



**ACTION  
LEARNING**  
*and*  
**ACTION  
RESEARCH**  
*Genres and  
Approaches*

*Edited by*  
**ORTRUN ZUBER-SKERRITT**  
**LESLEY WOOD**

# **ACTION LEARNING AND ACTION RESEARCH**

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# **ACTION LEARNING AND ACTION RESEARCH: GENRES AND APPROACHES**

EDITED BY

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INVESTOR IN PEOPLE

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# Foreword

*Mary Brydon-Miller*

While on a recent visit to North-West University in South Africa hosted by one of the editors of this volume, Professor Lesley Wood, I had the opportunity to visit some local schools. We arrived at the school in Rustenburg to find that classes had been dismissed because there was no water. But while we were visiting the school, a community volunteer, John, arrived with two huge plastic tanks of water and the children who were still nearby gathered around to fill their bottles. Water shortages like this are a serious challenge for schools in this part of the country, but school leaders are working to address the problem through creative solutions like including systems for gathering rainwater in new school developments. And children are engaged in learning about the environment, working together on school gardening projects and monitoring weather stations located on the school grounds. These schools are the site of a Participatory Action Learning (AL) and Action Research (AR) project and are my partners in a global climate change education initiative. AL and AR are also at the centre of a campaign to protect local beaches on Panglao Island in the Philippines, to develop a social enterprise partnership between a motorway services site and local non-profit organizations in Southwest England, and in the creation of a new teacher mentoring program in my own hometown of Louisville, Kentucky.

All of these projects reflect the core tenets of AL/AR described in this book. And for the researchers and practitioners involved in these projects, and all those like them around the world, this volume is an important and timely contribution to finding more effective ways of engaging in community-based education, research and activism.

Key points raised by the editors and authors of this book concern what these strategies have in common as forms of AL/AR and what distinguishes them from one another. By sharing a focus on creating opportunities for community participation in order to address pressing economic, social, cultural and environmental issues, all these forms of AL/AR are founded on the understanding that human relationships and a shared commitment to serving as agents of positive change underlie everything we do in AL/AR. Adaptability and willingness to innovate and embrace the emergent nature of knowledge and understanding are additional

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hallmarks of all forms of AL/AR, as illustrated by the variety of approaches included in this volume. These approaches are used not only for community engagement but also in a wide variety of fields for personal, professional and organizational development, in small project teams or at large scale in a whole organization – nationwide or globally.

Contributions by many of the key figures in the world of AL/AR, as well as by rising leaders in the field, provide readers with a wealth of opportunities to explore the major themes and many variations of AL/AR. Researchers, practitioners, consultants and community partners new to AL/AR will find this book an invaluable guide to understanding and engaging in this approach to research, but even those of us who've been working in this area for many years will find new insights and inspiration.

Mary Brydon-Miller

## Acknowledgments

We sincerely thank three groups of people. One is the authors of this book for their collaboration, cooperation and excellent contributions to this volume. Another is our critical friends who kindly read and commented on the first draft chapters of this book, providing us with constructive critique and suggestions for improvement: from Austria, Stephan Laske; from Colombia, Doris Santos; from Israel, Victor Friedman; from New Zealand, Jan Robertson; from Singapore, Hairon Salleh; from South Africa, Annette Wilkinson and useful suggestions from Rod Waddington, Ansurie Pillay, Bruce Damons, Ansie Kitching, Corne Kruger, Elsabe Wessels, Marinda Neetlingh, Karen Venter and Akpovire Oduaran; from the United Kingdom, Mary McAteer and Mike Pedler; and from the United States, Davydd Greenwood and Margaret Riel. The third group is our ALARA friends in Brisbane, in particular Bob Dick and Ron Passfield.

We also acknowledge the helpful comments and suggestions for improving the quality of our work from Maureen Todhunter, our friend and professional copy-editor; and the assistance we received from proof-reader, Jo Anne Pomfrett; and from graphic designer, Anna Ng. Thanks also to the production team of Emerald who have provided excellent technical and editorial support.

