Action Learning and Action Research
Songlines through Interviews

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These songlines ‘sing’ into history the personal story of Action Learning and Research (ALAR) by an ALAR founder, Ortrun Zuber-Skerritt. Revealed through a collection of interviews conducted by scholars from six countries, these engaging, informative, intimate stories record her ALAR journey to document history and, more importantly, to help develop skills and innovation in workplace/community and lifelong learning for everyone, including the disadvantaged and poorest.

Reviewers comments:

This book is a must read for action researchers of all stripes and experience levels. Ortrun Zuber-Skerritt, a principal architect of ALAR who has pushed the boundaries of AR conceptually and methodologically, has now created a unique book built out of orchestrated interviews that provide us with much insight into who she is, why and how to learn from her, and invitation to collaborate in further developing our practice for the benefit of everyone.

Davydd Greenwood, PhD, Goldwin Smith Professor of Anthropology, Cornell University, USA.

Interlinking interviews with personal and professional reflection make this book a welcome contribution, not only to ALAR but also to the wider development of personal narrative research and autoethnography. The methodology will inspire readers to be both creative and honest in their approach to their own studies.

Morwenna Griffths, PhD, Professor and Chair of Classroom Learning, School of Education, Edinburg University, UK.

I’m excited by the PIP model (Preamble–Interview–Postscript) that Ortrun introduces to structure her ALAR story in this book. It’s particularly useful in African countries for making public indigenous knowledge that is traditionally transferred by means of story telling.

Ansu Erasmus, PhD, Professor and Senior Director, Higher Education Development and Services, Tshwane University of Technology, Pretoria, South Africa.

In this innovative self-ethnographic account, Ortrun shares the experiences that are sources of her wisdom in relation to ALAR. Those who yearn for more control of their work situations, their lives and their environment in general, will be empowered by the personal learning that her ‘songlines’ convey.

Shirley Grundy, PhD, Professor and Dean of the Faculty of Education, University of Hong Kong.
Action Learning and Action Research

*Songlines through Interviews*

*By*

Otrun Zuber-Skerritt and Associates

Bob Dick, Mary Farquhar, Susan Hall, Thomas Kallith, Stephan Laske, Jim Murphy, Doris Santos and Richard Teare
To Carsten
my son, learning partner and confidant –
the voice of my most treasured songlines
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I came across action research, as I suspect many do, as a practitioner. I was looking for a research approach that could be effective in unpredictable and changeable situations. Action research worked so well in those situations, and so respectfully of people, that I made it my research approach of choice. Some years later, I encountered action learning.

It was immediately apparent to me how similar it was to action research. Both solve problems. They engage their users with real issues in organizations and other social systems, seeking resolution of those issues. Both pursue understanding and action. In both, the people who experience the problems are involved in defining and solving the problems and implementing the solutions.

My further exploration revealed that, despite their similarities, action learning and action research were mostly separate. Action learning had its own provenance, its own traditions, its own originators, its own literature. So did action research. Action learning clearly owes its beginnings to Reg Revans. The beginnings of action research are a little more contentious, though most writers acknowledge the contribution of John Dewey, who in turn influenced such people as Kurt Lewin. Perhaps these different origins explain why the two literatures of action learning and action research were so separate. At that time there was not even much cross-referencing between the two literatures.

Certainly, there are differences between the two. Action learning has been used so far mostly at work – in industry and commerce and the public sector. Action research is more widely used, especially in education and in rural and regional development. Those differences are an unnecessary limitation, however. I’ve found action learning valuable in corporate settings, where I’ve used it for cultural change and leadership development. I’ve also had successful outcomes from using it in regional development for revitalizing provincial centres, and in the tertiary classroom for helping people learn the skills of change agency.

There are other differences too. Action research tends to pay more attention to the academic values of rigour and publication, though action learning does not always lack these. The usual setting for action learning is a small group. Action research also is used there. However, it is also used by sole practitioners, in organisations and other social settings, and across whole communities and industries.
But suppose that you were to compare some of the varieties of action research to each other. For instance you might compare soft systems methodology with its emphasis on systems concepts, to appreciative inquiry with its exclusively strength-based approach. I’d be surprised if you didn’t find the differences substantial. You might even wonder how they came to be treated as part of the same family.

In comparison, action learning and mainstream action research seem almost to be twins. If you were to observe a group of people using either action learning or action research for problem solving, you might have difficulty telling which it was that they were using.

I imagine that other people have come across action learning and action research and noted the obvious similarities. Whether or not they have, Ortrun Zuber-Skerritt didn’t just notice the similarities. She acted on her realisation.

For instance Ortrun was instrumental in initiating a series of world congresses on action learning and action research. She was influential in the establishment of an organisation, ALARA (formerly ALARPM) that supports the use and diffusion of action learning and action research in combination. She christened the combined action learning/action research process ‘ALAR’.

In addition she has championed the use of ALAR in many settings and many nations. The two traditions of action learning and action research are now more often merged, for which Ortrun can take much of the credit. This book itself is an example of her willingness to blaze new trails, and to try to do so in ways that are useful for others. This book extends the use of interview as a vehicle for scholarship and learning.

As you read the interviews in this book you will learn much about ALAR, action learning, action research, and some of their close relatives. You will discover how timely they are as research approaches in a world becoming more turbulent and more needful of both action and understanding. I suspect you will come to appreciate interviews as an interesting medium for exploring the interaction between a person and a field of endeavour.

You will also become more familiar with Ortrun as an entrepreneur and enthusiast who has introduced many to ALAR and helped them to use it wisely and effectively. You will discover that, like ALAR, she addresses both action and understanding in her work and teaching. I think you will find her enthusiasm infectious.

Action learning and action research (particularly action research) have several varieties. Some future historian may set out to plot the further development of
action learning and action research. When that is done, I expect that there will be further varieties; and I expect that one of those varieties will be ALAR.

ALAR is the offspring of the marriage of action learning and action research, with Ortrun Zuber-Skerritt as the midwife. It is valuable, then, that Ortrun has made available in this volume her first hand accounts of the birth of ALAR, the contributions of its two parents action learning and action research, and her own role at the birth.

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ABOUT THE AUTHOR

Ortrun Zuber-Skerritt is Director of OZI (Ortrun Zuber International P/L) specializing in action learning and action research, qualitative research methods, leadership development programs, and postgraduate research supervision. She is also Adjunct Professor at Griffith University, Brisbane (Australia) and Professor Extraordinaire at the Tshwane University of Technology, Pretoria (South Africa). After her under- and postgraduate studies in Germany, she has lived in Australia for almost 40 years.

In her professional life she has actively pursued development of higher education, management education and professional and organization development, publishing extensively and nurturing a new generation of action research practitioners.

She has accepted many invitations to conduct programs, seminars and workshops in universities and business schools around the world. Countries include Australia, New Zealand, Hong Kong, South Africa, Colombia, Germany, Austria, the Netherlands, Sweden and England.

After retirement from academia in 1997, she has continued to research, teach, coach and write. Her love of learning and helping others to learn, understand and be able to act responsively inspires her to continue creating knowledge and insight with others to improve the lives of many in this world of continuous change.

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ACKNOWLEDGEMENTS

A number of colleagues and other special people have contributed generously to this book. Having invited me to participate in interviews, my associates then collaborated supportively as we converted interview transcripts to chapters: Mary Farquhar, Susan Hall, Thomas Kalliath, Stephan Laske, Jim Murphy, Doris Santos and Richard Teare.

From the Action Learning and Action Research Association (ALARA), in particular Bob Dick, Wilma Schouten and Susan Goff offered constructive criticism of the first draft of the book.

My copy editor, Maureen Todhunter, substantially enhanced the quality of this book through her questioning, inspiration and inimitable way with words.

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Peter de Liefde at Sense publishers responded efficiently and has been a pleasure to work with.

I express deep gratitude to all of these people. My songlines in this book – the ideas, stories, reflections given birth on these pages – would not have been born without their encouragement, care and open-hearted contributions.

Ortrun Zuber-Skerritt

8 April 2009
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Mary Farquhar, PhD, is Professor of Asian Studies at Griffith University in Brisbane, Australia. She is a member of the Australian Research Council's College of Experts, a former President of the Chinese Studies Association of Australia and the founding director of the Australia-wide China Law Network. Her publications include the international award-winning book, *Children's Literature in China: From Lu Xun to Mao Zedong* (1999). Her recent work on Chinese cinema includes a book (with Chris Berry) *China Onscreen: Cinema and Nation* (2006), a journal special issue (2008) and a book (with Yingjin Zhang) on Chinese film stars (in press, Routledge). Email: m.farquhar@griffith.edu.au

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**Richard Teare**, PhD, is President of the Global University for Lifelong Learning (GULL). GULL’s co-founders are Christians and passionate about the pressing global need to provide development opportunities for people of all faiths, traditions and cultures and especially for the low paid, disadvantaged groups and the poorest. Richard has been passionately committed to work and community-based learning since the mid-1990s. During the past ten years he has helped to create learning and development applications for a wide variety of organizations in various parts of the world. Prior to this, he held professorships at four UK universities (Bournemouth, Surrey, Oxford Brookes, Derby). In 1988 he founded and then edited for 20 years, the *International Journal of Contemporary Hospitality Management*. He is now the Managing Editor of *Worldwide Hospitality and Tourism Themes* – both published by Emerald Group. His academic publications include 20 co-authored and edited textbooks on aspects of service management, marketing and organizational learning. Email: richard@gullonline.org
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<tr>
<td>AL</td>
<td>Action Learning</td>
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<td>AR</td>
<td>Action Research</td>
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<tr>
<td>ALAR</td>
<td>Action Learning and Action Research</td>
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<td>ALARA</td>
<td>Action Learning and Action Research Association (since 2008; formerly called ALARPM)</td>
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<td>ALARPM</td>
<td>Action Learning, Action Research and Process Management Association</td>
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<td>ALD</td>
<td>Academic Leadership Development</td>
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<td>ASD</td>
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<td>AVI</td>
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<td>EQ</td>
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<td>Non-governmental Organization</td>
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<td>NGT</td>
<td>Nominal Group Technique</td>
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CHAPTER 1

INTRODUCTION

Early in the 21st century, we see strong growth in the quest for practical and conceptual knowledge to inform understanding of how to live responsibly, mindful of the people and the world around us. There is much to motivate this quest. Unprecedented changes at local, national and international levels signify a global environment transforming rapidly. Unforeseen consequences of climate change, economic upheaval, environmental destruction, large-scale migration and concerns for personal, community and national security render social upheaval and dislocation for ever more people around the world. Traditional approaches to learning and research are inadequate for today’s knowledge needs to solve unprecedented problems.

