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Insider Action Research Projects Implications for Practising Managers

Abstract *Managers are increasingly undertaking action research projects in their own organizations. Action research involves opportunistic planned interventions in real time situations and a study of those interventions as they occur, which in turn informs further interventions. Insider action research has its own dynamics, which distinguish it from an external action researcher approach. The manager–researchers are already immersed in the organization and have a preunderstanding from being an actor in the processes being studied. Challenges facing such manager–researchers are that they need to combine their action research role with their regular organizational roles and this role duality can create the potential for role ambiguity and conflict. They need to manage the political dynamics, which involves balancing the organization’s formal justification of what it wants in the project with their own tactical personal justification for the project. Manager–researchers’ preunderstanding, organizational role and ability to manage organizational politics play an important role in the political process of framing and selecting their action research project. In order that the action research project contribute to the organization’s learning, the manager–action researcher engages in interlevel processes engaging individuals, teams, the inter-departmental group and the organization in processes of learning and change. Consideration of these challenges enables manager–action researchers to grasp the opportunities such research projects afford for personal learning, organizational learning and contribution to knowledge. **Key Words:** insider action research; manager–researcher; organizational politics; project-based management; role duality*

Managers are increasingly engaging in action research projects in their own organizations. Commonly these projects are undertaken as part of the academic requirements in executive education programmes, such as executive MBA programmes or practitioner doctoral DBS programmes (Gosling and Ashton, 1994; Perry and Zuber-Skerritt, 1994; Coghlan and McDonagh, 1997; Coghlan and Brannick, 2001). Issues of organizational concern, such as systems improvement, organizational learning, the management of change and so on are suitable subjects for action research, since (a) they are real events which must be managed in real time, (b) they provide opportunities for both effective action and learning, and

(c) they can contribute to the development of theory of what really goes on in organizations. Riemer (1977) argues that rather than neglecting 'at hand' knowledge or expertise, researchers should turn familiar situations, timely events or special expertise into objects of study. Riemer's proposal for opportunistic research is appropriate for those researching their own organization, and in particular those engaging in action research in their own organization. In this article I will explore some of the key issues which arise when practising managers grasp organizational opportunities to engage in action research projects in their own organizations. As the action research literature tends to take the perspective of the action researcher as an external agent, this exploration of insider action research provides an important contribution to consideration of action research and project-based learning by practising managers (Coghlan and Brannick, 2001).

Managers who undertake action research projects may be located anywhere in their organization's hierarchy. Nuttall (1998) was Head of Site when he undertook his doctoral research. As Krim (1988) was Director of Personnel for Human Resource Development in a city hall he undertook an action inquiry approach to setting up a labour-management participation programme for his PhD. Hierarchical location has undoubted implications for what may be researched and how. Higher-level executives may have more access, especially downward through the hierarchy, but being in a high executive position may exclude them from access to informal and grapevine networks. Middle- or lower-level executives may find upward access difficult and be confined to their function or division.

Action Research

The central tenets of action research can be expressed (Argyris et al., 1985):

1. It involves change experiments on real problems in social systems. It focuses on a particular problem and seeks to provide assistance to the client system.
2. It, like social management more generally, involves iterative cycles of identifying a problem, planning, acting and evaluating.
3. The intended change in an action research project typically involves re-education, a term that refers to changing patterns of thinking and action that are presently well established in individuals and groups. A change intended by change agents is typically at the level of norms and values expressed in action. Effective re-education depends on participation by clients in diagnosis, fact-finding and free choice to engage in new kinds of action.
4. It challenges the status quo from a participative perspective, which is congruent with the requirements of effective re-education.
5. It is intended to contribute simultaneously to basic knowledge in social science and to social action in everyday life. High standards for developing theory and empirically testing propositions organized by theory are not to be sacrificed nor the relation to practice be lost.

Managers who undertake an action research project in and on their own organization do so while being a complete permanent member, by which I mean that the managers want to remain a member within their desired career path when

the research is completed. Insider action research has its own dynamics, which distinguish it from an external researcher approach (Coghlan and Brannick, 2001). The researchers are already immersed in the organization and have built up knowledge of the organization from being an actor in the processes being studied (Evered and Louis, 1981). This knowledge comes from the actor engaging in the experiential learning cycles of experiencing, reflecting, conceptualizing and experimenting in real situations (Kolb, 1984; Revans, 1998; Raelin, 2000). There are a number of significant challenges for those managers considering action research in their own organization which I will explore under the following headings: preunderstanding, role duality, and organizational politics.

Preunderstanding

'Preunderstanding refers to such things as people's knowledge, insights and experience before they engage in a research programme' (Gummesson, 2000: 57).