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## Reviewers' Comments

*This edited collection takes on the valuable but difficult task of identifying the non-negotiable or defining characteristics of action learning (AL) and action research (AR). The task is difficult because the 'action' approach values multiple perspectives and worldviews and encourages participants to own and create their knowledge. This results in a family of approaches as AL/AR evolves to serve practitioners in their learning process. As editors, Zuber-Skerritt and Wood have invited a wide range of perspectives from AL/AR advocates/scholars who have contributed to the evolution of the now many genres. They close with embracing their goal of deepening understanding AL/AR as philosophy, methodology, theory of learning and process for community engagement. This book does an excellent job of challenging action researchers to critically think through their traditions in contrast to other approaches. The chapters provide a solid foundation for AL and AR approaches to create understandings and knowledge based on values and worldviews that uphold inclusion and will further develop the quality of social sciences and our democratic world.*

Margaret Riel, PhD, Director, Center for Collaborative Action Research,  
Pepperdine University, Los Angeles, CA, USA

*The author list for this edited book reads like a 'who's who' in action learning (AL) and action research (AR). These authors are leaders in the field internationally, bringing years of research and theoretical and professional experience to their writing. Many of these authors influenced my own action research PhD in coaching leadership over two decades ago and I wish such a text had been available then. It offers extensive perspectives on the subject, with strong validation of research methodologies. AR has been generally misunderstood in universities and not highly regarded as a research paradigm. Supervision of action research postgraduate studies can be problematic, and for the AL/AR scholar/researcher may feel murky and difficult to negotiate. But this complexity typically matches the wicked problems, often those of justice, social relationships and environmental sustainability, that ALAR seeks to address. In this way, the paradigm is true to its early beginnings in Kurt Lewin's work – in pursuit of social justice.*

*This is a text for leaders of organizations, schools and community groups, who want to engage the people who are affected by problems in the creation of the solutions. It offers readers inclusivity of perspectives and will be a beneficial read for beginning action researchers and their supervisors, more experienced action researchers wanting further critical perspectives and challenge, and for leaders in the field wanting to engage in participatory AL/AR.*

Jan Robertson, PhD, Adjunct Professor, Griffith University; Academic Leadership Consultant and Author of *Coaching Leadership: Building Educational Leadership Capacity Through Partnership*, New Zealand.

*In bringing together an impressive range of authors and perspectives from across the globe, Zuber-Skerritt and Wood have produced a text that celebrates the rich diversity and multi-perspective nature of action learning (AL) and action research (AR), while demonstrating the coherent framework in which these approaches operate. This important book will make a real contribution to the understanding and work of practitioners from a range of disciplines and contexts. It is clearly and coherently structured, with chapters that are accessible to novice AL/AR practitioners, yet offer critical challenge to those who are more experienced.*

*As a typology of these approaches, it is comprehensive and cogent. Presenting a critical discussion of each approach, it offers readers an opportunity to 'see inside' the practice and theory of these approaches in a range of contexts, each with its own complexity and challenges. Topics for discussion and reflection at the end of each chapter help the reader develop deeper understanding of the topic concerned, and more importantly, address the issue of values underpinning our actions, learnings and research. In this way, the book becomes more than the sum of its parts, clearly illustrating the power and potency of (and indeed great need for) such approaches in our contemporary world.*

Mary McAteer, PhD, Director of Professional Learning Programs, Edge Hill University, Lancashire, UK.

*This fine publication addresses a real need among followers (and critics) of action research, by clarifying and demystifying the most common genres of and approaches to action learning and action research (AL/AR). It filters and illustrates, and explains what AL/AR is and what it is not. The book re-establishes AL/AR as practical, collaborative, emancipatory, interpretive and critical – a philosophy, methodology and approach to learning and development for addressing complex global challenges.*

*In structuring the publication, the editors effectively weave together the rich voices of leading scholars of AL/AR. The result is a coherent assembly of diverse ideas and experiences that produce a wealth of distinctive, informative nuances.*

*This work can become an important reference on the shelves of researchers, authors and other practitioners. It has the potential to motivate and empower a wide readership to study, acknowledge, adopt and adapt AL/AR – further establishing its rightful place as a research paradigm suitable for bringing true social change in our times.*

Annette Wilkinson, PhD, Professor, University of the Free State, South Africa.