Yet hope, pragmatism, positive action and the successful results of that action also feature in this environment. Today people across the globe are looking beyond the missions, policies and strategies of governments, to seek sources of wisdom and inspiration from leaders. The autobiographical writings of US president Barack Obama (2004; 2006) are outstanding examples. People are looking for development of new leaders who have the capacity to innovate, inspire and lead wisely through collaboration, in workplaces, organizations and communities. They are coming to see that their ideas and actions need to be informed not just by existing knowledge that draws from lessons of the past but also by new knowledge that is most relevant to present circumstances and to the people experiencing them. It is the type of knowledge produced through Action Learning and Action Research (ALAR), to which we turn our attention in this book.

Findings of the 2008 Bradley Report on higher education in Australia (Bradley et al. 2008: xi) apply not just to Australia but to most countries:

There is an international consensus that the reach, quality and performance of a nation's higher education system will be key determinants of its economic and social progress. If we are to maintain our high standard of living, underpinned by a robust democracy and a civil and just society, we need an outstanding, internationally competitive higher education system.

As the world becomes more interconnected and global markets for skills and innovation develop even further, it will be crucial for Australia to have enough highly skilled people able to adapt to the uncertainties of a rapidly changing future. Higher education will clearly be a major contributor to the development of a skilled workforce but, as never before, we must address the rights of all citizens to share in its benefits. Higher education will continue to be a cornerstone of our legal, economic, social and cultural institutions and it lies at the heart of Australia's research and innovation system.
CHAPTER 1

This book aims to contribute to the development of skills and innovation in the workplace and of lifelong learning for everyone, including the disadvantaged and poorest. This book is about Action Learning and Action Research (ALAR), a methodology for change, problem solving and positive development in situations involving people, as I explain in more detail below and throughout this book. Unlike traditional top-down approaches to learning and research, ALAR moves from micro towards macro level as its users seek to identify and address difficulties and produce practical and conceptual knowledge by reflecting on their experience.

Because ALAR is a response to situations involving groups of people, much of the discussion in this book concerns the workplace. Nevertheless, I explain the relevance of these lessons for other group contexts so that learning from the book contributes to the development of skills and innovation in any context where situational knowledge production is useful. Lessons from this book are helpful for anyone interested in learning how to address group-oriented concerns, whether such people have opportunities for advanced education through institutions of higher learning or are among the most marginalized in society. Many of the practical and theoretical insights presented here are illustrated in models and figures. I believe the learning from this book will empower readers to ably approach the task of knowledge creation to help solve their own group problems and contribute to the expansive project of lifelong learning.

Discussions in this book present a more comprehensive picture of ALAR than single studies usually reveal, offering my personal story of the origin, history, philosophy, methodology, values, theories, models, processes and practices of ALAR through a collection of interview transcripts. This is my response to numerous requests from colleagues, friends and other interested people who have approached me asking that as one of the initial ‘movers and shakers’ of ALAR I record my experiences in one comprehensive volume. Here I draw from roughly 30 years of experience to document my story. I offer this story in response to interview questions about my ALAR involvement, as a source for learning about this methodology, and effectively as a personal history of the development of ALAR.

Just as the content of this book is distinctive, so too is its format. In true ALAR style, I have sought to present my ALAR story in an innovative way that promotes dialogue with readers, and so will advance discussion of ideas and learning through a new genre: multi-interview narrative. This introductory chapter and the concluding chapter (Chapter 10) envelope eight chapters that are edited transcriptions of interviews in which action researchers asked specific questions about my perspectives, the reasons/motives behind my work and what I have learned in the process. These interviews therefore take readers right to the heart of what most interests people outside (and inside) ALAR. Perhaps the book will stimulate your own reflections on your ability to effect change in your workplace, organization or community, through collaborative ALAR, discussion and reflection. The form of this volume may also introduce you to a new way of
recording and presenting your research and writing that stimulates further
discussion, as I seek to achieve with this interview collection.

Apart from Chapter 9 (where I was the interviewer of another ALAR activist), all of
the interview chapters were conducted by people interested in and/or actively
working with ALAR processes, who wanted to hear more about my ideas,
experiences and insights. At the time of interviewing, all worked in various fields as
academics, consultants and leaders in organizations in the private and public sectors.
That these people were from across the world – Australia, Singapore, New Zealand,
Colombia, Austria and the UK – suggests the wide geographic reach of interest in
ALAR as a methodology for learning and research. ALAR has particular relevance
for a variety of learning and study areas in the human and social sciences.

I have prepared this book from my viewpoint as an ALAR practitioner after over
30 years of, effectively, living ALAR. My engagement with ALAR began and
developed in scholarship and professional experiences of studying, conducting,
teaching and reflecting on the philosophy and methodology of action research
through processes of both traditional and action learning. However, as this book
reveals, the approaches, values and understandings that ALAR fosters flow across
from scholarship and professional life into personal philosophy and all of life.
These interviews therefore unfold my experience of becoming and being an action
learner and action researcher, developing local and global networks of like-minded
people, and of contributing to the development of ALAR as a field. Here we come
to appreciate the nature of ALAR in its parallel simplicity and complexity, as the
interviews illustrate how ALAR is more – and more powerful – than simply a
‗methodology‘. Because it is a way to understand the human life experience, in
some ways ALAR is, or becomes, a way of living for those who use it.

Both action learning and action research are located in the human and social sciences,
rather than in the natural sciences. The point I made immediately above provides the
key reason why. As a methodology, ALAR is not for dealing with organic or
inorganic matter. ALAR is for dealing with sentient human beings, particularly
groups of people, organizations, communities or societies, whose characteristics,
ideas, strategies and behaviour are complex and difficult or impossible to predict. A
central concern in the social sciences is the poverty of understanding about what
underpins and influences human actions for sustaining or improving practice. These
underpinnings/influences are, importantly, paradigms, philosophies, values and
Weltanschauungen (worldviews) that are discussed in this book.

I have found ALAR very useful in my work and my multiple roles as teacher,
supervisor, mentor, coach, workshop facilitator and organizer of seminars,
symposia and conferences. The utility of ALAR has naturally flowed, and I have
consciously and unconsciously absorbed it, into all parts of my life. This is why I
have tried constantly to advance and promote ALAR, not just as a methodology for
learning and research but also as a broadly useful approach to organizational
problem solving, to professional development and leadership development. Following ALAR principles, I have continued to initiate and pursue collaborative action and publish what I have learned in order to guide and inspire others and further cultivate ALAR learning and research. Some observers have labelled me an ALAR activist and ALAR advocate. Some have described me and my work as inextricable in the genesis of action learning and action research as these concepts have evolved separately through earlier forms into the present ALAR construction. These views suggest to me that my ALAR story can offer valuable insights for those who are interested in ALAR as an approach to learning, research, professional and leadership development, improving conditions in group situations and indeed for lifelong learning.

In this volume I have revised, shortened and creatively woven together the content of selected interviews, or parts of them, into ‘my story of ALAR’ as ‘songlines through interviews’. Selection from these conversations brings together in one volume the key strands of thought, experience and learning that demonstrate the evolution of ALAR for me as a leading proponent. This book therefore presents aspects of my personal story – my ALAR journey – that have been of most interest to my interviewers/colleagues, and from which readers are likely to gain insight and understanding of ALAR.

The idea of using the metaphor ‘songlines’ for the sub-title of this book was born in a discussion with Stephan Laske and his wife Katja in September 2008 when we reflected on a doctoral course at the University of Innsbruck (Chapter 8 refers). We talked about Chatwin’s (1987) book and his travels across the length and breadth of Australia, seeking to find the truth about the songs of Aboriginals and to unravel the mysteries of their stories. Chatwin (2005) described their songlines as invisible pathways that criss-cross Australia, ancient tracks that connect communities and boundaries or lines. On these tracks Aboriginals passed their songs, which revealed the creation of the land and the secrets of its past.

This book, too, seeks to trace the origin, growth and development of action learning and action research and to pass it on to others. Both AL and AR had their own history and literature and were then integrated into a new form of life: ALAR. I develop the analogy of ALAR as songlines through this book as my personal story helps to uncover the invisible pathways of AL and AR that criss-cross the work of a growing community of learners and researchers. These pathways are new ‘knowledge’ tracks that connect individuals, communities, ideas and actions. On these tracks ALAR practitioners are now passing their songs of knowledge creation, continuously developing sources of learning – and addressing new problems – for ourselves and others.

To indicate to readers how the story in this book progresses through the chosen interviews, each interview chapter begins with a ‘preamble’ that explains the context of the interview discussion and how it came about. Each chapter ends with
a ‘postscript’ explaining my reflections on the interview, the action that it inspired, and broader understanding derived through hindsight. This is in true ALAR style of reflecting on what one has experienced and recording these reflections for further action and further reflection. There are also questions as ‘discussion starters’ at the end of each chapter to encourage readers’ active engagement with the content, relating these ideas to their own life and work situation and ideally contributing further to this ALAR conversation through publication. Later in this Introduction chapter and in my reflections in the Conclusion chapter, I explain the PIP model that I used to structure the interview chapters.

