

Critical Action Learning: An Examination of the Social Nature of Management Learning and Development

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Abstract

The debate surrounding the nature and purpose of management education in the UK's business schools is inextricably entwined with the notion of management as a profession and the nature of management knowledge. Universities have traditionally been viewed as being at the cutting edge of the creation of knowledge about management and of being the ideal site for the education of managers. However, there is a growing disquiet about the relationship between management knowledge and practice and the ability of business schools to develop managers of the calibre needed by the UK to compete internationally.

Whilst acknowledging that the nature of management knowledge and the political forces which shape its creation are important in this debate, the emphasis here is on how managers learn. Action learning has long been held up as the answer to the lack of a critically reflective element in management education yet there is little evidence to show that it has fulfilled its promise. The nature of Critical or critical management education is considered and the utility of Critical Management pedagogy is questioned.

There are few accounts of action learning being used in higher education and a confusing range of descriptions of what action learning is. Therefore, a large-scale action learning project in the Small and Medium Sized Enterprise sector was chosen as the site of study. Data are reported and analysed from participant observation at eight action learning set meetings, 21 individual interviews and 19 learning journals. Whilst the initial intention was to use discourse analysis, this was abandoned as the power of 'words in their speaking' became apparent as a mediator of critical reflection both in the action learning set and in the interviews.

An updated framework for conceptualizing learning is offered which describes various levels of learning. However, the model proposed here is much more explicit about the nature of reflection or reflexivity at each level, exemplifying particularly how critical reflection is at the core of higher level learning.

Social constructionist approaches to learning, including action learning, are proposed as a philosophical underpinning for management education and as synonymous with critical reflection. Blockages to the introduction of such a pedagogical philosophy in business schools include a lack of consideration given to teaching

and learning and a continuing emphasis on research output as the direct route to secure funding for the school and promotion for oneself as an academic. There is an ongoing and urgent need to ignite this debate and to create accounts of best practice that may inspire thoughtful teaching and learning thus fulfilling our obligation as academics to the wider management community.

Table of Contents

Introduction	1
Chapter One. Management education, learning and development.....	5
<i>Management development and management learning</i>	<i>5</i>
<i>A chronology of management education and development policy</i>	<i>7</i>
<i>Where are we today?.....</i>	<i>10</i>
<i>The relationship between management knowledge and practice....</i>	<i>13</i>
<i>Management as a profession</i>	<i>13</i>
<i>The role of the business school in creating management knowledge.....</i>	<i>15</i>
<i>The MBA debate.....</i>	<i>20</i>
<i>The purpose of this study</i>	<i>22</i>
Chapter Two. Exploring the nature of learning and reflection.....	24
<i>Introduction</i>	<i>24</i>
<i>How do managers learn to manage?.....</i>	<i>25</i>
<i>Kolb's theory of Experiential Learning</i>	<i>27</i>
<i>Reflection</i>	<i>30</i>
<i>'Transformative' learning.....</i>	<i>33</i>
<i>'Action Science' and double loop Learning.....</i>	<i>35</i>
<i>The nature of management learning in business schools</i>	<i>37</i>
<i>Engendering 'higher level' learning; Critical Management Studies... </i>	<i>40</i>
<i>The rise of knowledge over practice</i>	<i>41</i>
<i>What does critical reflection entail?</i>	<i>43</i>
<i>Critical pedagogy in action.....</i>	<i>45</i>
<i>Pragmatist conceptions of critical management education.....</i>	<i>49</i>
<i>Wherefore Criticality or even criticality?</i>	<i>50</i>
<i>Entrepreneurial learning.....</i>	<i>51</i>
<i>Action learning</i>	<i>53</i>
<i>Examples of action learning in practice</i>	<i>57</i>
<i>Alternatives to 'traditional' action learning.....</i>	<i>58</i>
<i>Criticisms of action learning.....</i>	<i>60</i>
<i>So how should managers learn?</i>	<i>61</i>
Chapter Three. Research methodology	63
<i>Introduction</i>	<i>63</i>
<i>Situating myself in the research.....</i>	<i>64</i>
<i>The research framework.....</i>	<i>64</i>
<i>What is ontology?</i>	<i>65</i>
<i>What is epistemology?.....</i>	<i>68</i>
<i>Positivism.....</i>	<i>68</i>