*I have learned that whenever Ortrun Zuber-Skerritt publishes something, it is worth paying attention. Zuber-Skerritt and Lesley Wood have put together an edited collection that is unusual in being integrated around a principled overview of the fields of action research (AR) and action learning (AL). The overview distinguishes usefully between action learning and action research, and makes a case for their synergies and differences in ways that enhanced my understandings greatly. This is accomplished by the editors' having recruited the principal exponents of the genres that are the topics of each chapter and asked them to reflect synthetically on their particular areas of work. The result is both a panoramic view of AL and AR and a*

*deep dive into many of the varieties of practice. The writing is clear, pedagogically adept, and analytically cogent. The editors and the contributors deserve great credit for having put together such a useful and thoughtful overview of these fields.*

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

*Forty years ago I applied for a Chair in Management and Business Education. In my application lecture I discussed the potential of Action Learning (AL) and Action Research (AR). Obviously, I do not remember any details of my speech. But still today I can recall that several colleagues on the appointment committee strongly questioned the value and the scientific character of AL and AR. Today, 40 years later we can find a large and differentiated body of research and practical experiences, and a broad range of contexts where AL and AR have proven their theoretical and empirical strengths. No longer are there serious doubts about the scientific relevance of these approaches.*

*This book is of great merit to its editors, Ortrun Zuber-Skerritt, the Australian Doyenne of AL and AR, and her colleague Lesley Wood, having collected contributions from outstanding scholars and experienced practitioners in the field of AL & AR from all over the world. This is not just a collection of articles. Presented within a well substantiated framework, the chapters reveal the evolution of this participatory, transformational paradigm, unfolding the great utility, diversity and richness of the various genres of AL and AR, and thus offering a very useful, comprehensive guide. Readers will benefit greatly from the didactic of every chapter – not only illustrating the what, why, and how of each genre, but also offering topics for further discussion and reflection, and tips for further reading. This rich collection on AL and AR can be very useful for not only emerging scholars and other newcomer practitioners but also for more experienced scholars, looking for their own way of adapting this approach creatively and constructively – at this time when AL and AR have such methodological relevance for resolving small and large scale difficulties in our complex world.*

Stephan Laske, PhD, Emeritus Professor, University of Innsbruck, Austria.

*This book brings together a collection of interesting works from established scholars to bring to light various genres and approaches in the fields of action learning and action research. From the conceptual discussions and practical exemplars, readers of this book who are new to action learning and action research will gain a clearer understanding of the what, how and why of action learning and action research. Readers with greater familiarity and experience in the field will gain a deeper appreciation of the field's traditions as well as new curiosity – or wondering into the future – about how action learning and action research can be relevant and integrated to new genres and approaches. This book is also a timely reminder of how the participatory paradigm can be a forceful counter response to the growing neoliberalism of the twenty-first century.*

Hairon Salleh, PhD, Associate Professor, Policy and Leadership  
Studies, National Institute of Education, Nanyang Technological  
University, Singapore.

*This book presents the self-reflective process of a group of Action Learning (AL) and Action Research (AR) practitioners and advocates. Readers are invited to become involved in this self-reflective process as the authors analyse the origins and development of most of the main genres of AL and AR through their own experiences while seeking to address global and local problems in complex contemporary times. Each chapter illustrates the diversity of ways to think and act collaboratively to address difficult situations through the various types of AL and AR. Together the chapters serve to demystify AL and AR and how they can be used or adapted to create conceptual and practical knowledge for, and while achieving, sustainable social change.*

Professor Doris Santos, Universidad Nacional de Colombia, Bogotá DC,  
Colombia, South America.

*I welcome the appearance of this new survey of action learning and action research, compiled by leading scholars from Australia, USA, UK, Ireland, South Africa and Austria. This book promises some interesting excursions into intriguing aspects of action learning and action research practice in a difficult field of work.*

Professor Mike Pedler, Emeritus Professor of Action Learning at Henley  
Business School, University of Reading, UK.

## About the Authors

**Mary Brydon-Miller**, PhD, is a Professor in the Department of Educational Leadership, Evaluation, and Organizational Development in the College of Education and Human Development at the University of Louisville, USA. She also holds the honorary title of Extraordinary Professor in the research entity of Community-based Educational Research at North-West University, South Africa. She is a participatory action researcher who conducts work in both school and community settings. Her current research focuses on research ethics in educational and community settings. She is the Editor, with David Coghlan, of the *SAGE Encyclopedia of Action Research* and has recently completed work on a book on ethical challenges in the context of participatory research with her colleague Sarah Banks from Durham University, UK. Her next major project focuses on working with middle-school students from around the world to engage as citizen scientists to better understand the impacts of global climate change.

