which university graduates can be better prepared for dealing with the challenges of complexity and uncertainty. Problem-oriented project-organised learning is one approach available to implement interdisciplinary education at university level. However, the inclusion of just one or two units designed to introduce the methods in the early part of the curriculum without any integrating units in later years, will not lead to improvement in the situation or to the institutionalisation of interdisciplinarity.

Conventional universities are characterised by a predominantly disciplinary environment. In general, this environment drives academics towards excellence and competition through specialisation and disciplinary depth rather than towards interdisciplinary co-operation. People engaged in interdisciplinary education have to overcome not only institutional barriers and the attitude of their colleagues, but at times also the resistance of students who are concerned about the possibility of specialist knowledge being compromised through interdisciplinary considerations (Leth et al 2002).

At the organisational level, the most common situation in a university grouping, where success and self-interest of the individual are accepted and also rewarded, is in contrast with many other types of organisations (Drane 1999). The generation of interdisciplinary knowledge through collaborative research and, likewise, the creation of innovative course units through co-operation across disciplinary and departmental barriers calls for an organisational culture of team work between academics, better understanding of each other and trust. In an environment of everyone working for the organisation and its common vision, it would be recognised that individuals might act on the basis of self-interest but the internal culture will ensure that the effects of that are minimal. This culture is what the MOP group has been aspiring for as an organisation.

The creation of learners as reflective practitioners call for the facilitators of such learning to be good role models of reflective practice themselves. Within our group, collective reflection on our teaching practice is undertaken regularly on a semester basis in order to improve our course offerings. A formal opportunity exists for individual reflection as an annual exercise of staff development required by the university. Making deep reflection as an integral part of an academic's life, as called for by Drane (1999), would help create vigilantly self-critical practitioners and, through implication, also more competent graduates. The academy, for its part in cultivating interdisciplinary education, must 'never forget that a vibrant community of scholars – just like a thriving ecosystem – nurtures specialists and generalists, diversity and interconnections' (Nissani 1997).

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Using action research in the financial planning process of developing a new franchise system

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Franchising is the fastest growing method of doing business. In Malaysia in particular, the government has been aggressively promoting franchising since the early 1990s, yet there is little academic research to guide industry practices. Thus, this research investigated the problem: *How and why can financial planning carried out by a potential franchisor assist the establishment of a Malaysian franchise system?* Initial research found three main issues: gaps in the literature about the research problem; the distinctiveness of Malaysia's franchise industry; and the size and growth of franchising in developed countries and in Malaysia.

A review of the literature provided a preliminary conceptual framework in which seven research categories were developed to guide data collection and analysis: revenue forecasting; fixed and variable costs; accrual and cash items; funding proportion plan; monitoring the financial plans; integration of business planning and financial planning; and financial planning in the franchise disclosure documents. The research project was carried out in two stages. Stage one was exploratory research and consisted of convergent interviewing to refine and confirm the research topic. Ten convergent interviews were undertaken and divided into two phases – five each in Malaysia and Australia. Stage two of the study was an action research project. Three main action research cycles, using two-mini action cycles for each main cycle, were conducted with three new franchise systems seeking to register with the Registrar of Franchise Malaysia. At the end of stage two, the researcher presented the findings of the action research project at a National Franchise Workshop.

The *findings* of the research indicated that financial planning for a new franchise system is both feasible and achievable. In particular, the research identified that five elements of business and financial planning were used in revenue forecasting for product sales and fees, relating to research category one. For the second category, the findings confirmed that six elements of financial planning were used to identify fixed costs and variable costs. The third category, focusing on the process of distinguishing accrual and cash items in the financial planning for a new franchise system, found that four elements of financial planning were able to distinguish each of the accrual and cash items. Next, research category four found that the two essential elements of financial planning, used to measure the level of cash efficiency and to plan the funding proportion of a new franchise system, were cash flow projection and financing (capital). Then, research category five, investigating the elements used in monitoring the financial plan of a new franchise system, found four elements were used for this purpose. Category six, investigating the integration of business planning with financial planning in the process of developing a new franchise system, found seventeen elements of business planning and financial planning integrated the process. Results for category seven, indicated there were twenty-five elements of franchise disclosure documents in the development of a new franchise system.