The style of this book therefore demonstrates a new way for ALAR practitioners to report and publish their R&D (research and development) activities and reflections on these activities. I have found personal narrative in the conversational style of interviews a useful way of responding to our need as action researchers to make the researcher’s own experience a topic of investigation in its own right, particularly for the insights it encourages into the research experience. As with all innovations, here readers may usefully identify limitations or enabling features of this style, which they can then address or develop further in their own publications.

I believe that a particular strength of this book is that it demonstrably practices what it preaches at every turn. This is clear from the values, worldviews and epistemology that have guided the words on these pages to the collaborative action and personal reflection that have guided these words into their distinctive narrative form. Here I have used processes of action learning and reflection in an attempt to ease conceptualization and model building, to illustrate how ALAR thought and practice result in innovative and informative communication, and so contribute to the development of knowledge of ALAR in theory and practice.

As the President of ALARA (the ALAR Association) explained (Susan Goff’s email to me, 27 September 2008):

The reflections on your ontology and your life as an action researcher could be really and truly engaging and timely as a narrative that many younger researchers are looking for, to know how to live AR rather than navigate pathways for little pieces of it.

From here I structure this introductory chapter around four questions:

1. **What** are the purpose, aims and features of the book?
2. **Why** is the book important and worthy of publishing and reading (significance)?
3. **Who** are the readers? Who will be interested in/motivated towards reading it and will benefit from reading it?
4. **How** are the aims achieved? What are the contents and structure of the book?
Purpose, Aims and Features

The purpose of this book is to discuss action learning and action research as linked, integrated concepts. There are many definitions of action learning and action research, so first let us clarify these concepts as the basis for further discussion. ‘Action’ is almost an all-embracing term. In this book its temporal scope includes past, present and future. It refers to something done in the past that has affected our present insight, learning and knowledge bases, and enables and compels us to plan our future action accordingly.

Thus ‘Action Learning’ means learning from and through action or concrete experience, as well as taking action as a result of this learning. Similarly, ‘Action Research’ is a cyclical iterative process of action and reflection on and in action. Through the careful thought of collaborative reflection we conceptualize and generalize what happened (action). We can then investigate whether our conceptions hold ground in new situations; that is, we try to find confirming and disconfirming evidence to inform our assessment and further reflection. The main difference between ‘Action Learning’ (AL) and ‘Action Research’ (AR) is the same as that between learning and research generally. Both include active learning, searching, problem solving and systematic enquiry. However, Action Research is more systematic, rigorous, scrutinizable, verifiable, and always made public (in oral or published written/electronic forms).

In discussing action learning and action research as linked, integrated concepts, I reveal how they emerged and merged together, why they are important in the present time of unprecedented change, and how they can be applied in educational and workplace situations, as well as for the development of lifelong learning. My ALAR story in this book is about people working together to improve their situation and personal and professional lives through mutual support, collaborative problem solving and ALAR methods and processes. I illustrate my learning through discussion of my own experiences and extensive encounters with others who use ALAR.

As this book makes clear, action learning and action research are proven methods for responding effectively to shared challenges in times of rapid change (Pigott-Irvine and Bartlett 2008; Greenwood and Levin 2007; Dick 2004, 2006, in press; Zuber-Skerritt 1996a). Given the nature of my interests and experiences, this book focuses on ALAR for improving learning and teaching and for professional development of leaders, management, staff, organizations, communities, and other individuals and groups inside and outside the workplace. The literature concerning ALAR is now rapidly expanding with handbooks, texts and case studies on either action learning or action research; only a few treat the two methodologies as a related and integrated whole. This book explains why and how they can be combined efficaciously.
ALAR is a methodology that generally focuses on addressing issues, concerns and problems. The approach to problem solving in this book does not follow a remedial, deficit model in the style of ‘command and control’ bureaucracies. ALAR is a positive approach to change management in self-organizing systems, as for example, developed in the literature on ‘Appreciative Inquiry’ (AI) (Cooperrider et al. 2008; Anderson et al. 2008; Barrett and Fry 2005). In fact, the term ALAR in this book could frequently be replaced by the American concept of AI, because the two are based on similar philosophical assumptions, theories and modelling of experiential learning. However I have intentionally retained the ALAR label, largely because ALAR’s Australian/UK origins have prefigured the developments, events and extended global networks that I discuss here with the ALAR terminology.

Identifying ALAR as a positive approach to change management is not to conceive of ALAR as simply a recipe for problem solving at a superficial level. Here we conceive of ALAR as emancipatory enquiry into ways of positively and fundamentally changing a social situation or an organization. We treat ALAR and apply it as a way to empower the people concerned to take responsibility for their own destiny in self-directed learning and leadership.

A distinctive and necessary feature of this book is that I present discussion mostly in first-person voice. First, I reveal my ALAR story through the fabric of my personal lived experiences. It is essential to me that I present the direct testimony of my personal narrative through my own voice as the author/interviewee. I want to claim agency for the action I take and what I write or claim in interviews about my action. Second, writing in first-person voice is true to the spirit of ALAR. We are involved and participating in the research with others and take joint responsibility for the results and outcomes. We do not pretend to be ‘outside researchers’, ‘objective’ observers and detached scientists, and instead acknowledge our place as ‘personal scientists’ who are more interested in studying and finding our group’s (community’s or organization’s) specific solutions, principles and values, than producing general laws through quantitative measurement and analysis.

This stance on author’s voice is demonstrated well by ALAR veteran Bob Dick, who even in his literature reviews on action research (2004; 2006; in press) uses first-person active voice to acknowledge personal responsibility for his choices, evaluation and judgement of the literature. He does not pretend to be the objective expert whom others should not question or doubt, and he explicitly uses the first person singular to make a statement: ‘This is my view of the literature; others might think differently’. I have the same rationale for speaking frankly about myself using the first-person voice in this book. I recognize that I am personally and professionally responsible for what I say about ALAR in my own work (and in the work of others) and for my comments in the preambles and postscripts. Others may have different views. This is my perspective based on my world views, scholarship and experience.
Discussing my choice to speak frankly about myself in these pages, using first-person voice, brings me to speak about an aspect of this book that has continued to discomfort me throughout its preparation. It concerns the place of my ego in this story of ALAR and thus in these published pages. I hold humility in highest regard and hope that I exercise it by natural instinct in the course of my everyday existence. Preparing this volume, however, presents a scenario rather different from my everyday existence. In this book I have chosen to present my personal story of ALAR, which begs discussion of my learning not just through failure and personal shortcomings (as I discuss in Chapter 4 and elsewhere) but also through my professional success and personal strengths. Because this is my story of ALAR, my answers to interview questions need to be self-referential. This is impossible for me to avoid, as my discussion below of this writing’s autoethnography genre explains.

My decision to prepare this interview collection telling my ALAR story, to offer my personal reflections, and consequently to develop personal theory, is not from my initiative. It is my carefully considered response to requests and invitations from colleagues at home and abroad that I make this contribution about my work to the ALAR field. I have done so in the belief that this book will help to explain, validate and promote ALAR as an evolutionary approach to knowledge creation, problem solving, and leadership and professional development. I have done so with the best intention to meet requests for my ALAR story as well as I could, and with hope that I have made a useful contribution to recording ALAR history in these pages.

Significance

Content

Beyond the historical import of this ALAR story, the book creatively addresses a significant gap in the literature through a new narrative form. The personal story I reveal in interviews and personal reflections on professional practice provides a comprehensive account of action learning and action research (ALAR) that other books on particular aspects of AL and AR have not delivered. These personal stories enable readers to inform their own actions in a feeling and embodied way, learning from the personal experiences of an ALAR exponent rather than from abstractions as traditional academic texts present. There are many books on action learning (e.g., Dotlich and Noel 1998; Mumford 1997; Marquardt 1999; Pedler 1997, 2008) and on action research (e.g., Reason and Bradbury 2006; 2008; Greenwood and Levin 2007). Most books on action research concern just one field, mainly within:

- Education (Altrichter et al. 2008; Dana and Yendol-Hoppey 2008; McNiff and Whitehead 2006; Whitehead and McNiff 2006; Dadds 1995; O’Hanlon 1996)
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- Health sciences (Ghaye 2008; Koch and Kralik 2006; Winter and Munn-Giddings 2001)
- Organization change and development (Berg and Eikland 2008; Coghlan and Brannick 2005; Coghlan and Rashford 2006; Zuber-Skerritt 1996a)
- Community development (Reeb 2006) or
- Methodology (McIntyre 2008; Denzin and Lincoln 2006; Denzin et al. 2008; Bryant and Charmaz 2007; Somekh 2006; Somekh and Lewin 2005), etc.

The theories, principles and examples discussed in this book mainly concern the fields of higher education and professional development, including the professional development of academics, managers, leaders and organizations. Because these theories and principles are generic they can easily be applied to other fields.

In relation to the AL and AR literatures, what makes this book unique is its exploration of both AL and AR as complementary approaches. The book proceeds from recognizing the synchronicity and partnership between these two approaches; shared methodologies and difference only in the extent to which these are applied, as the definitions I provide above identify. My responses to interview questions draw from my conceptual base and personal perspective. Both of these are shaped by my knowledge of the ALAR literature and my years of personal and professional experience of ALAR, applying this methodology to a range of fields and national contexts. This book therefore opens the way for others to present their unique stories through the frame of interviews, drawing on their own personal construct system, professional/life experience and personal wisdom.