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**Bob Dick**, DLitt, is an Independent Scholar, an occasional academic, a coach and mentor and a consultant in community and organizational change. He has been a practitioner and an academic for almost a half century, and continues to work in both fields. In both he uses concepts and processes from action research, action learning, action science, narrative and community and organization development to help people (including himself), organizations and communities to improve their work, learning and life. The single most important book he read as a practitioner was *Theory in Practice*, the 1974 book in which Argyris and Schön introduced the foundational elements of action science to the world. Since then, action science has been a core influence on his work. It influences much of what he does and how he does it. Bob resides in Brisbane's leafy western suburbs with the love of his life, Camilla.

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*Action Learning in Action; Global Leaders for the 21<sup>st</sup> Century; Global Human Resource Development; Technology-based Learning; and Global Teams.* Over one million copies of his publications have been sold in nearly a dozen languages worldwide. Mike also served as the Editor of the UNESCO Encyclopedia volume on Human Resources and is an editor and/or advisor for several leading professional journals around the world. He has been a keynote speaker at international conferences in Australia, Japan, Philippines, Malaysia, South Africa, Singapore and India as well as throughout North America.

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**Richard Teare**, PhD, is Co-founder and President, Global University for Lifelong Learning (GULL), a non-profit international network movement that works with other organizations to facilitate self-help in communities and the workplace. Earlier, he held professorships at four UK universities and he is currently an Adjunct Professor, Caribbean Maritime University, Jamaica. Richard has been an Emerald journal editor for more than 30 years and his academic publications include 23 authored, co-authored and edited books on aspects of community development, service management and organizational learning. Among these, he is the author of *Lifelong Action Learning: A Journey of Discovery and Celebration at Work and in the Community* (Amazon, 2018) and co-author of *Lifelong Action Learning for Community Development* (Sense, 2013) and *Designing Inclusive Pathways with Young Adults* (Sense, 2015) the first and second in a series of books about GULL's work with communities.

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**Diana Whitney**, PhD, a leading figure in the fields of Appreciative Inquiry and Large Scale Change, has been at the forefront of positive change theory and practice in the USA and worldwide for three decades. She founded the international consultancy, Corporation for Positive Change, and co-founded the social constructionist think tank, the Taos Institute. Her work – designing and facilitating strategic culture transformation, merger integration and leadership development with Fortune 100 companies – has gained her a worldwide following. She is a prolific and award-winning author of dozens of chapters and articles and 20 books, including *The Power of Appreciative Inquiry*; *Appreciative Leadership*; *Appreciative Inquiry: A Positive Revolution in Change*; and *Positive Approaches to Peacebuilding*.

**Lesley Wood**, DEd, is a Research Professor in the Faculty of Education and Director of the research niche area, Community-based Educational Research at North-West University, South Africa. She is a National Research Foundation rated researcher whose interests lie in researching participatory ways to facilitate

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**Stefan Zehetmeier**, PhD, is an Associate Professor at the University of Klagenfurt, Austria. He has experience with action research in diverse contexts for more than 15 years. As researcher and teacher educator, he was involved in several Austrian large-scale teacher professional development programs based on action research. Moreover, he was involved in national and international research and development projects based on action research. His further research interests include mathematics and science teacher education, school development, evaluation and impact analysis of teacher professional development programs.

**Ortrun Zuber-Skerritt**, PhD, is an Adjunct Professor at Griffith University, Australia; Honorary Research Fellow at North-West University, South Africa; and Pro Chancellor, Global University for Lifelong Learning (GULL), USA. After her undergraduate and postgraduate education in German universities, she obtained four doctoral degrees while living in Australia: PhD in Literature and Applied Linguistics (University of Queensland, 1976), PhD in Higher Education (Deakin University, 1986), DLitt in Management Education (International Management Centres, UK, 1992) and an Honorary Doctorate in Professional Studies (GULL, USA, 2008). Ortrun has published 42 books, over 70 book chapters, over 60 refereed journal articles and more than 100 professional and conference papers, and has produced over 50 educational video programs. She has been awarded over \$1.2 million in competitive R&D grants and has led action research and leadership development programs in many universities in Australia, New Zealand, Hong Kong, Singapore, Japan, Sweden, Holland, Austria, Germany, England, the United States, Canada, Fiji, South America and South Africa. In 2018 she was appointed an Officer of the Order of Australia, a prestigious national honour for “distinguished service to tertiary education in the field of action research and learning as an academic, author and mentor, and to professional bodies.”