<i>Labelling the philosophical approach of this study</i>	70
<i>Social constructionism</i>	71
<i>Constructionism/constructivism?</i>	73
<i>Ethical considerations</i>	74
<i>Reflexivity</i>	77
<i>The researcher's role in developing theory</i>	80
<i>Research design</i>	82
<i>Methods of data collection</i>	83
<i>Learning journal</i>	83
<i>Participant observation</i>	84
<i>Interviews</i>	85
<i>Collecting qualitative data</i>	86
<i>Methods of data analysis</i>	87
<i>Discourse analysis</i>	87
<i>Analysing narrative accounts</i>	89

Chapter Four. Action learning in practice: data reporting and analysis 93

<i>Introduction</i>	93
<i>Learning sets</i>	93
<i>Learning set 1: Leafy Cheshire</i>	93
<i>Learning set 2: Not so leafy East Lancashire</i>	98
<i>The Facilitator's role</i>	102
<i>Individual learner accounts</i>	104
<i>(i) Non reflective learning</i>	104
<i>(ii) Learning as mutual support and business growth or survival</i>	107
<i>(iii) Learning as confidence and identity building</i>	110
<i>(iv) Learning as a reality check</i>	112
<i>(v) Learning as finding courage</i>	115
<i>Identifying learning at 3 levels</i>	118
<i>Level one learning</i>	119
<i>Level two learning</i>	120
<i>Level three learning</i>	121

Chapter Five Methodological reflections 123

<i>Introduction</i>	123
<i>Learning, researching, 'sensemaking' and storytelling</i>	124
<i>Language as epistemology</i>	129
<i>Situating my subjects in the research: Reflection and reflexivity in learning</i>	132
<i>Language as ontology</i>	131
<i>Radical reflexivity</i>	132
<i>Social poetics exemplified</i>	134
<i>Social poetics as therapy</i>	137

Chapter Six. Discussion	139
<i>Introduction</i>	139
<i>Learning and the co-creation of meaning: practical authorship</i>	140
<i>Identity and self efficacy.....</i>	143
<i>Action learning exemplified.....</i>	145
<i>Level one: Non-reflective learning</i>	147
<i>Level two: Abstract learning.....</i>	148
<i>Level three: Learning as confidence and identity building and as reality checking</i>	149
<i>Level four: Learning as finding courage.....</i>	151
<i>Critical reflection</i>	152
<i>A summary of the theory building process.....</i>	153
<i>Reflection and critical reflection in learning.....</i>	156
<i>Critical or <u>critical</u>?.....</i>	161
<i>Radical reflexivity.....</i>	164
<i>Social constructivist and social constructionist approaches to learning</i>	166
<i>What can action learning offer to learners and developers?.....</i>	168
<i>The 'facilitative' turn in education.....</i>	170
Chapter Seven. Conclusions. management learning in business schools.....	172
<i>Introduction</i>	172
<i>The Research Questions</i>	173
<i>Where are business schools going wrong?</i>	174
<i>The contribution of action learning.....</i>	181
<i>The relationship between knowledge, learning and practice</i>	185
<i>The future of the business school curriculum?</i>	187
<i>'Soft' skills and 'hard' knowledge</i>	190
<i>Where now?.....</i>	191
References.....	192

List of Figures

	Page
Figure 1: The reflection process in context	31
Figure 2: Bateson's levels of learning	34
Figure 3: Crotty's research scaffold	65
Figure 4: Network of Basic Assumptions Characterizing the Subjective-Objective Debate within Social Science.	67
Figure 5: The Role of the Researcher.	81
Figure 6: Modes of Learning	147
Figure 7: Modes of Learning: types of reflection	153

Glossary

CIPD. Chartered Institute of Personnel and Development

CMS. Critical Management Studies: an attempt to radicalise and politicise the management curriculum and to engender new ways of conceptualizing and problematizing managers' roles and work.