**Presentation Style**

Preparing this collection of interviews as a comprehensive account of action learning and action research has evolved into development of a new style for publishing research and writing, based on reflection on R&D activities. I identify this style as a new strand – the PIP model, introduced below – within the genre of autoethnography. This style has come about through thought, reading, reflection, collaboration and constructive advice from critical friends, again in true ALAR style. I began with the idea of using multiple interviews within the tradition of personal narratives. For ALAR this tradition is:

- Socratic in approach – learning through questioning insight and making tacit knowledge explicit;
- Praxis oriented and holistic – integrating theory and practice, research and development;
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- Action oriented – learning by doing, learning from mistakes, and sharing ‘ignorance’ as well as ‘know how’ with critical friends;
- Accessible to a wide readership, because it uses conversational language that is unpretentious (jargon free), honest, simple (but not simplistic), to the point, and easy to understand;
- Fostering reflective practice;
- Reflecting the spirit of action learning and action research.

In preparing this volume I continued to think carefully about its purpose. My initial thoughts on collecting interviews for a comprehensive and personal ALAR story were inspired by recognizing two aspects of writing: 1) the possibilities of writing as narrative – telling a story, my ALAR story – rather than writing to pursue inquiry; and 2) the value for readers of learning from the written accounts of others’ experiences. The co-mingling of these ideas brought me to the emerging genre of autoethnography.

Autoethnography

Autoethnography derives from the Greek: autos = self; ethnos = people, culture; and graphein = writing. Generally it refers to the author’s study and writing of their own culture, values, research and writing. David Hayano (1979) is credited as the originator of ‘autoethnography’ through his anthropological writings, but authors in different study fields have since reconstructed the term with meanings aligned to the nuances of their own writings. I am guided by Ellis and Bochner (2000: 739):

Autoethnography is an autobiographical genre of writing and research that displays multiple layers of consciousness, connecting the personal to the cultural. Back and forth autoethnographers gaze, first through an ethnographic wide-angle lens, focusing outward on social and cultural aspects of their personal experience; then, they look inward, exposing a vulnerable self that is moved by and may move through, refract, and resist cultural interpretations.

Clearly there are many mutual resonances between autoethnography and ALAR. As Ellis explains in a later work with Bochner (2006: 433), ‘Autoethnography shows struggle, passion, embodied life and the collaborative creation of sense-making… It wants the reader to care, to feel, to empathize, and to do something, to act.’ I believe that my story as told through the interviews in this volume, within the paradigm and conceptual base of ALAR, performs as Ellis explains here. Indeed, in telling my ALAR story through interviews and reflections on them, I develop a new strand – story telling through interview – within the autoethnography genre. I call this new strand ‘self-ethnography through interview’, enveloped in preamble and postscript.
The PIP Model

Each chapter of the book opens with a preamble (P) setting out the background and conduct of the interview (I), and closes with a postscript (P) revealing my additional comments and reflections after the event. This new PIP model is foreshadowed here in Figure 1.1 that locates this new genre strand in the qualitative research paradigm, particularly within ethnography, and embedded within that genre in the specific form of autoethnography. The PIP (Preamble – Interview – Postscript) strategy provides a coherent structure for each chapter and for the whole book as a collection of the chapters. My reflections in Chapter 10 further explain the PIP model.

![Figure 1.1: The PIP model – a new form of self-ethnography](image)

This book therefore provides a new bridge from ALAR into autoethnography. Since ALAR shares much perceptual space with autoethnography, in some ways it is surprising that we who work in ALAR have not already embraced this form of writing for our own storytelling. I believe that this book’s bridging across from ALAR to autoethnography and contribution of a new ‘interview’ strand to the genre will open the way for further exploration of ALAR writings as self-ethnography through interviews (PIP model).

A useful source of guidance in developing this new interview strand within the autoethnography genre has been readers’ online comments about one of the interviews in this volume (Jim Murphy’s interview in Chapter 3), which first met public gaze through the Internet. The online comments suggest that this book will interest new readers beyond the academics, teachers and students who are the
CHAPTER 1

target readership of most books on this topic; it will also interest practitioners, consultants and people who prefer ‘other ways of reporting’ research and may then be stimulated to read more of the literature on ALAR. These comments suggest the value of the bridge this book begins to establish between ALAR and autoethnography. They also indicate the book’s potential to bring about some very constructive connections on both sides.

Support for publishing interviews

Approaching this book as a new strand of ‘interviews’ within the autoethnography genre enabled me to produce a more engaging, informative, ‘intimate’ text, communicating in a conversational style. The online comments below point to the value of interviews in the new genre, as I explain further in my reflections in Chapter 10. Readers (cited below) appreciate the accessibility this form provides, its capacity as a catalyst for others in the field to explore new ways of presenting their work to the public, and its contribution to recording ALAR history through a personal lens. For example:

- I think the conversation reveals aspects of Ortrun’s life and work that illuminate our understanding of her thinking. I have read a fair bit of what Ortrun has written, and feel that I ‘know her better’ after reading this interview ... I’m strongly into trying to encourage other ways of reporting research, especially ways of making it accessible to folk who find orthodox research reports intimidating, and I think that this paper fits well into ‘other ways of reporting’. (Waikato Polytechnic, New Zealand)

- ... this paper has been a catalyst for much thought, continuing thinking, challenges and hopefully actions in each of our practices in the future ... for that, thank you ... Great stuff. (Catalyst of Change Consulting and Training, Brisbane, Australia)

- Ortrun’s career and person demonstrate the interdisciplinary nature of the field and the article in my opinion subtly places AL/AR in context as an emerging research paradigm that continuously links theory and practice. (Concordia University, Canada)

- Zuber-Skerritt’s New Directions in Action Research has a prominent place in my bookshelf. I liked the interview because it is probably another missing link in the history of AR, which I shall try to reconstruct. (University of Groningen, Netherlands)

- I think the interview with Ortrun is very interesting. It has certainly influenced what I will be reading in the coming months! For those who are not familiar with key people and ideas this kind of interview is potentially helpful. (University of Hull, UK)

(Source: http://www.scu.edu.au/schools/gcm/ar/ari/p-jmurphy00.html)
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As these comments suggest, this volume’s collection-of-interviews style is ideally placed to extend the mode of reporting research, inside and outside the ALAR realms. The volume aims to provide just such a stimulus. It also aims to provide through its ‘interviews’ style a background for contextualizing both practitioners’ ALAR stories and stories of ALAR as a field and as an international network of action learners/researchers. An example of the international network is the combined ALARA (Action Learning and Action Research Association) and PAR (Participative Action Research) Network. ALARA and PAR members come from diverse but cross-fertilizing backgrounds – education, higher education, business, industry, government, communities and non-profit organizations – and meet locally, nationally, and in world congresses every two to three years (see Table 4.1).

Improving interview presentation

Responding to constructive comments from the on-line readers mentioned above has enabled me to provide a fuller picture of my work and career in the field of ALAR. Some constructive comments have specifically helped to shape how I have presented the interview chapters and enveloped them in Introduction and Conclusion chapters to construct a more comprehensive narrative through the collection. For example:

- I would have welcomed more specific information on Zuber-Skerritt's model of learning, teaching and professional development using action research in higher education, and I suspect others who work in higher education might share my desire to be given a thicker description of what it looks like in practice. (University of Toronto, Canada)

- I have been intrigued by the format of this paper and initially ... wondered how feasible it was to edit an interview at all ... I suggest ... a transcript followed by a critical analysis and reflection followed by a response from the interviewee. (Royal Melbourne Institute of Technology, Australia)

- I find myself wanting more from this person. I have the sense that there is more depth, more experience, more something that I could get from Ortrun ... Add some of your perspectives taking liberty as the interviewer/researcher/writer to expand from your knowledge of her life/work and/or from your own in theory or practice on what Ortrun is saying ... A reflection on the reflection? In other words there is quite a bit more here than meets the eye and I will re-read, reflect, and look up the references provided. (Concordia University, Canada)

- What I missed was a kind of short overview of the theoretical and epistemological notions in her work ... (University of Groningen, Netherlands)

- I agree with those who suggest that a bibliography ... would be useful to those who want to pursue Ortrun's work further ... I think it would be useful if you included (perhaps as a preamble or postscript) a little more
detail about how you conducted this interview. ... I also wanted to know how Ortrun has changed her own practice as an educator as a result of her interest in action research. (Waikato Polytechnic, New Zealand)

(Source: http://www.scu.edu.au/schools/gcm/ar/ari/p-jmurphy00.html)

Publication of a collection of interviews using the PIP model reveals, I hope, the breadth and depth of my personal theories, conceptual frameworks, processes and practices of ALAR that readers hope to find in such a collection. Indeed, having different interviewers broadens the spectrum of concerns and curiosities and enriches the range of interests, experiences, insights, wonderings and inclinations inspiring the interview questions. This scope delivered by eight different interviews cannot possibly be achieved in a single interview, or from a single interviewer, as some of the online comments quoted above rightly suggest. These comments underscore the utility of a book that presents parts of carefully selected interviews cohesively to set down clearly my epistemology and world views. The interviews are also vehicles for putting forward in a contextualized way my conceptual models of learning, teaching and professional and leadership development, which all have practical utility in the workplace.

Readership

The interdisciplinary field of ALAR, and the new genre strand illustrated in the PIP model for presenting research and writing through self-ethnographic interviews, are of interest and importance to a broad band of readers. Especially these will be people who want to 1) improve circumstances in their workplace, organization or community through projects or programs of change, development and improvement of practice; 2) seek new ways of knowing and learning as professionals and/or leaders of groups, organizations or communities; and 3) learn about and become familiar with alternative forms of presenting narrative in publication.