The knowledge, insights and experience of the manager-researchers apply, not only to theoretical understanding of organizational dynamics, but also to the lived experience of their own organization. Nielsen and Repstad (1993) outline some examples of such experience and preunderstanding. Managers have knowledge of their organization's everyday life. They know the everyday jargon. They know the legitimate and taboo phenomena of what can be talked about and what cannot. They know what occupies colleagues' minds. They know how the informal organization works and whom to turn to for information and gossip. They know the critical events and what they mean within the organization. They are able to see beyond objectives that are merely window dressing. When they are inquiring they can use the internal jargon and draw on their own experience in asking questions and interviewing, and be able to follow up on replies and so obtain richer data. They are able to participate in discussions or merely observe what is going on without others necessarily being aware of their presence. They can participate freely, without drawing attention to themselves and creating suspicion.

There are also some disadvantages to being close to the data. When action research manager-researchers are interviewing they may assume too much and so not probe as deeply as if they were outsiders or ignorant of the situation. They may think they know the answer and not expose their current thinking to alternative reframing. They may find it difficult to obtain relevant data, because as a member they have to traverse departmental, functional or hierarchical boundaries or because as an insider they may be denied deeper access, which might not be denied an outsider. These pose considerable challenges to the manager-researcher and require rigorous introspection and reflection on experience in order to expose underlying assumptions and unreflected action to continuous testing (Argyris et al., 1985).

Role Duality: Organizational and Researcher Roles

When managers augment their normal organizational membership role with the research enterprise, it can be difficult and awkward, and can become confusing for them. As a result, in trying to sustain a full organizational membership role and the research perspective simultaneously, they are likely to encounter role conflict

and find themselves caught between loyalty tugs, behavioural claims and identification dilemmas (Ramirez and Bartunek, 1989; Holian, 1999).

Their involvement in the two roles affects their relationships with fellow organizational members (Adler and Adler, 1987). The new dimension of their relationship to fellow organizational members sets them apart from ordinary members. Their organizational relationships are typically lodged and enmeshed in a network of membership affiliations. These friendships and research ties can vary in character from openness to restrictiveness. Manager-action researchers are likely to find that their associations with various individuals and groups in the setting will influence their relationships with others whom they encounter, affecting the data that can be generated in working with them. Probably the most important issue for manager-action researchers, particularly when they want to remain and progress in the organization, is managing organizational politics.

Managing Organizational Politics

Undertaking an action research project in one's own organization is political and might even be considered subversive. Weinstein (1999) lays out the subversive characteristics of action research. It examines everything. It stresses listening. It emphasizes questioning. It fosters courage. It incites action. It abets reflection and it endorses democratic participation. Any or all of these characteristics may be threatening to existing organizational norms. While action research manager-researchers may see themselves as attempting to generate valid and useful information in order to facilitate free and informed choice so that there will be commitment to those choices in accordance with the theory and practice of action research (Argyris and Schon, 1996), they may find, as Kakabadse (1984) argues, that what constitutes valid information is intensely political.

Accordingly, action research manager-researchers need to be politically astute in deciding to engage in action research, becoming what Buchanan and Badham (1999) call a 'political entrepreneur'. In their view, this role implies a behaviour repertoire of political strategies and tactics and a reflective self-critical perspective on how those political behaviours may be deployed. Buchanan and Boddy (1992) describe the management of the political role in terms of two activities: performing and backstaging. *Performing* involves the public performance role of being active in the change process, building participation for change, and pursuing the change agenda rationally and logically, while backstage activity involves the recruitment and maintenance of support and the reduction of resistance. *Backstaging* comprises skills at intervening in the political and cultural systems, through justifying, influencing and negotiating, defeating opposition and so on. As we have seen, action research manager-researchers have a preunderstanding of the organization's power structures and politics, and are able to work in ways that are in keeping with the political conditions without compromising the project or their own career. Political knowledge was a critical element in Krim's (1988) city hall organization. However, as he points out, his understanding of the informal knowledge-based power structure was inadequate when he underestimated the connection power of one particular individual whom he tried to replace. That person was able to muster considerable support to resist Krim's efforts to replace her and severe confrontational conflict ensued.

As action research manager–researchers engage in their project, they need to be prepared to work the political system, which involves balancing the organization's formal justification of what it wants in the project with their own tacit personal justification for political activity. Throughout the project they have to maintain their credibility as an effective driver of change and as an astute political player. The key to this is assessing the power and interests of relevant stakeholders in relation to aspects of the project.