CPD. Continuing Professional Development

FE. Further Education

HE(I). Higher Education (Institution)

QAA. Quality Assurance Agency for Higher Education; the agency responsible for defining and encouraging the continuous improvement of academic standards and quality.

RAE. Research Assessment Exercise: a quality assessment of the research output of university departments which provides information for the HE funding councils

SME. Small and Medium Sized Enterprises

TQM. Total Quality Management; a management approach aimed at ensuring customer satisfaction based on the participation of all members of the organisation.

Introduction

It is clear that the 'business school business' (Pfeffer and Fong, 2004) is at a crucial phase of its development. Critics of university business and management schools cite an unhealthy emphasis on revenue creation coupled with the adoption of a consumerist culture (Grey and Mitev, 2004); the notion that management research largely ignores practitioner interests and concerns (Pfeffer and Sutton, 1999; Pfeffer and Fong, 2002; Bennis and O'Toole, 2005), and some also accuse business schools of failing to educate managers in a meaningful and useful way (Thorpe, 1990; Mintzberg, 2004). It could be argued that all these factors should be considered holistically as each has a significant impact on the others. The tendency so far in the literature, however, has been to examine them as separate phenomena and this study attempts to follow this trend in that it is concerned with the way in which business schools engage with and provide management learning. However, it is impossible to ignore the knowledge and consumerism debates which become recurring themes.

Starkey and Tempest (2005) conceive of the business school as a pluralistic meeting point in much the same way as Burgoyne and Jackson (1997) imagine management education in their 'arena thesis':

'The business school has a major role to play in knowledge generation and reconfiguration by providing a meeting place in which the different discourses of business and society can confront each other. To achieve this goal requires conceiving of the role of the business school in terms of the interconnectivity of different modes of knowledge and a range of different social actors to produce the new models we need to navigate the risk society'.(Starkey and Tempest, 2005: 424)

Managers as learners must rank highly in Starkey and Tempest's list of 'social actors' and of course, knowledge has a role to play in the education of managers, but it seems that the centrality of knowledge in the management research and profession debates can distract from the more prosaic and equally pressing issue

of how business schools should be involved in ensuring that managers in the United Kingdom (and beyond) are adept and thoughtful rather than merely qualified. Burgoyne (1994:36) suggests that as management developers, we need to question the underlying theories, models and frameworks that we apply in our practice. There are two main areas with which we should concern ourselves; the nature of management and the assumptions and beliefs about how people learn. Here, I am concerned with the nature of management learning in the UK's business schools so, ostensibly, I deal with the second of Burgoyne's areas but I propose that as learning is at the core of the management task, indeed, Burgoyne himself (1994:35) argues that managing *is* learning, it is difficult to separate it from the first.

An in-depth examination of the nature of management or the ways in which it can be conceptualised is not within the scope of this study. However, I need to state at the outset that this study is based on the premise that management is more about *being* rather than *knowing*: *acting* rather than simply reading and reasoning, and as such, the way in which we educate managers has a profound influence on their practice. Reed (1989) differentiates this theoretical perspective on management from others by terming it 'management as social practice' as opposed to the more recognisable technical, political and critical perspectives on management. With this in mind, a social constructionist and relational view of management is an underpinning concept of this piece of work, with its focus on how management is learned.

Whilst social constructionist approaches to management research are increasingly accepted in the management academy, there is little evidence to suggest that social constructionist approaches to learning about management exist in the UK's business schools. Here, I seek to provide a rationale for the introduction of teaching and learning strategies based on a social constructionist philosophy; action learning is an example of such an approach which embodies the principles of critical reflection, sensemaking and the co-construction of meaning. I do not advocate that action learning should be introduced across the board; rather that more attention is paid to those elements of learning to *be* a

manager and perhaps to spark a more mainstream debate about the knowledge-based pedagogical philosophy which our business schools, often unconsciously, adopt.