Academic theoretical books on action research (e.g., Reason and Bradbury 2006, 2008; Stringer 2007; Carr and Kemmis 1986; Zuber-Skerritt 1992a, 1996b) are directed mainly to students, researchers and academics. Practical guides and manuals on action learning aim to reach practitioners (e.g., McGill and Brockbank 2004; Pedler 1997, 2008; Mumford 1997). This book integrates theory with practice and action learning with action research. It has been designed and prepared for a wide readership who will find its content easy to understand and informative. It can be used by academics teaching a course about ALAR to undergraduate or postgraduate students in higher education institutions, as well as by ALAR practitioners as facilitators and agents of change/development in industry, government or their communities. In any case this book is instructive for anyone who wants to improve practice and simultaneously to learn, understand and come to know the principles and theories guiding – or emerging from – these practices.
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Already this book can make a valuable response to the quest for producing knowledge to cope with and anticipate rapid change in today’s complex situations, as noted at the start of this chapter. However this book will be increasingly relevant in the future. Problem solving that responds effectively to unprecedented changes now under way across the globe highlights the need for a paradigm shift away from rote learning (for exams or specific tasks) to action learning in the workplace/organization/community (experiential, transformational and lifelong). It moves away from traditional, logic-deductive, theory-driven academic research in higher education and other social sciences (where data are manipulated to fit a theoretical stance). It moves towards participative action research where personnel at all levels of an organization are invited and encouraged to think, plan, innovate, observe and reflect while working together, solving a practical problem and creating new understanding and theory grounded in experience and collected data, to produce a widely accepted, sustainable outcome.

Discussion in this book demonstrates in conversation and by example how this paradigm shift can be achieved. Because the conceptual framework is fundamental for such a shift, this book is likely to retain relevance, durability and thus readership. ALAR methodology is appropriate for achieving improvement and incremental development in many fields, particularly in crisis situations and times of unprecedented change. The form I have used in this book to report and explain ALAR is new. Nevertheless, it is well suited to communicate ideas, develop understanding and generate learning from action and research because it enables practitioners and researchers to express themselves clearly and constructively through the embodied voice of personal narrative. ALAR can be learnt and developed through experience and collaborative problem solving and discussion in the organizational context. In presenting my story of ALAR, this book provides practical theory and explains how to follow the path of ALAR to create knowledge most relevant to present circumstances and to the people experiencing them.

Contents and Structure of the Book

How are the aims of this book achieved? The volume is structured along, and follows the process and original, historical spiral of cycles of, action research (plan – act – observe – reflect). This chapter outlines the rationale and plan of the book. The interviews in Chapters 2 to 9 constitute the action and implementation of the plan. The preamble and postscript in each of those chapters relate to my observation; and the conclusions in Chapter 10 are based on my reflections on the interviews and on my and my associates’ learning and development.

The interviews in Chapters 2 to 9 are linked and woven together as a cohesive book that proceeds from the history and development of ALAR as a field and network (Part 1) to applications and examples (Part 2) in management education and organization development, professional and leadership development in higher
education, and a global self-directional system for lifelong learning. Layout of this book is illustrated in Figure 1.2.
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The following is a brief summary of each chapter.

**Chapter 2: Developing the Field of ALAR: Action Learning and Action Research (Interviewer: Mary Farquhar)**

Presents information and insights into the background of ALARPM (Action Learning, Action Research and Process Management) not only as a field but also as a worldwide network association, thus facilitating understanding of the evolution and nature of these three concepts. My responses reflect my personal perspective, informed by both life experience and a theoretical framework that conceives of ALARPM first as a philosophy, a theory of learning and a methodology, and second as a method and technique.

**Chapter 3: Developing as an Action Researcher (Interviewer: Jim Murphy)**

Provides the reader with a better understanding of me as the person who does this work. It ranges over my personal and professional origins, career development, prominent influences and partnerships, the barriers I faced, and my views on universities as institutions of learning and research. It includes my reflection on my achievements as well as my thoughts on the future of AL and AR. The website comments noted earlier point to reader interest in having access to this information.

**Chapter 4: Developing Networks and Values (Interviewer: Tomas Kalliath)**

Expands on the origins and growth of the ALARPM Association from 1989 to the present. It then tells the story of a leadership development program for women academics in six universities of technology in South Africa and their action research projects. I had invited three stakeholders to present their comments on the impact of ALAR at the individual, group and institutional levels when they participated in an ALARPM World Congress in South Africa in 2003.

**Chapter 5: Management Education and Organization Development (Interviewer: Tomas Kalliath)**

Focuses on the use of ALAR in graduate management development in New Zealand. I explain how, why and when to use ALAR, and how organizations can benefit from ALAR methodologies. We also discuss the issues of management education through ALAR methodologies that foster lifelong learning, generic problem-solving skills, creative and innovative thinking, as well as systemic and critical thinking, networking and collaborative inquiry and decision making in crises and unprecedented situations. These learner-centred methodologies and processes are particularly useful in management education and organization development in these times of rapid change and global knowledge explosion.
Chapter 6: Professional and Leadership Development in Higher Education
(Interviewer: Doris Santos)

Presents parts of my theoretical framework for workplace ALAR with models and various examples of professional and leadership development programs in higher education in Australia and South Africa. Consistent with its emphasis on PAR (Participative Action Research), this chapter includes my eulogy to recently deceased Orlando Fals Borda who was a globally preeminent PAR advocate and activist, with discussion of his outstanding contributions to the field of PAR.

Chapter 7: Supervising the Design of a Qualitative Research Project
(Interviewer: Susan Hall)

Deals with postgraduate supervision of qualitative research in general and of an action research thesis in particular, including project design. It presents several process models that have proved useful to academics and postgraduate students in the social sciences in various institutions of higher education and in many countries. The concepts of ALAR are explained in Revans’ (2006) terms of learning from ‘sharing ignorance’ and being ‘humble’ as a researcher.

Chapter 8: Songlines of a PhD Course
(Interviewer: Stephan Laske)

Presents a case study that identifies the salient features of a successful PhD course on qualitative research methods and thesis writing in the social and economic sciences. The course itself uses ALAR methodology. The Faculty Dean responsible for quality assurance in teaching and learning conducted the interview with me as the course leader, after I had taught the course and revised it continuously every year since 1995. We both reflected on the course structure, its educational features and philosophical background, and on the students’ learning outcomes based on feedback data from their course evaluation and written comments.

Chapter 9: GULL – Global University for Lifelong Learning: An Interview with the President
(Interviewer: Ortrun Zuber-Skerritt)

Consists of the only interview in this book that was conducted by myself, namely with Richard Teare, the President of the newly established Global University for Lifelong Learning (GULL) that uses ALAR as its main methodology to help the disadvantaged and the poorest achieve their goals and gradually improve their life situation. Discussion concerns the mission, system, strategy and applications of GULL, and how we can work towards achieving a more democratic, equitable, learner-centred educational system of developing lifelong learning for everyone on a large scale, worldwide, through action learning.
Chapter 10: Conclusions

Draws conclusions from the above chapters based on my reflections on the interviews and meta-reflections on those reflections summarized in an overall model of experiencing and developing workplace AL and AR. In this chapter I locate my story within what I conceive to be the bigger picture of our Creator’s great universal story and action. The chapter summarizes my conceptual framework, my pathway and journey from formal educational goal settings via alternative methods of ALAR to more informal, learner-centred, self-directed and equitable processes of ALAR for life-long learning and professional development at work. Finally, I present the new genre of interviews in models of self-ethnography, that is, a systematic description of life, work, cultural background and personal values.

Overall, the book argues for a methodology, culture and system of ALAR in which people share their knowledge and ‘know-how’, which are unique to each group or organization, as well their ‘ignorance’, failures, mistakes and concerns. In fact, I argue across this volume that we learn more from our tribulations than from our success, especially through active participation in discussions, cooperative capacity building and collaborative activities with critical friends. By intentionally and systematically creating a positive climate and collaborative culture, practitioners and leaders can deal with change and elicit constructs and tacit knowledge of the participants in their projects or programs.

Apart from Chapters 1 and 10, cross-references among chapters are provided mostly in preambles and postscripts, but where there are also links to other chapters included in the interview text, these are indicated in square brackets [...].

REFERENCES

CHAPTER 1


Part 1: Development of Action Learning and Action Research as a Field and Network

This part consists of three chapters: Chapter 2 on developing the field of ALAR; Chapter 3 on developing as an action researcher; and Chapter 4 on developing networks and values.
CHAPTER 2

DEVELOPING THE FIELD OF ALAR: ACTION LEARNING AND ACTION RESEARCH

Preamble

This chapter is an edited version of an interview conducted by Mary Farquhar. It focuses on three areas in which I have been personally involved and that are useful in understanding how the field of Action Learning and Action Research (ALAR) has developed over a 70-year period, and especially in the past two decades. The three areas are:

1. The evolution and nature of ALAR in relation to my own development;
2. My role in institutionalizing ALAR as a legitimate and highly useful research and development approach; and
3. My views on work that is required to further develop the field.

Accordingly, the chapter is structured under three headings:

1. Personal understanding and development;
2. Institutionalization; and
3. The state of the field.

The concepts and traditions of Action Learning and Action Research (ALAR) have been developed independently, and conjointly through the international association called Action Learning, Action Research and Process Management (ALARPM), to make valuable contributions to learning and research. Yet this history is little known. Here we take an action research approach to uncover some of this history. We have adopted an interview format to reveal some of the personal dimensions involved in the origin and history of ALARPM, making fresh insights accessible to a wider readership through this book.

Mary Farquhar jointly initiated with me the ‘First International Symposium on Action Research in Higher Education, Industry and Government’ in Brisbane in 1989. She has since collaborated with me on many projects. The interview was inspired by a conversation between us that highlighted the utility of this type of oral history for recording the development of ALARPM, about which almost nothing had been recorded to that time. In 2008 the name of the ALARPM Association was changed to ALARA (Action Learning and Action Research Association). Hence we now refer to the field of ALAR. For historical accuracy in this interview we discuss ALARPM, since this was the former acronym of the Association.
CHAPTER 2

Interview by Mary Farquhar

Personal understanding and development

MF: Let’s treat this interview as a personal reflective piece on Action Learning and Action Research or in short, ALAR. What do you think ALAR is? Academically, is it a field, a discipline, a method, or a state of mind?