Nuttall (1998) in his reflection on his joint roles of head of site and researcher noted the political complexity of requesting subordinates to answer questionnaires that have been distributed by their boss. He concluded that his own participative management style, built up over six years, resulted in a trusting relationship between his subordinates and himself and enabled them to speak freely and provide the information he sought. At the same time, he was aware that he needed to counter the influence of bias, and so he engaged a neutral research assistant to conduct some interviews and then to compare transcripts.

Framing and Selecting the Action Research Project

The interconnectedness of preunderstanding, role duality and organizational politics become evident in the process of framing and selecting an action research project in one's own organization. The complexity of issue identification and selection illustrates that the search for an appropriate issue to study is difficult (Coghlan and Brannick, 2001; Coghlan and McDonagh, 1997). How does a manager–researcher get a sense of the range of possible issues that may be addressed? Not every issue will volunteer itself automatically for attention. While acknowledging the existence of a wide and diverse range of issues it is important to understand that any issue once selected for attention may be embedded in a set of related issues (Beckhard and Harris, 1987). Manager–researchers are then confronted with choices concerning boundaries and are obliged to decide what can be achieved within the time and resources available.

Thinking in terms of issues, rather than problems or opportunities, which warrant attention is vital as language and labels are of the utmost importance at the outset (Dutton et al., 1983; Cooperrider and Srivastva, 1987). For example, framing proposed research initiatives in the context of addressing problems or opportunities carries some inherent risks. Framing an issue as a problem may influence who gets involved in problem resolution. It may be that organizational members embrace problems with a sense of loss, wondering about the organization's ability to reach a satisfactory resolution and often preferring to remain somewhat detached and uncommitted. Using the word 'problem' as distinct from 'opportunity' may also lead to convergent thinking (Dutton et al., 1983). The mental effort expended on problem resolution may restrict the range of alternatives considered blinding organizational members to the possible existence of novel solutions. In a similar vein the use of the label 'opportunity' may lead to divergent thinking as this label has a greater sense of gain associated with it. Organizational members may feel a sense of excitement about tackling a significant opportunity that may have the potential for creativity.

Language and labels are important as they have the potential to influence risk-taking behaviour (Dutton et al., 1983). It may be that thinking in terms of opportunities cultivates a risk-taking culture while thinking in terms of problems cultivates a risk-averse culture. If managers think with an opportunity mindset, then they are less likely to embark on a witch hunt looking for someone to blame—as there is nothing for which to blame them—while the mindset associated with problems embraces the notion of finding a scapegoat. It seems obvious from the above that there is merit in thinking in terms of issues without any attempt to sub-classify such issues in the first instance.

What becomes important then is to uncover the issues that are viewed by organizational members as key issues warranting attention at any point in time. In cases that involve complex organizational change, many of these key issues may initially fall in the category of first-order change (Bartunek and Moch, 1987). As already noted, not all issues are blatantly obvious and it is therefore important for the researcher to get a sense of both the obvious and less obvious. It may be that the obvious is but an outward manifestation of a deeper issue which organizational members are not so willing to embrace publicly. Identification of these deeper issues may point to the need for second-order change. What if the obvious only seems that way due to being ill informed on the nature of the issue at hand? Could it be that the obvious has become so as it embraces the language of dissent and reflects the preoccupations of organizational members with consequences, without ever reflecting on root causes?

Action research manager-researchers need to go with the story as it evolves. They are constantly testing as to whether consensus exists concerning the array of issues that could be addressed (Dutton and Duncan, 1987; Dutton and Jackson, 1987). Such an array may be constructed having considered organizational members' perceptions of key issues. It may embrace a healthy diversity of thinking among organizational members or, alternatively, it may point to significant pockets of conflict in certain issue domains. Change triggers discussion, debate and arguments between people who champion competing ideas and proposals. Such discussion provides useful data and is desirable in order to expose different ideas to public scrutiny and examination (Buchanan and Badham, 1999).

No issue in an organization is context free (Dutton and Ottensmeyer, 1987). Uncovering issues necessitates establishing not only multiple versions of 'the real facts' but also understanding the role history in organizational members' perceptions of these facts. How can we collect data about this? An issue may be embedded in a system of political behaviour, which it is critical to understand if issue resolution is ever to be negotiated. Krim (1988) reports how he was told that open sharing of information in city hall was dangerous and foolhardy.