There are many reasons why business schools sleepwalk their way into this 'knowledge-banking' (Freire, 1972) approach to management education, but the predominant factor is undoubtedly the success of the Masters in Business Administration. Success, that is, in terms of attracting income to universities by offering a product which promises to turn learners into alchemists. The MBA exemplifies the preoccupation of management teachers (and therefore learners) with 'knowing about' management; the typical MBA pedagogy is based on the collective, normally tacit, agreement that learners accept codified and normative theories in an unquestioning and passive manner.

Action learning approaches are offered as the antithesis of this formulaic, compartmentalised MBA approach to learning management. The idea is not new; McLaughlin and Thorpe (1993) and Willmott (1994) suggested fifteen years ago that action learning be adopted in business schools. Willmott sees it as the pedagogical vehicle for a curriculum based on Critical Management Studies; McLaughlin and Thorpe (1993:26) offer it as one of a range of conceptual frameworks or 'tools for thinking'. This study addresses both of these propositions and also explores a more pragmatic view of the (small 'c') nature of criticality in management education most notably advanced by Watson (2001).

At the core of this debate about small 'c' or large 'C' criticality is the concept of critical reflection. Critical Management Education (CME) offers a curriculum which is based on a politicised view of management and managerialism; this collection of writing in the critical tradition provides the basis of the questioning of learners' assumptions in CME. Reynolds' (1997, 1998, 1999) five principles of critical reflection are explored here and in particular, the role of critical reflection in engendering 'higher level' learning (Fiol and Lyles, 1985). Rather than adopting or creating a dedicated knowledge base, the small 'c' notion of criticality, emphasising Reynolds' focus on social learning, uses the personal and collective

experience of learners as the basis for questioning.

There are few accounts of action learning being used in Higher Education. Therefore, a large-scale action learning project in the Small and Medium-sized Enterprise sector was chosen as the site of study. Here, pragmatism is valued over knowledge although this is not always necessarily a virtue, as it can lead to short-termism and reactive management, with dire consequences. There may well be a place for a management development initiative which emphasises knowledge development in the SME sector, but that is not the point here. Rather, I am concerned with what the university sector can learn from the SME sector, given the apparent lack of pragmatism in the management curriculum and the growing literature around the social nature of SME learning. The current trend to encourage knowledge transfer from academia to industry is therefore reversed, in the spirit of learning from and in practice.

Chapter One

Management education, learning and development

Introduction

Chapter One sets out the broad context of the study and examines the debate surrounding the nature and purpose of management education in the UK's business schools which is inextricably entwined with the notion of management as a profession and the nature of management knowledge. It sets out a chronology of enquiry into management education, emphasising the accepted wisdom that universities are viewed as being at the cutting edge of the creation of knowledge about management and the ideal site for the education of managers.

Management development and management learning.

Management development is used here as a broad term to encompass all attempts to improve managerial performance; the discussion of management education focuses more specifically on the activities of Higher, and some Further Education Institutions, in teaching practising and aspiring managers. As the study is based in the UK, it commences with a brief examination of UK government policy and an examination of the link between management education and practice, which many continue to believe is unproblematic, despite writers such as French and Grey (1996) disputing this link.

The evidence presented in this chapter supports the notion that business school or business school type education fails to change managers' behaviour in a profound and meaningful way. It includes a discussion of the arguments against

the MBA which serves to exemplify everything that is instrumental, objectified, normative and reified in management knowledge and education. This is not to say that the business school 'industry' is not alive and well, attracting undergraduates and postgraduates alike.

This chapter seeks to address these issues and to examine the effects of an inconsistent governmental approach to management development coupled with a management academy seeking to define its own agenda, on the practice of management development in the UK. The main problem is defined as the proliferation and popularity of normative approaches to management education and development which encourage managers to embrace a pre-determined identity rather than form and explore their own. Chapter Two then goes on to highlight the dearth of alternative approaches to management learning: approaches which are founded on the principles of critical reflection as a way of helping managers to learn in a profound and transformative manner.