Two new conceptual frameworks of business and financial planning were produced as a result of the data collected and the analysis was used to revise the preliminary conceptual framework developed from the literature. These two frameworks are the main contributions of the study – they will be useful for understanding the financial planning of new franchise systems in Malaysia and other developing countries. The Ministry of Entrepreneur Development Malaysia has adopted the first practical framework as a comprehensive guide to be used in developing a new franchise system in their Franchise Development Program. The second, more ideal framework was produced based on the advice of the policy workgroup in the action research project. This framework incorporates the ideas of academics towards the comprehensive process of developing a new franchise system that could be used in the future.

In summary, the thesis has implications for policy, practice, and methodology. It has produced guidelines for franchise evaluation by the Registrar of Franchise Malaysia which may also be used to equip franchise legislation in developing and developed countries by providing: a platform for comprehensive training; approved guidelines for franchise development; strategies for use in business decision making; a platform for existing franchise systems to improve their franchise business; and, a useful process (action research) to change practices in the workplace (organisation).

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ALARPM Management Committee
Profiles and Contact Details –

Below are brief profiles for two ALARPM Management Committee members who were not included in the last journal.

Shankar Sankaran – NSW, Australia

Shankar Sankaran is Director of Postgraduate Studies and Research at the Graduate College of Management and the Southern Cross Institute of Action Research (SCIAR). Shankar joined academia after thirty years of business and industry experience in Asia, the Middle East, South East Asia and Australia.

Shankar teaches in MBA programs conducted by Southern Cross University in Australia, New Zealand, Malaysia, Singapore, Papua New Guinea and China. He also supervises doctoral students doing PhD and DBA degrees in management. Shankar is on the Editorial Board of the online journal *Action Research International* and is a 'key researcher' of the College of Action Research at Southern Cross University.

Shankar has presented papers at international conferences in the areas of project management, automation, information technology, quality and action research. He is one of the editors of a book titled ' Effective Change Management using Action Learning and Action Research ' published recently by the Southern Cross University Press. He has conducted workshops in action learning and project management and has been involved in conducting large group interventions. Shankar also works with organisations to develop their managers using 'action learning'.

Shankar holds a Bachelor of Science, Engineering and Information Technology, a Master of Systems Engineering and a Doctoral Degree in Business and Management. His doctoral research was an action research study of management learning conducted in Singapore.

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Susan Weil – Northhampton, United Kingdom

Susan Weil is Professor of Social and Organisational Learning and Director of the SOLAR Centre. Before coming to UCN, she was at the Office for Public Management as Head of Higher Education and Fellow in Organisational Learning, where she led leadership, management and inter-organisational development initiatives across the public sector. Prior to this, she was at the Royal Society of Arts as Associate Director of Higher Education for Capability, where she worked with Professor John Stephenson, Professor Charles Handy, and others to stimulate innovation at all levels within universities. Before this, she was at the University of London, with the Centre for Higher Education Studies and the Centre for Staff Development in Higher Education. From this base, she continued her previous work in initiating innovations in inter-professional and inter-organisational learning in the Voluntary Sector and Local Government.

She completed her PhD at University of London on social and organisational learning needs in universities, as revealed through the life story narratives of 'non-traditional students'. She was elected Chair of the Society for Research into Higher Education from 1990-1992 and from 1992-1994 she was co-Chair of the International Consortium on Experiential Learning, which she helped to found in 1989. She has worked as a strategic dialogue partner and consultant to numerous chief executives across the UK, and other senior people, especially across the public sector, and to 'whole system' initiatives.

Susan has directed a wide range of research projects at SOLAR. She has served as Independent Education Advisor to the London Region National Health Service Executive, from 1996-present. In 1994 the University of Wolverhampton awarded her a Fellowship for her innovative contributions to student centred learning and institutional development. Her research, scholarship and consultancy have resulted in numerous books, chapters, development and training materials and research articles for academic journals.

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Networking

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

Southern Cross Institute of Action Research

– Southern Cross University, NSW

SCIAR is based at Southern Cross University in New South Wales, Australia. However, it consists of an international network of experienced Action Researchers who collaborate in research and consultancy projects in a wide variety of areas. In fact the primary reason the Institute was started was to bring together the vast expertise in Action Research that exists worldwide and coordinate it in addressing organisational and community problems.