The process of identifying issues may be characterized as fluid, dynamic and emergent (Dutton et al., 1983). It is fluid in the sense that it is difficult to establish precise boundaries and when such boundaries are established they are often subject to change. It is dynamic in the sense that the core focus is subject to continuous revision as understanding deepens. It is emergent in the sense that issues appear over time. These key characteristics point to a process which is further characterized by the unfolding nature of interpretation and reinterpretation making extensive use of organizational members' judgements, and revision of

judgements based on insights gained from new and existing data, stimuli and perceptions. Ramirez and Bartunek (1989) describe how rumours were spread around the health care organization in order to discredit the action researcher to the effect that she was using the project to set up a position for herself. Krim (1988) was advised by key colleagues that he was not handling power differences very well and given a copy of a pamphlet, 'How to Swim with Sharks', and advised to be more 'shark-like'.

Of immediate importance, then, to manager-researchers is the need to gather and organize these data, stimuli and perceptions of themselves and others. The subsequent sense making process points to the need for them to have good organizational and analytical capabilities. Krim (1988) kept a journal of his reflections and observations, and used his academic supervisors to test them in a safe environment.

Finally, it is important when categorizing issues that each issue is framed in the context of its implicit and explicit assumptions, any known causal relationships, and any predictive judgements concerning the speed of issue resolution (Dutton et al., 1983). Making assumptions explicit aids the resolution process as organizational members develop a shared understanding of the issue being addressed in terms of its history, scope and possible outcomes. Establishing causal relationships helps to place an issue in context by grounding it in organizational reality while simultaneously establishing how organizational members attribute certain outcomes to root causes. Outlining predictive judgements attaches a sense of urgency, or otherwise, to the issue at hand.

Contributing to Organizational Learning

The question then arises, how do the action research projects of individual managers contribute to both the ongoing learning of the organizations in which these manager-researchers work and to the community of organizational scholars? To answer this question we need (a) an inclusive notion of research and (b) an organizational framework that integrates individual and organizational learning.

Traditionally, research addresses the audience of the community of scholars; and applied practical research addresses an outside audience in reports, recommendations and so on. In contrast, in the view of some (Reason and Marshall, 1987; Reason, 1999), all good research communicates with three audiences:

All good research is *for me*, *for us*, and *for them*: it speaks to three audiences and contributes to each of these three areas of knowing. It is *for them* to the extent that it produces some kind of generalizable ideas and outcomes that elicit the response, 'That's interesting'. It is *for us* to the extent that it responds to concerns for our praxis, is relevant and timely and produces the response, 'That works' from those who are struggling with problems in their field of action. It is *for me* to the extent that the process and outcomes respond directly to the individual researcher's being-in-the-world, and so elicits the response, 'That's exciting'. (Reason and Marshall, 1987: 112-13)

Torbert (1998) frames this inclusivity in terms of first, second and third person research.

How then does the action research project of the practising manager contribute to all three forms of research? Clearly first person research is beneficial to the individual manager in terms of personal learning and skill development, though it may not promote the individual's organizational career prospects in the organization (Krim, 1988; Bartunek et al., 1999; Holian, 1999). In terms of second person research, the project is useful to the organization through some forms of first or second order change (Bartunek et al., 2000). In terms of third person action research, it provides valuable experience and rigorous study of what it is really like in organizations (Schein, 1993).

The integration of first and second person research and individual and organizational learning occurs through attention to the levels of aggregation that exist in organizations. These levels describe not only levels of analysis, such as individual, team, interdepartmental group and organization, but interlevel dynamics, such as the impact the individual has on the team and vice versa, the team on other teams, and the organization on individuals, teams and the interdepartmental group and vice versa. Such interlevel dynamics are integral to the nature of organizations as recursive systems (McCaughan and Palmer, 1994), and attention to them is critical to the processes of organizational change and learning (Coghlan, 1996, 1997; Rashford and Coghlan, 1994; Roth, 1996).

First, there is the individual learning and change level for manager-researchers, whereby they attend to their own learning-in-action through their action research project (Raelin, 2000). Yet the individual manager-researchers' own personal learning and change are not sufficient if they aim to effect change in larger and more complex systems than themselves. Typically, the most immediate experience individuals have of an organization is as a member of a team or group. It is through that membership that individuals exercise their role and influence. Hence, the second level of attention is to the dynamics of the teams in which they work and that they utilize in their projects. Such attention involves consideration of content and process issues (Schein, 1999). For a team to learn, its members need to attend and engage in dialogue on such issues as how its members communicate among themselves, solve problems, make decisions and so on (Schein, 1999; Wheelan, 1999).

Yet the research and change process cannot be restricted to learning and change by individuals and teams alone. The learning and change which takes place in individuals and teams needs to be generalized across the interdepartmental group, whereby other teams and units engage in dialogue and negotiation. A critical focus for attention in this regard is the impact of cultural perspectives from different functions on the change process (Schein, 1992). Intergroup dialogue needs to take account of how functional areas in organizations hold different assumptions from and about one another. An interesting development in this regard, which is increasingly becoming a significant action research mechanism, is the role of large group interventions, whereby the whole system gathers in the one room to explore its identity and future direction (Martin, 2001).