The term *management education* is used to describe those activities aimed at providing learning opportunities for managers mainly by Higher Education Institutions. This definition is unproblematic and generally well understood and consistently used in the literature. The meaning of the phrase *management development* is much more indeterminate. Cullen and Turnbull (2005:336) offer the following definition:

'Management development is a metafield that emerged from a range of disciplines (primarily, though not exclusively psychology, social science and management studies), which either attempts to frame the reality of management or reframe the reality experienced by managers, with the aim of contributing to the personal resource base of managers and/or the intellectual capital of organizations'.

For Thomson *et al.* (2001:10), the term encompasses:

'The different ways in which managers improve their capabilities. It includes management education ... and management training ... But our use of the term 'development' goes beyond the sum of these to mean a wider process ... which includes informal and experiential modes of human capital formation'.

Mumford (1997:6) suggests:

'An attempt to improve managerial effectiveness through a learning process'.

Burgoyne (1988:40) offers:

'I define 'management development' as the management of managerial careers in an organisational context'.

From these definitions, it can be seen that there is a range of ways in which management development can be conceptualised. It can either be thought of as learning which benefits the individual, the organisation or both concurrently, where 'learning encompasses notions of output or process. Management development is usually discussed as a subset of human resource development (HRD)' (Fox, 1997). The practice of management training, a term which is now infrequently used, is subsumed by management development.

Management learning is an attempt to bridge the gap between the theory and practice of management education and development (Fox, 1997) but it is most recognisable as the academic discipline which covers the study of management development and education. Management learning has come of age over the past few years; now recognised in the Research Assessment Exercise (RAE), it has grown as a result of the work produced by a number of academic departments and has spawned the creation of several dedicated departments, the most notable of which is at Lancaster University.

A chronology of management education and development policy

Although some efforts were made by successive UK governments throughout the 1960s and 1970s to regulate and elevate the status of training and development in general, little was specifically targeted at managers. By the 1980s the state of British management education and training became a matter for public concern,

debate and action (Reed and Anthony, 1992). Mangham and Silver (1986:12) identified the lack of provision for managers:

'It is clear that a significant proportion of the management cadre in the United Kingdom in 1985 received no formal training of any kind in the skills which many of them, and virtually every critic of our economic performance, regard as important to the nation's success'.

Two significant reports were published in 1987, both reviewing the parlous state of British management education and development and suggesting a way forward. Handy's (1987) 'The Making of Managers' provides a review of management education and development in competitor countries (USA, West Germany, France and Japan). The main conclusion from this review is that Britain did not have a clearly signposted and accepted education and development process for managers, unlike other nations who, although different in each of their approaches, had some kind of structure.

'There can be little doubt that, by comparison with the other countries in this study, Britain has neglected her managerial stock'. (Handy, 1987:13)

The report suggests taking, 'a series (of approaches) based on the best in each of the four countries *which* adds up to a list of ten things which Britain should aim to do'. The most far-reaching recommendation is the creation of a two part MBA, 'part 1 becoming a customary requirement for recruits to larger companies' (p.17).

The recommendation which gained the most publicity and resulted in a persistent change to management development in the UK, was the creation of a Charter Group which eventually became the lead body for management qualifications under the National Vocational Qualifications (NVQ) regime. It is in this area of vocational qualifications that the Handy Report has had the most influence. Although, as Easterby-Smith and Thorpe (1997) point out, it has mainly been at the lower levels of management education, the higher levels still remaining firmly under the control of universities in the shape of undergraduate and postgraduate programmes.

Constable and McCormick's (1987) *The Making of British Managers* follows Handy's lead of suggesting that qualification courses should be a major component of any future management development agenda. The lack of a widely used and clear system for educating and training managers puts the UK at a disadvantage. The authors of this report advocate the adoption of a Diploma in Business Administration:

'Subjects would include (all at a basic level) accounting and finance, interpersonal skills, management of people and industrial relations, economics, statistics and quantitative techniques, computing and information systems, marketing and the management of operations'. (Constable and McCormick, 1987:19)

The Diploma would be aimed at the 21-25 age range and would be different to the traditional Diploma in Management Studies in that the syllabus would not be so extensive. These recommendations chime well with Handy's 'two part' qualification solution.