# List of Acronyms

ACT	Acceptance and Commitment Therapy
AERA	American Educational Research Association
AI	Appreciative Inquiry
AI 4-D cycle	Discovery, Dream, Design and Destiny (Destiny, aka Delivery)
AIDS	Acquired Immune Deficiency Syndrome
AL	Action Learning
ALAR	Action Learning and Action Research
ALARA	Action Learning and Action Research Association
ALARPM	Action Learning, Action Research and Process Management
ALS	Action Learning Set
AR	Action Research
ARNA	Action Research Network of the Americas
BBP	Basic Business Philosophy
BRC	British Red Cross
BSc	Bachelor of Science
BTU	British Thermal Unit
CARN	Collaborative Action Research Network
CCM	Church and Community Mobilization
CEO	Chief Executive Officer
COMBER	Community-Based Educational Research
CPAR	Critical Participatory Action Research
CPM	Confident People Management Program
DBA	Doctor of Business Administration
DEd	Doctor of Education
DFID	Department for International Development (UK)
DLitt	Doctor of Letters
EAR	Educational Action Research
EC	European Community
EdD	Doctor of Education
EJOLTS	<i>Educational Journal of Living Theories</i>
ENSI	International Environment and School Initiatives Project
GCWAL	Global Centre for Work-Applied Learning
GLE	Granada Learning Experience
GM	General Manager
GULL	Global University for Lifelong Learning
HDI	Human Development Institute

*xxii List of Acronyms*

HDWFD	Hunter Douglas Window Fashions Division
HIC	Hospital International Communications
HIV	Human Immunodeficiency Virus
HR	Human Resources
HRD	Human Resource Development
HRO	High Reliability Organization
ICF	International Coaching Federation
IDP	Internally Displaced People
IDS	Institute of Development Studies
IFAL	International Federation of Action Learning
IFR	<i>International Financial Review</i>
IMCA	International Management Centres Association
IMST	Innovations Make Schools Top Program
INGO	International Non-governmental Organization
IUS	<i>Institut für Unterrichts- und Schulentwicklung</i> (Institute for Instructional and School Development)
JWCS	Joy to the World Community Services
LAL	Lifelong Action Learning
LfT	Learning for Transformation
LL	Lifelong Learning
MA	Master of Arts
MAPP	Mindfulness All-Party Parliamentary Group
MARC	Mindful Awareness Research Center
MASA	Mindfulness, Action Learning, Self-Awareness, Agency Model
MBA	Master of Business Administration
MBSR	Mindfulness Based Stress Reduction
MEd	Master of Education
MHCD	Mental Health Centre of Denver
MPhil	Master of Philosophy
MSc	Master of Science
MTSF	Medium Term Strategic Framework
NEARI	Network Educational Action Research Ireland
NGO	Non-governmental Organization
NRF	National Research Foundation
OD	Organizational Development
PALAR	Participatory Action Learning and Action Research
PAR	Participatory Action Research
PASA	People Against Sexual Abuse (renamed Positive Attitudes, Solutions and Actions)
PFL	<i>Pädagogik und Fachdidaktik für Lehrkräfte</i> (Teacher Education in Subject Areas)
PhD	Doctor of Philosophy
PM	Process Management
PNG	Papua New Guinea
PRIA	Participatory Research in Asia
ProFil	<i>Professionalität im Lehrberuf</i> (Professionalism in the Teaching Profession)

PV	Personal Viability
RANIR	Refugee Action Network for IDP [Internally Displaced People] and Refugees
R&D	Research and Development
SAAGG	South Asian Academy for Good Governance
SAR	Systemic Action Research
S-ART	Self-Awareness, Self-Regulation and Self-Transcendence Model
Seven Cs	Communication, Collaboration, Commitment, Coaching, Critical and self-critical attitude, Competence, Character
SOS	Sense of Self
SPHR	Senior Professional in Human Resources
SPIRAL	Systemic Participatory Inquiry Research and Action Learning
Three Es	Emancipation, Empowerment, Emergence
Three Rs	Relationships, Reflection, Recognition
TSR	Training, Service and Revenue
TUC	Trade Union Council
UK	United Kingdom
UNESCO	United Nations Educational, Scientific and Cultural Organization
US	United States
USA	United States of America
USAID	US Agency for International Development
USIP	United States Institute of Peace
VCU	Virginia Commonwealth University [USA]
VSO	Voluntary Service Overseas
WIAL	World Institute for Action Learning
WV	World Vision
WVI	World Vision International
WVL	World Vision Lebanon
WVSL	World Vision Sri Lanka
WVM	World Vision Mongolia

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