OZS: I don’t like to think only academically when it comes to the notion of action learning and action research because I consider these concepts to be an integrated framework. If pushed, I say it is now an academic field, not a discipline, but a multi- or interdisciplinary field. Yes, it is also a method for learning and development, i.e., personal, professional and organization development and transformation. Is it a state of mind? Yes, and more than that. I believe it affects the whole person largely through one’s perspective of self: mind, soul, spirituality, ethics, values and worldviews, and hence, one’s actual behaviour.

MF: How did you become interested in ALAR?

OZS: I became interested when I was in a work situation at Griffith University where I was working in academic staff development with colleagues, most of whom believed in a paradigm of learning and research that differed considerably from mine. These people were positivists in research and didacticians in higher education. My ideas and approach to learning, teaching and staff development were heuristic and totally out of kilter in this environment. My work was constantly attacked or ridiculed; I felt vulnerable most of the time.

For me this was a new and profoundly powerful Socratic experience since I knew intuitively that my philosophy had merit. I was alone professionally in this work situation, but deep inside I could not accept that majority views must be right, accepted or adhered to simply because of their majority status. I recognized that we should not leave a paradigm unchallenged simply because it is dominant. So I searched for like-minded colleagues and support, and I found them in what was then the School of Modern Asian Studies (now called Asian and International Studies). You were one of these colleagues, Mary, and others included Professors Colin Mackerras, Nick Knight, Bob Elson and Colin Brown.

MF: Who were key influences on the early development of your thinking about ALARP?

OZS: Apart from colleagues I’ve just mentioned at Griffith University during the 1980s, before that, in the 1970s, I was most influenced by scholars I met at conferences or whose work I had read, in particular Fred Emery, Alan Davies, and Alistair Crombie in the Centre for Continuing Education at the Australian National
University in Canberra. I was interested in their adult and workplace learning theories. In the 1980s, I was influenced by people working in the Deakin School of Education, such as Stephen Kemmis, Robin McTaggart, Rob Walker, Colin Henry and John Smyth. I was impressed and challenged by their critical action research in education and teacher development. These people and their thinking were the catalysts for the development of my work from then on.

MF: What about action learning?

OZS: Around the mid-1980s after I’d conducted many collaborative action research projects in higher education in Australia, people in the audiences during my tour of invited lectures in Sweden repeatedly mentioned Reg Revans. They said that I was thinking and arguing like him, but I had not met nor even heard of him. So in libraries in Stockholm and Gothenburg I found books and references in Swedish, Norwegian and German. Back in Australia, I managed to find some of his books in English, but most were out of print. It was satisfying for me to read about action learning because it confirmed the learning and teaching principles and strategies that I’d upheld despite derision from many of my colleagues.

MF: And how did you find Revans’ ideas?

OZS: I was impressed by his writings and we communicated through letters (his on the typewriter or handwritten!) for many years. I visited him in his home in Manchester in 1986 and he gave me many of his books, including those out of print. In 1989 I was very surprised to learn that Reg Revans’s philosophy had substantially influenced the work of the International Management Centres Association (IMCA), a professional society founded in 1964 with headquarters in Buckingham, UK. IMCA is the world’s first multinational business school that has been dedicated to action learning since 1982. The people of IMCA and I were impressed with Reg Revans’ ideas because we agreed with his philosophy which he skilfully expressed in very simple terms: L = P + Q. He maintained that programmed knowledge (P) is useful for our learning from experts (e.g., academics in lectures or books), but it is not sufficient. We also have to learn from asking ourselves fresh questions or from ‘questioning insight’ (Q). At school and university we mainly learn from P, but there are also many intelligent people who leave school early and become very successful in their careers as senior managers or CEOs, because they are good at learning from their experience. These people have welcomed Reg Revans’ ideas of action learning and IMCA’s strategy of facilitating action learning programs leading to higher degrees, including Masters and Doctoral dissertations.

MF: How does action learning relate to action research?
After my introduction to Revans’ work in the mid-1980s, over time I thought extensively about action learning, particularly in relation to my own approach to action research. In the late 1980s I came to recognize that the philosophy underpinning action learning was very similar to that of action research. So I set out to learn more about how it had been developed. I discovered that action learning had its origins in England with Reg Revans in the 1930s and 1940s. Reg was then a Professor of Management Studies at the University of Manchester, working with managers in coalmines who learnt with and from each other to improve working conditions and productivity. He summarized this work at the First World Congress on ALARPM in 1990, in his keynote address that I published as a book chapter and recorded in a video interview (Revans 1991; 2006). How is action learning different from action research? Action research includes action learning and more. Action research is more systematic, strategic and rigorous, always made public through presentations and publications. As with the difference between learning and research generally, both are about acquiring knowledge. But research pursues a more diligent, investigative inquiry that is evidence-based, and its purpose is also to create knowledge.

You’ve told us about the origins of action learning in England. What are the origins of action research?

The inspiration that gave birth to action research are very similar to those that compelled Reg Revans towards action learning in the UK. Action research originated in the 1930s, particularly with Kurt Lewin’s philosophy and methodology of finding ways to change or improve human and social conditions. He took his ideas and influence to the US after he emigrated from Berlin in 1933 via the UK in response to Hitler’s rise to power. He had a substantial influence on the Tavistock Institute in London, even after his death in 1947 (Neumann 2005). I think that Lewin’s concepts are best summarised in the *Action Research Planner* by Kemmis and McTaggart (1988).

Could you please summarize them for us?

Yes, I think the most effective way is through five overhead slides that I prepared precisely for this purpose in my teaching. These summarize in point form some key features of Kurt Lewin’s work on, and through, action research: (1) concepts of action research, (2) the ‘thematic concern’, (3) action research steps, (4) moments in action research and (5) the types of outcomes from action research. [These slides are shown in Tables 2.1-2.5.]
Table 2.1: Lewin’s concept of action research

1. Conceptually crucial are the ideas of group decision and commitment to improvement.
2. Those affected by planned changes have the primary responsibility for:
   - Deciding on courses of critically informed action that seem most likely to maximize improvement of practice; and
   - Evaluating the results of strategies tried out in practice.

Table 2.2: Thematic concern

- Action research is participatory, collaborative research that typically arises from the clarification of some concerns generally shared by a group.
- Participants describe their concerns, explore what others think, and probe to find what it might be possible to do.
- Through discussion they decide what is feasible to work on, i.e., a group project.
- The group identifies the project’s thematic concern.

Table 2.3: Action research steps

- Reconnaissance – initial reflection on your situation in light of thematic concern.
- Planning for improvement.
- Enacting the plan and observing how it works.
- Reflection – analyze, synthesize, interpret, explain, draw conclusions.

Table 2.4: The four moments of action research

- Planning critically informed action to improve what is already happening.
- Acting to implement the plan.
- Observing the effects of critically informed action in the context in which it occurs.
- Reflecting on these effects as a basis for further planning, critically informed action and so on, through a succession of cycles.
Table 2.5: Types of outcomes from action research

In action research we look for changes in three different aspects of individual work and the culture of groups:

1. Changes in the use of language and discourses – how people actually identify and describe their world and work.
2. Changes in activities and practices – what people are actually doing in their work and learning.
3. Changes in social relationships and organization – how people inter-relate and how their relationships are structured and organized within the organization.

MF: So have the traditions of action learning and action research developed separately from each other in England and America?

OZS: Yes. As with many great ideas and innovations, action learning and action research developed in parallel, from about the same time in the 1940s, inspired by similar social and economic concerns. Both were born in western contexts, and derive from western industrial and social experience. And both have had to struggle against entrenched western intellectual traditions. But they were developed quite independently of each other in different countries. Both were forgotten or at least set aside during and immediately after the Second World War, but both were revitalized from the late 1960s. Nevertheless people in the two camps had little communication with each other until 1990 with the first ALARPM World Congress that brought the separate strands together.

It’s interesting now to see how Revans and Lewin developed their ideas independently in response to the social and economic problems of their time. I think that we still confront social and economic problems, but now the scale of these problems is global and the problems have common elements around the world. With this, technological advancement has given more and more of us ready access to almost instant communication with people near and far, so that people globally now share problems that in earlier times were more localized.

MF: What did you find most difficult about ALAR when you started working in this area?

OZS: Ironically, what I needed to cope with, and what I found most difficult in my workplace was precisely what I found most difficult about ALAR. It was identifying, understanding, and then putting into practice the philosophy of ALAR. I was forced to do this because in academia in the 1970s and early 1980s I constantly had to justify the validity, usefulness and work relevance of my approach – action research – in theory and practice. I had no mentor and I didn’t understand the philosophical assumptions underlying the different paradigms that
influence people’s actions and reactions, and how they approach learning and research tasks. These philosophical shortcomings limited my ability to argue my case cogently and ultimately blocked my career development for almost a decade.

So from personal experience I consider it very important for academics, students, leaders and change agents who want to use action research to learn about and understand the deepest levels of inquiry: epistemology. I think this is especially so for postgraduates who usually have limited experience exploring epistemological issues and need what epistemological inquiry cultivates: the ability to argue persuasively. Postgraduates have to convince their examiners that their action research is valid and rigorous within the phenomenological paradigm.

MF: Can you explain your last point in more detail?

OZS: Epistemology is the branch of philosophy that deals with the nature and origin of knowledge. Epistemology asks questions that can force us to probe deeply into our consciousness and examine assumptions that are usually unrecognized, through questions like:

- What constitutes knowledge?
- How do we come to know?
- How do we learn?
- How is knowledge produced?