Whilst both of these reports highlighted the need for the UK to take the training, education and development of managers more seriously, the proposed solutions lie in putting managers into a classroom to be force-fed a diet of academic subjects. This is despite Constable and McCormick's research on in-company provision, employer perspectives and private sector activity. Both Constable and McCormick (1987) and Handy (1987) seemed to be looking for a rationale for reforming management education (i.e. the provision of management qualifications) without sufficiently examining the role of managers, and their present and future needs and expectations. The creation of the Council for Management Education and Development and the Management Charter Initiative meant that the profile of management development was raised.

The fact that many of the other recommendations translate into the maintenance (or growth) of the universities' stake in management development appears somewhat self-serving; it is certainly deleteriously narrowly focussed. A legacy of the 1980s debate about management development is that discussions still centre on curriculum and focus on supply rather than demand.

Where are we today?

Estimates about the number of managers in the UK vary significantly. This is mainly due to lack of a common definition of what a management role is (e.g. is a first-line supervisor a manager?) According to Williams (2002) there are between 2.5 million and 6 million managers in the UK but 'most likely' around 4 or 4.5 million, although a justification for this likely figure is not given. Perren and Grant (2001) report that SME's represent over 52% of the UK's total turnover (excluding finance); they employ over 56% of the UK workforce and have over 1.75 million managers within them.

A figure which is often quoted (see, for example, Harrison, 2005) from the Council for Excellence in Management and Leadership (CEML) is that 36% of organisations believe their managers are not proficient. However, the author of the report containing this statement (Williams, 2002) advises that it be treated with caution in that it may not necessarily reflect the reality of managerial performance in the field. It makes a good headline for those wishing to raise concerns about the state of UK management development. Williams (2002) also reports that 24% of managers are qualified to degree level, compared to 65% for the professions.

There is a perceived need, emanating mainly from government and academic circles, for management to be taken more seriously. Government policy concentrates on the links between effective management and business growth:

'A key factor in the success of any company, especially one that is innovating and growing, is the quality of its management and leadership. Innovative ideas are often the vision of inspired leaders'. (Department for Trade and Industry website, 2007)

The UK government has invested significant funds in investigating what constitutes 'good' management, analysing the current state of management development and the formation of the Council for Excellence in Management and

Leadership in 2000. CEML's stated purpose was to develop a strategy 'to ensure that the UK has the managers and the leaders of the future to match the best in the world':

'The Council was asked to look at both management and leadership; to consider the public and the private sectors; and to look at demand for management and leadership development - and its supply - through business schools, Further Education colleges and private providers'.
(Extract from CEML website, 2002b)

The main outcome of CEML's work is a strategy which has three strands:

- To improve demand for management and leadership development from both organisations and individuals
- To improve supply and delivery of management and leadership skills by proposing reforms to the supply of education and training, beginning in school and going right through an individual's working life
- To see a step-change in the linkage between demand and supply.

The ways in which these outcomes will be achieved are numerous and include the development of a National Framework of indicators of the UK's leadership and management capability as a way of exemplifying the link between productivity and performance; urging the Economic and Social Research Council (ESRC) to encourage research into the productivity-leadership relationship; a toolkit for companies to assess their management and leadership capabilities; dissemination of good practice through Investors in People; stimulation of demand in small businesses; implementation of a 'demand-led' approach for entrepreneurs; all undergraduates to acquire management and leadership skills; management and leadership skills to be included in any Level 2 or above qualification; leadership development for MBA students; improving Continuing Professional Development (CPD) for management teachers and mechanisms for transferring leading-edge research into teaching. The final recommendation, concerned with 'making it happen' is the establishment of a strategic body for management and leadership by government to set targets, identify priorities, monitor changing levels of demand and to report to government (CEML, 2002a).