Finally, the research project does not stop within the organization. Organizations as open systems have a dynamic two-way relationship with their external environment (Katz and Kahn, 1978). The research process needs to include how the organization is affecting and being affected by, its customers or clients,

stakeholders, local community, competitors, wider society and other organizations (Chisholm, 1998).

Viewing organizations through levels of analysis is only one part of the picture. The other part refers to how each of the levels is related to each of the others. There is an essential inter-level element in that each level has a dynamic relationship with each of the others. This relationship is grounded in systems dynamics, whereby the relationship each of the four levels has with the other three is systemic, with feedback loops forming a complex pattern of relationships (McCaughan and Palmer, 1994; Senge, 1990). Dysfunctions at any of the four levels can cause dysfunctions at any of the other three levels. An individual's level of disaffection may be expressed in dysfunctional behaviour in the team and affect a team's ability to function effectively, which in turn reinforces the individual's disaffection. If a team is not functioning effectively, it can limit the inter-departmental group's effectiveness, which may depend on the quality and timeliness of information, resources and partially completed work from that team. If the interdepartmental group's multiple activities are not co-ordinated, the organization's ability to compete effectively may be affected. In systemic terms, each of the four levels affects each of the other three.

For action research manager-researchers, the political dynamics of framing and selecting an action research project, of using their preunderstanding and the action research process to assess the scope of the issue and the degree of political support and/or opposition involve working with individuals, teams, and across the interdepartmental group in order that individual learning can be aggregated into organizational learning (Coghlan, 1997). Such dynamics are critical to bridging the wide gap which exists between individual and organizational learning.

The Value of Insider Action Research for Project-based Learning

In many respects most of the above elements pertain to any work-based project. All managers need to be able to engage in experiential learning or action research, to use their preunderstanding in their managerial role and be able to manage organizational politics. What role, then, does insider action research contribute to project-based learning? There are two elements to an answer to this question.

First, project-based learning demands rigour. Rigour in action research refers to how data are generated, gathered, explored and evaluated, how events are questioned and interpreted through multiple action research cycles (Eden and Huxham, 1996). In other words, action research manager-researchers need to show:

1. how they engaged in the steps of multiple and repetitious action research cycles (how diagnosing, planning, taking action and evaluating were done), and how these were recorded to reflect that they are a true representation of what was studied;
2. how they challenged and tested their own assumptions and interpretations of what was happening continuously through the project by means of public reflection, so that their familiarity with and closeness to the issues are exposed to critique;
3. how they accessed different views of what was happening which probably produced both confirming and contradictory interpretations; and

4. how their interpretations and diagnoses were grounded in scholarly theory, rigorously applied, and how project outcomes were challenged, supported or disconfirmed in terms of the theories underpinning those interpretations and diagnoses.

The value in action research is not whether the project was successful or not, but rather that the exploration of the data, i.e. how a particular project was managed, provides useful and interesting theory which may contribute to learning on the subject of project-based management.

Second, action research consultants or trainers play an important role in ensuring that action research projects generate individual and organizational learning. Through a range of interventions which focus on enabling manager-researchers to engage in inquiry, reflection and theorizing about their project, action research consultants facilitate the enactment of action research cycles on the research project itself. Such interventions typically implement a range of process consultation behaviours, for example exploratory and diagnostic inquiry and confrontation (Schein, 1999; Coghlan and Brannick, 2001).

Conclusions

In this article I have reflected on the opportunities and challenges for managers doing action research projects in and on their own organization, while being a complete permanent member, which in this context means both having insider preunderstanding and access, and wanting to remain a member within a desired career path when the research is completed. This view of action research is rarely afforded much attention (Coghlan and Brannick, 2001).

In considering such insider action research projects, potential manager-researchers need to be aware of the strengths and limits of their preunderstanding, so that they can use their experiential knowledge to reframe their understanding of situations to which they are close. They need to consider the impact of organizational politics on the process of inquiry, who the major players are, and how they can be engaged in the process. Preunderstanding of organizational politics plays an important role in framing and selecting an insider action research project. What appears clear at the outset may lose its apparent clarity as the project unfolds. How the project is framed and subsequently reframed may be a source of important learning. Finally, the ability of individuals' action research projects to have an impact on what and how the organization learns involves strategies of aggregating individual learning to team and interdepartmental group and organizational learning. Consideration of such issues as these enables managers to meet the challenges of doing action research in their own organization, and so provide interesting and exciting research for the development of their organizations.

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