SCIAR is governed by a Board of Advisors, key area leaders, liaison committee and a Director. It is wholly funded from its research and consultancy activities.

SCIAR is involved in:

Research: Undertaking commissioned and publicly funded research.

Consultancy: Our network of Action Researchers has vast consultancy experience in a wide range of public and private sector organisations, and communities.

Publications: **SCIAR** produces books, monographs and collections of papers published by its members. **SCIAR** writers are regular contributors to Action Research International, which is produced on-line.

Networking: **SCIAR** and its members contribute to ARLIST and ACTLIST, which are email discussion lists. To find out more about these discussion lists you can visit www.scu.edu.au/schools/gcm/ar/arhome.html

Action Research Education: Through its network, participation in 'Action Research on Line' is available. This program is a 14 week online program that teaches the fundamentals of Action Research and provides access to a wide range of resources in the area. Credit towards a Master's degree may be obtained if required.

Conferences: We hope to see you at one of our regular workshops and conferences.

Or would you like to undertake a Master's or PhD in Action Research? We offer expert supervisors to meet your supervision needs through the Action Research College at Southern Cross University.

SCIAR-L

If you like you can join the **SCIAR** email list – **SCIAR-L,** send an email to listproc@scu.edu.au, containing the message subscribe SCIAR-L<first name last name>.

This way you can find out more about **SCIAR** and participate in the discussions with international experts in Action Research and related topics. Or you can just 'listen in'.

The Australasian Facilitators' Network
– is usually what you want it to be!

The Australasian Facilitators' Network (AFN) is a loose association of Australians and New Zealanders who have an interest in the area of facilitation. AFN is usually what you want it to be.

This network of people usually link through the AFN list serve.

Joining instructions for this list are:

To: listproc@scu.edu.au

Subscribe AFN-L (Your Name)

IAP2 – International Association of Public Participation
– The Australasian Chapter

The Australasian Chapter of IAP2 is a local network and a link for practitioners with about 40 members in Australia and New Zealand. Although their executive committee is Sydney based, they have groups starting up in Brisbane and Perth.

IAP2 Tools

IAP2 has developed several tools for use by members. These include:

- Core Values of Public Participation
- Code of Ethics for practitioners
- IAP2 Spectrum of Public Participation

IAP2 Training

IAP2 now offers a Certificate Training Course in Public Participation. The 5 One-Day Modules are:

1. The IAP2 Foundations of Public Participation
2. Designing Effective Public Participation Programs
3. Effective Communication for Public Participation
4. Small group Techniques and Tools for Public Participation
5. Large group Techniques and Tools for Public Participation

IAP2 History and Mission

IAP2 was founded in 1990 to promote the values and best practices associated with involving the public in decisions which affect their lives. IAP2 has grown from 300 members in 1992 to more than 1,000 in 2001 in 23 countries.

IAP2 is an association of members who seek to promote and improve the practice of public participation in relation to individuals, governments, institutions, and other entities that affect the public interest in nations throughout the world. IAP2 carries out its mission by organizing and conducting activities to:

- serve the learning needs of members through events, publications, and communication technology;
- advocate for public participation throughout the world;
- promote a results-oriented research agenda and use research to support educational and advocacy goals;
- provide technical assistance to improve public participation.

IAP2 Structure

Board of Directors

A 15-member volunteer Board of Directors is elected at-large by the membership.

International Office

IAP2's international office is located in Alexandria, Virginia and includes an Executive Director. Administrator and support staff.

Chapters

16 chapters provide speakers, training, and networking through regular meetings, workshops and newsletters. There is no additional charge for chapter membership.

Committees

Committees support IAP2s work in such areas as the annual conference, board member nominations, chapter development, publications, and international activities.

Contact Information

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Noticeboard

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

ALARPM 6th & PAR 10th World Congresses
First announcement –

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- Leader practices
- Special stream for upcoming researchers

Hit the drums and let the organising committee know that you are coming to Africa.

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Action Research
– Announcing a "new" journal by SAGE Publications

SAGE Publications are launching a new journal entitled Action Research edited by Peter Reason, University of Bath, UK and Hilary Bradbury, Case Western Reserve University, USA. Action Research is a new, quarterly peer-reviewed journal offering a forum for participative, action-oriented inquiry. It aims to more firmly establish the legitimacy of action research in academia, and to forge links between academics and the various communities of action research practice. Coverage will include development, management, healthcare, education, social work and psychology; specific group interests, such as gender, race, sustainable development; and other cross-disciplinary interests that do not fit well within disciplinary journals.