Although plenty of useful data collection and analysis was carried out on behalf of CEML, little seems to have come to fruition as a result. A further review, this time of skills in general in the UK, carried out by Lord Leitch was published in 2006 (HM Treasury, 2006). Leitch has a wider remit than CEML in that his team have assessed skill shortages in general. However, the link between productivity and performance is again emphasised, as is the need to be world class. As in the CEML report, there is little discussion of how workers (including managers) should experience development in a way which makes it meaningful and enduring for them. There is an assumption that if it is 'demand-led' then it satisfies needs; but where does the need for real and transformative learning come in? How do managers know what their needs are so that they can 'demand' that they be fulfilled? Both these reports fail to 'drill down' into the question of the learning experience.

Another government attempt to diagnose the UK's management ills was published by the DTI. Their report on 'Inspired Leadership' published in 2005 suggests that the single most important factor most people would like to see in their leaders is 'inspiration', with only 11% of the sample reporting that their leader had this 'ability to inspire'. The two top attributes are 'knowledge' and 'ambition'. The DTI report (2005) offers six essential elements of 'inspirational leadership':

- Genuinely care about people
- Involve everybody
- Show lots of appreciation
- Ensure work is fun
- Show real trust
- Listen a lot.

Although there may be some truth in the suggestion that employees respond to caring managers, the creation of a list of qualities needed does not necessarily

mean that it will be fulfilled; without an explanation of how it can be achieved, it is little more than a wish list.

In summary, the UK government's approach to management and leadership development over the last 30 years has been prescriptive and predictable; targets may be reached but they do not necessarily reflect real learning. Successive governments have shied away from regulating management training, political expediency favouring voluntarism and therefore little change. There seems to be a great deal of research with few real outcomes. There is also an assumption that academics are best placed to research into management education, even though this can hardly be described as an objective exercise. The relationship between knowledge, management practice and improved performance seems to be a 'given' yet there is little evidence to suggest that this is truly the case.

The relationship between management knowledge and practice

We could conclude from the DTI's 'Inspired Leadership' list of essential qualities (DTI, 2005) that knowledge has become a second-order attribute for the successful manager. Academics would of course argue against this, as would many qualified managers. There are two issues here: the status of management as a profession, given the central role of knowledge in defining a profession, and the way in which management research should contribute to the improvement of management practice.

Management as a profession

There is a lively debate both in the management academy and amongst practising managers about the so-called professionalisation of management, and in particular, of management education. Historically, the three 'learned' professions of divinity, law and medicine were the most recognised areas in which a body of knowledge contributed to practice and were seen as the 'true'

professions, with the military coming a poor fourth. More recently, the term has begun to encompass any 'calling or occupation by which a person habitually earns his living' (OED online, 2006).

So is management a profession? Andrews (1969:50) offers five criteria against which the professional quality of any occupation may be judged:

- A body of knowledge which has been subjected to disciplined analysis
- The competent application of that knowledge
- A degree of social responsibility
- Standards of conduct set and controlled by the membership of that profession
- Individuals and segments of society served by the profession grant its practitioners respect, authority and considerable freedom to pursue their practice.

Handy (1987:16) is scathing about the lack of professionalism afforded to management, comparing the UK unfavourably with the French tradition of recognising and educating a management 'cadre'. For him, the lack of formal education is at the root of the problem:

'For no other important role in life, other than parenting ... (is there a lack of) ... any proficiency test, any preparatory education or early apprenticeship'

Unsurprisingly perhaps, the main focus of discussion for academics around management as a profession is on the knowledge element of the criteria. Indeed, the attempts to professionalise management through educational reform in the 1980s (Reed and Anthony, 1992) are already described earlier in this chapter.

Spender (2005:1282) refers to a profession as 'a group of people whose practice is shaped by training and credentialing against a rigorous body of knowledge'. His concern is with the legitimacy of the body of management knowledge and how this is delivered in business schools ('the theory-practice gap'). Indeed, many academics are concerned with the role of the business school in defining and regulating the body of knowledge underpinning 'professional' management practice (Grey, 2001; Starkey and Madan, 2001; Pfeffer and Fong, 2004; Starkey

et al. 2004). The extent to which they are concerned with how this theory relates to practice differs widely. In the UK at least, there is a perceived need amongst management academics to prove their credentials as members of a profession at the university level, where management is often seen as an area of vocational study. The practice element of management and particularly how management research informs and develops practice in the 'real world' is superseded by the need of some professors of management to have themselves taken seriously in the university at large. As Squires (2001) points out, professions constitute themselves both epistemologically and socially; they are bodies of knowledge and bodies of people. For Willmott (1994:115) this 'body of people' is narrowly constituted for management academics:

'The most 'significant other' for management academics - in terms of identity, self-esteem and career - are those working within the same (sub) discipline. Students, employers and other academics are much less significant'.