There are at least three kinds of knowledge: (1) propositional or theoretical knowledge which is taught traditionally in schools and universities; (2) practical knowledge taught mostly in institutions of technical and further education or polytechnics; and (3) existential knowledge which is the realm of action learning. Similarly, there are at least three kinds of learning: (1) theoretical learning (learning what); (2) practical learning (learning how to); and (3) existential, experiential learning (learning why). These kinds of knowledge and learning fundamentally shape our knowing, doing and being respectively.

MF: So what are the implications of epistemology for learning, teaching and development in practice?

OZS: I acknowledge that there are many academics in universities around the world whose teaching philosophy and practice are informed by theories of adult learning that encourage a learner-centred, problem-oriented approach. However from my observations of higher education institutions in many countries, conventional teaching philosophies and practices still predominate.

Conventionally, it is assumed that experts convey their knowledge to novices who acquire and accumulate that knowledge. You might have seen the caricature of the professor pouring a jug of information into the empty vessel, i.e., the student’s
head. In this view learning is thus perceived as a one-way transmission of information: input, process and output. Input is determined and prescribed arbitrarily by experts; output is usually measured in examinations; and the most successful method of passing exams is rote learning, no matter whether it leads to understanding (and retention beyond the exams) or not. However, in action learning we recognize that people, especially adults, do not start with a *tabula rasa* – a blank mind. They have already acquired knowledge, skills, opinions and values through life experience, upbringing, and religious, socio-historical and cultural influences, through reflection on their trials and errors as well as their achievements, and thus through their personal constructs of phenomena with which they are very familiar. We first try to explore these existing constructs and capabilities – the self as learner/researcher – and then build on them by asking probing and guiding questions. The answers must be generated by the learners themselves and link the learners’ new knowledge to their existing knowledge.

**MF:** And what are the implications of epistemology for research?

**OZS:** Similarly, in human and social research it’s traditionally assumed that only experts are capable of formulating a scientific hypothesis needed to pursue inquiry. They test this hypothesis by selecting and using pertinent variables, research methods, a convincingly large, representative sample of ‘subjects’ and control groups; and finally confirm or refute the hypothesis to produce knowledge. So in this approach, the researcher is perceived as an expert – an ‘outside’, ‘objective’ observer who studies his/her ‘subjects’ in controlled yet empirically valid situations, using ‘scientific’ methods and achieving ‘objective’, genuine and reliable results that can be generalized into objective knowledge, ‘fact’, argument and theory.

Action research proceeds from quite different epistemological premises. These recognize that knowledge is not created through objectively and systematically testing hypotheses but rather it is a product of people learning about learning: what it is and how to do it. In action research it is assumed that all people who seek to learn and are not mentally disabled are potentially ‘personal scientists’ (Kelly 1955; 1963). They are capable of creating knowledge on the basis of concrete experience by reflecting on this experience and formulating concepts and generalizations, then testing these concepts in new situations that provide new concrete experience and a new cycle of generating experiential knowledge. This is Kolb’s (1984) well-known experiential learning cycle. [See Figure 7.3 in Chapter 7.]

**MF:** How have action learning and action research influenced your career?

**OZS:** Once I recognized that understanding epistemology was not only useful but in fact essential for my work in university staff development, I furthered my study of the philosophy of science. I was influenced by certain paradigms and new
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traditions, such as the frankfurt school of critical theory, the deakin school of educational action research, action science by chris argyris and his associates in the us, and action theory by vygotsky, leontjev and his associates in russia and germany, as well as by personal construct theory put forward by george kelly in the uk and his followers world wide. this knowledge and thinking gave me the insights i needed for effective intellectual argument. i felt much more confident in my practice of university staff development, in my conference and seminar presentations, and in my writing. so i started publishing my work. when my papers were accepted for publication in internationally refereed journals, and my books were accepted by reputable publishers, such as pergamon press, kogan page and gower in the uk, i was finally promoted from lecturer to senior lecturer. i successfully applied for the position of associate professor in charge of staff development and organizational development at the university of queensland, and after two years, i was invited by southern cross university (nsw, australia) to take up the position of professor and director of research and postgraduate studies in the faculty of education, work and training.

so action research was instrumental in my career in two ways. it enabled me to respond convincingly to peer pressure that i prove my point, work harder and argue more convincingly. and since it was predominantly through my publications that i was eventually accepted and promoted in academia, i acknowledge what i’ve gained from action research in compelling me to publish my work. my phd thesis in the mid-1980s is said to be the first about action research in theory and practice in higher education. i’m told that my thesis laid the ground internationally for action research to be accepted as academic research and for many postgraduates across the world since then to follow my example by using action research for their own theses.

mf: do you think this has helped others?

ozs: yes, i do. i’m always very pleased when i hear from people in many parts of the world who acknowledge the usefulness of my work in their own learning, teaching, research and development. and i recognize that the educators whom i’ve taught in action research can have a multiplier effect through the students whom they teach. i feel this is reward for my own hard work against traditional scholarship in the 1970s and 1980s. it’s also proof to me that at times it can be not just legitimate, but in fact obligatory ethically, to challenge the dominant paradigm when our own judgment directs us to do this. our work together with people in other cultures, irrespective of their geological location, demonstrates this proposition.
Institutionalization

**MF:** Ortrun, I know that you and I conceptualized the first International Symposium on Action Research over discussion one night in 1988. How did this Symposium lead to the First World Congress on Action Learning, Action Research and Process Management (ALARPM)?

**OZS:** At the end of the Action Research Symposium, everyone present agreed that this event should be repeated on a larger scale, incorporating the other two related traditions: action learning and process management. I remember driving home from the venue with my colleagues who were at that time from Surrey University in the UK: Maureen Pope and Pam Denicolo. We were totally exhausted and Maureen wondered: ‘Why do we do this to ourselves? We could have had a holiday instead!’ The question continues to resonate with me. I know why I did it then and still do it now even though I am formally ‘retired’ from the University. It’s because I believe that ALARPM is making valuable contributions to the way more and more of us understand learning and research. I see that it contributes to education and other learning venues through active, self-reflective processes. This belief fuelled my desire to secure for ALARPM the institutional legitimacy and academic recognition that I believe it truly deserves. So I convened the First World Congress on ALARPM the following year, drawing on like-minded colleagues and their connections in industry, business, government and higher education.

**MF:** What were the major difficulties with organizing the First World Congress on ALARPM at Griffith University in Brisbane?

**OZS:** The biggest was funding; we had none.

**MF:** So how did you do it?

**OZS:** We – the Organizing Committee – became a true action learning group, using action learning to advance our own cause. We were ‘comrades in adversity’, as Reg Revans would say. We discussed our funding and other problems and solved them in highly creative and collaborative ways. For example, we divided our outgoing mail into equal batches for dispatch through our respective organizations. It was not the most efficient process, but since we had no conference funding, this was our only way. Ron Passfield, our treasurer, invented a brilliant system for bronze, silver and gold sponsorships. It was successful, and we were able to employ UNIQUEQUEST, the University of Queensland’s organizing body, as organizer for our Congress. We needed 110 delegates to break even. We actually had 360 who attended!

**MF:** How and when did action learning, action research and process management become ALARPM?
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OZS: It happened over time, between 1989 and 1992. As mentioned earlier, I was involved in action research for many years before I discovered action learning, which confirmed my previous theories and practice. I was involved in a special interest group called the Process Management Group (PMG) that met at least once a month at the Queensland Institute of Technology (now a university: QUT) and Griffith University. We discussed innovative methods for managing and facilitating processes of learning and development. This is process management. The participants in these PMG workshops were professionals from many sectors. We were all interested in learning from and with each other, discussing why and how to facilitate learning and ‘development’ (rather than teaching and ‘training’), and sharing the problems and difficulties in our actual practice.

MF: Does the Process Management Group still meet?

OZS: No, it no longer exists. It has been subsumed by the wider action learning and action research community that shares its aims and concerns. Consequently, our international association changed its name in 2008 from ALARPM to ALARA (Action Learning and Action Research Association). In the First World Congress we brought together for the first time:

- The three separately developed traditions of action learning, action research and process management; and
- Professionals from various sectors engaged in professional and organizational or community development through processes of ALARPM.

Most of these people were working in primary and secondary education, higher education, technical and further education, government research departments, training and development agencies, human resource management, consulting firms, church organizations or community groups. Others were owners of small and medium size businesses or consultants in large corporations.

MF: When was the ALARPM Association established?

OZS: At the Second World Congress in 1992, also in Brisbane, but this time at the University of Queensland. Ron Passfield was the first elected President of the Association and remained in this position for seven years. ALARPM or ALARA is now a worldwide movement. For example, at the Fourth World Congress in Cartagena (Colombia) there were over 1,800 delegates from 61 countries. At this event we combined ALARPM with the PAR (Participative Action Research) eighth national conference in the Americas. [The other ALARPM/PAR World Congresses are discussed in Chapters 3 and 4.]
MF: Even with this worldwide organization, do you think action learning and action research (ALAR) are accepted in mainstream management circles?

OZS: When you say ‘mainstream management circles’, do you mean management in the private sector or private business schools or graduate schools (or colleges) of management in universities?

MF: All of those.

OZS: Let me comment on each group in turn, since these responses are mixed. First, management circles in business and industry. In general and in my experience, these circles have long recognized and confirmed that processes of ALAR are not only appropriate, but are a very effective method for long-term professional development and are a means for responding rapidly to organizational challenges that require fast action, change or transformation. So that’s the first circle, the private, commercial sector.