The journal will be thoroughly international bringing together contributions by scholars and practitioners in developing countries of the South as well as the industrialised countries of the North.

Debbie Cock is currently producing a Call for Papers so if you are interested in publishing in this exciting new journal please contact Debbie.

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Journals Marketing Manager
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Concepts and Transformation
– International Journal of Action Research and Organisational Renewal

Concepts and Transformation centres on the notion that organisational, regional and other forms of social developments should be understood as multi-dimensional processes and viewed from a broad socio-ecological and societal perspective.

Concepts and Transformation is problem driven and focuses on the dialogical relationship between theory and practice, on the mutuality of knowledge and action, research and development.

Concepts and Transformation is a refereed journal and appears three times a year. Each issue includes illustrations of the practice of action oriented research, articles of a conceptual and theoretical nature pertaining to the focus of the journal as well as discussions on the changing world of work and book reviews.

Concepts and Transformation is edited by Richard Ennals, Werner Fricke and Øyvind Pålshaugen.

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Effective change management using action learning and action research

Book review by Chad Perry –

Sankaran, S., Dick, B., Passfield, R., & Swepson, P., (eds) 2001. *Effective Change Management using Action Learning and Action Research*, Southern Cross University Press: Lismore.

Essentially, action research is a tool for groups in organisations and communities to improve their work practice, and action learning is a tool for learning within groups. This excellent book takes a very comprehensive approach to these two tools. Firstly, it addresses both action research and learning. It distinguishes between them while noting their commonalities. Secondly, it goes beyond these two tools and relates them to others such as action science, reflective practice and systems thinking. It even includes a discussion of grounded theory, personal construct theory and critical theory. Yet it does not treat them as mere tools, because it also deals with the scientific paradigms that lie behind them. Finally, it takes action research and action learning beyond the United Kingdom and the United States where they began, to real-world applications in Australia, China, Israel, New Zealand, Singapore and Thailand.

Its comprehensiveness is only one of the reasons why this book is ideal for students and for practitioners alike. It is clearly and simply written, and keeps the jargon that sometimes clogs up other treatments of the tools to a minimum. Its many contributors ensure that readers get a range of ideas, from the 'elders' of action research in Australia like Ortrun Zuber-Skerritt and Bob Dick (who write the first two scene-setting chapters), through to consultants and developing PhD scholars. It goes from theories in the first part to application case studies in the fourth part, and all this value comes at a reasonable price for a book of its type!

The book's four parts are each looked after by one of the four editors. Part 1, about concepts, deftly places action research and action learning within its various theoretical backgrounds. This part also has a chapter about how action research can be made to work in different cultures – a thought provoking coverage of a difficult issue. Part 2 is about the frameworks that some very experienced action researchers/learners use in their practice. This part is a fitting follow-on to part 1.

Parts 3 and 4 are more nitty-gritty. Part 3 describes how techniques such as learning logs, critical incidents and even photographs can be used. Part 4 has more detailed stories of application. The case stories within are not limited to those by process consultants, who usually report on action research and action learning projects, but also includes stories by line managers who run the projects. There was honesty and intelligence in the stories of both these parts.

The case stories add meat to the more general bones in earlier parts of the book. Because it has so many contributors and four editors, the links between the parts/course and the chapters/plates in the meal of this book are sometimes difficult to pick up. But, overall, it is very nutritious and tasty meal.

All in all, I thought this was a remarkably deep, wide, eclectic and accessible book about its topic. I strongly recommend it to newcomers and to more established people in the action research and action learning field.

The book sells for AUD$49.95 (ex GST) through
Southern Cross University Press
PO Box 157, Lismore NSW 2480 Australia
Phone: 61 (0)2 6620 3284 / Fax: 61 (0)2 6620 3282

Email: scupress@scu.edu.au

Guidelines for contributors

Contributions to this journal

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

We welcome contributions in the form of:

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

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

Contributed case study monographs

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

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

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

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

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

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

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

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

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

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

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

ALAR Journal subscription

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

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

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❑ ***Yes*** ❑ ***No***

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

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