The second circle, private business schools, is generally more responsive to business and industry needs than university departments because these schools rely on full-fee paying students. Private business schools have been more open than public teaching institutions to new methodologies such as ALAR. A good example is the International Management Centres Association (IMCA) that I mentioned earlier. It’s a private business school and a professional membership organization dedicated to improving personal and organizational performance via action learning. My colleague, Faith Howell, and I conducted research into the effectiveness of MBA and Doctoral programs in the Pacific region and the relevance of these programs to industry over a five-year period (Zuber-Skerritt and Howell 1993). We found that both the individual associates who had participated in these IMCA programs and their sponsors (i.e., the CEO or top management in their organizations) appreciated the IMCA philosophy and processes of action learning. They were enthusiastic about the learning outcomes for themselves and for their organizations. But they also would have liked these degrees accredited by universities or state bodies.

However, many teaching academics in graduate schools of management in universities, the third circle, are still reluctant to accept process-oriented approaches to learning and research. They insist on covering a certain curriculum content and on teaching the theory of the field. Being university academics in a relatively new field – management – they feel they are under pressure to demonstrate that they are as ‘scientific’ and grounded in theory – as ‘academic’ – as their colleagues in other disciplines. So they are in a difficult situation. They experience the old battle between the two competing paradigms in the social sciences. Some of them remain secure in the traditional positivist paradigm of knowledge transfer from expert to novice; others venture into the new paradigm of
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creating ‘grounded theory’ based on data and reflection on experience. [This is discussed further with Doris Santos in Chapter 6.]

MF: So how do you see ALARPM surviving and being accepted in private business schools and maybe even more widely in universities?

OZS: I think this legitimization is already under way. Primarily it’s because of the strengths of ALAR that are evident at this historical moment. But it is also hastened by the market. As public funding for higher education diminishes, even the most conservative educational institutions will come to realize that their traditional philosophy of learning is outdated (at least in the social and human sciences) and requires revision or perhaps complete overhaul premised on quite different assumptions about knowledge and learning. Traditional learning philosophies are largely irrelevant to the needs of industry and society in the twenty-first century, so they don’t appeal to full-fee or part-fee paying learners who demand value for both the money and the time they invest in their study. This ‘investment’ rationale is particularly strong among mature-age, part-time students whose numbers are likely to increase in response to the introduction of full fees in many countries. So we can expect to see a shift from lecturer- and content-oriented teaching to process-oriented facilitation of learning, as the competition intensifies among education providers – universities and private schools and colleges – to attract these students’ business. This type of learning is more relevant to the learner’s needs and to the needs of the organization he/she is working in and ideally sponsored by. The pedagogical shift is justified theoretically and confirmed in the adult learning literature. Incidentally, Knowles (1985) coined the term ‘andragogy’ for the science of adult learning as opposed to pedagogy, the science of child learning. It’s a pity he made the mistake of using the prefix andro (Greek prefix for male, man) instead of anthropo (Greek prefix for human, people). Anthropogogy would truly reflect the people-centred nature of this field of study, rather than indicating that it’s for men only! But why not simply refer to the field of ‘adult learning’?

MF: What will happen if universities resist this shift?

OZS: If universities don’t change their management education and adapt to the needs of business and industry, university reputation will suffer and student numbers will decline. This is very likely to induce a situation where university accreditation will no longer be warranted. Clients will prefer private business education by private providers. So university accreditation might soon be irrelevant, redundant or even undesirable, depending on how graduate schools of management develop in the future. There are encouraging signs from some progressive schools and colleges that have already introduced action learning programs and action research projects in their curriculum, for example, the University of South Australia and the Southern Cross University in New South Wales.
To come back to your question about university resistance to ALAR, I think it is no longer a question of whether ALAR is accepted by mainstream management circles. It’s now a question of whether ALAR users accept the paradigm, strategies and methods of mainstream management circles. We see here the classic economics of supply and demand since it’s these users – learners and often their corporations – who create the market demand that will sway the supply of educational service; i.e., pull it towards ALAR. The learning tide has already turned. This was confirmed more than a decade ago by the Karpin Report (1995) that criticized traditional management education in Australia and recommended, among other things, action learning programs as one of the main strategies for renewing Australia’s management and leadership skills to meet the challenges of the Asia-Pacific century and achieve global competitive advantage.

MF: And that’s what we were doing in the Australia–South Africa Links Project: ‘Leadership Development for South African Women Academics through action learning and action research.’

OZS: Yes, that’s an excellent example. [See discussion in Chapters 4 and 6.] Another example is our joint project with Chinese language teachers at Griffith University for which you and I received a grant from the National Priority Reserve Fund (NPRF) in 1993. These programs seek to introduce and develop acceptance of the paradigm, strategies and methods of ALAR within institutions of higher education.

The state of the field

MF: Some people have criticized the field of ALAR as theoretically thin. What do you think?

OZS: I think this assessment is indicative of the continuous struggle that ALAR undergoes in the academic domain, where many assess ALAR through a lens shaped by pedagogical premises quite different from their own – usually tendentiously. We also need to recognize relativity here. ALAR is a new field within the social sciences, which as a broader categorization is itself relatively new, compared with traditional sciences like the natural sciences. So in this sense it’s not surprising that by comparison with these older fields ALAR is not as established, institutionalized and theoretically rich. Yet it’s not as theoretically ‘thin’ as some critics try to portray. It already has a strong theoretical basis, which is continually being developed. By its very nature, ALAR advocates reflective learning on past experience to inform further action. It therefore cannot be one grand theory, as conventional theory may expect. It must comprise a complex network of related and inter-related theories that contribute to and strengthen the field.
The main philosophical pillars of this theoretical framework include action science, personal construct theory, systems theory and critical theory, as well as theories of EQ (Emotional Intelligence versus IQ) and of values/worldviews. In action research, for example, these theories may inform the action researcher, but more importantly – and this is a critical difference between action research and traditional research – action research generates theory not only about practice, but through practice. This is why action research has become recognized as a useful mode of human inquiry in situations where researchers are as active in changing situations as they are in explaining the situation and those changes. It’s also why action research requires intellectual skills different from those used in conventional academic tradition. Action research integrates action (change) and research (explanation and understanding) so its suitability depends on the task at hand.

MF: Action learning and action research are often marketed as a solution for the ‘real world’. I have a problem with this description since it insinuates that academia is ‘unreal’ and the business world is ‘real’. In my fields of Law and Chinese Studies we know that ‘reality’ is a construct, a perception, and that it’s often manipulated. So this understanding about the ‘real world’ is now outmoded. How could we recast ALAR?

OZS: I fully agree with your observation and I recognize that it also applies to ALAR. ‘Reality’ and ‘truth’ are theory-dependent constructs and may vary from person to person. When the business world conceives of academia as ‘unreal’, with academics confined to their ivory tower, it is probably because academics see their role as generating theory about action, and not mixing this role with generalizing theory in and through action.

So to recast the notion of action research, I suggest that we distinguish between research that yields theory/information only, and research that yields theory/information as well as improved practice (action, change). The latter is action research.

MF: Do you think that the method sits somewhere between (educational management) rationalism and entrepreneurial individualism? That perhaps it introduces an empowered sense of community into the workplace?

OZS: I think this question is inspired by recognition of the crucial roles of collaboration and risk taking in this method. However, I think the method of action learning and action research is definitely not located in rationalism or in entrepreneurial individualism, but in what our colleagues at Griffith University, David Limerick and his associates, used to call ‘collaborative individualism’. This means empowerment of the individual and clear recognition of the interdependence between individuals in ‘the new organization’ of the present and future.
On the basis of their research, these authors identify a number of key characteristics, competencies and skills of collaborative individuals that they develop in greater detail in their book (Limerick and Cunnington 1993:114–59): autonomous, proactive, empathetic, intuitive and creative, transforming, politically skilled, active in networking and mature. These are also key characteristics of action learners and action researchers.

MF: So, should we call ALAR something else?

OZS: That’s a very difficult, complex question. I’ve asked it often myself when I’ve tried to avoid using the ‘action’ terms, especially in competitive grant applications to be judged by traditional academics.

But why should we change the terms and language to suit traditional academics? I think we must remain truthful to our paradigm and practise what we preach. I recognize considerable potential for traditionalists to eventually recast their fields of endeavour to include ALAR in theory, practice and praxis. That is my optimistic view and it is happening already. I think that ALAR proponents will use their paradigm to institutionalize ALAR further as a legitimate approach. Ironically it’s because ALAR offers ways for action/change as well as critique, that ALAR can induce change in the dominant paradigms that try to subvert it.

The three separate traditions that were brought together in ALARPM in 1990 took many years to gain ground. But synthesized as ALAR, they have really gained credence in academic and business circles in the past two decades. I think this augurs well for ALAR in the years ahead. I’m especially optimistic since we’re living in times of rapid technological and social change, precisely when the strengths of ALAR are best demonstrated.

MF: On that optimistic note, let’s finish. Thank you, Ortrun, for your time.

OZS: My pleasure. Thank you for the opportunity to discuss the field.

Postscript

While reflecting on this interview, I suddenly realized that it was my attempt to respond to Mary’s questions that steered my thoughts towards three important actions that I took subsequent to this interview. One was to recognize and formulate action learning and action research as a field, as distinct from a network association. The second was to appreciate the value of such conversations as sources of oral history that, when presented in written form, become valuable contributions to recording the history of ALAR. The third was to conceive of action learning on the one hand and action research on the other as a new, integrated, holistic concept, i.e., ALAR. As I explain in this book, the concept of ALAR is based on certain philosophical and theoretical frameworks, human
values, worldviews and paradigms of knowing, learning, teaching and research. ALAR uses innovative processes and predominantly qualitative methods for achieving personal, professional and organizational goals.

Discussion Starters

1. What is your conception or understanding of:
   - Action learning
   - Action research
   - Process management

2. What have you learnt from this interview for your work or life?

3. What action do you plan to implement in the near future, using ALAR?

NOTES


REFERENCES