One school of thought argues that the relationship between Mode 1 and Mode 2 knowledge is important and that both are necessary to healthy social science (Gibbons *et al.*, 1994; Nowotny *et al.*, 2001; Starkey and Madan, 2001). Mode 1 knowledge (M1K) is created by using scientific approaches and is characteristic of the knowledge produced by universities. Mode 2 knowledge (M2K) is more 'socially accountable and reflexive' and more practitioner orientated both in its production and its intended market (Gibbons *et al.*, 1994). Prompted by this new conceptualisation of knowledge, there has been some discussion about whether managers as 'users' and stakeholders should be an integral part of its production, dissemination and readership and what the role of business schools should be (Starkey and Madan, 2001; Bennis and O'Toole, 2005).

The role of the business school in creating management knowledge

Starkey and Madan (2001) and Pfeffer and Fong (2004) offer a view of the future of the business school, the former from a UK perspective, the latter from the US. Starkey and Madan (2001:S5) question the role of the business school in terms

of producing research which is relevant to management practice. They suggest four pressures for change from a Mode 1 to a Mode 2 knowledge approach:

1. The demand for more relevant knowledge from increasingly critical and sophisticated stakeholders in higher education, both public and private sector
2. Increasing competition among universities for students and for lucrative post-experience education and training coupled with increasingly demanding customers
3. Critical reflection among academics themselves about their role in an increasingly demanding and complex world
4. Radical innovations in information and communication technologies.

The relevance of knowledge created by business schools is also called into question by Pfeffer and Fong (2002) who cite Porter and McKibbin's (1988) view that business school curricula were seen as too focused on problem finding as contrasted with problem solving and implementation. If, as Pfeffer and Fong (2002:80) suggest, the role of a business school is to 'impart knowledge and influence the practice of management' then teaching becomes the primary medium through which knowledge is imparted. I have already commented on the fact that management academics tend to write for themselves; their work is often directed at their particular discipline or sub-discipline and often written in a self-referential and a difficult-to-access style. This assumption is corroborated by Pfeffer and Fong's (2002) analysis of *Business Week's* business book best seller lists, in which few books written by academics feature.

Both government and academia seem concerned with professionalizing management through the creation of a 'body of knowledge'. The government's approach is vocationally-biased whereas universities are mainly concerned with creating knowledge which is acceptable in a research assessment exercise in order to secure funding, tenure and promotion.

Starkey and Madan (2001:S3) suggest that

'Business is increasingly concerned with relevance, while business and management researchers in universities cling to a different view of knowledge. Business and management researchers stand accused of a lack of relevance to managerial practice and of too narrow a discipline base'

They go on to cite the Industry-Academic Links report (Higher Education Funding Council for England, [HEFCE] 1998) which found that:

- 'Users believe that research can benefit them but do not regard many research topics as focusing on key areas of relevance;
- Some managers do not feel that research contributes directly to their managerial role. Their perceived need is for prescriptive statements about best practices and actionable advice rather than reflexive analysis
- User communities lack awareness of the results of research. Management researchers also lack systematic and effective methods of disseminating their findings to many of these communities'.

As Grey (2001:S29) suggests, successive governments have sought to make universities more 'enterprising' and commercial. He believes that this approach encourages universities to produce 'commercially usable knowledge' which may ultimately lead to the complete demise of the business school, as it will be difficult to differentiate them from commercial research companies. He argues that the 'production of useless knowledge is a public good because it is the price to pay for the possibility of producing useful knowledge'.

The production of this so-called 'useless' knowledge is a source of significant income to business schools through the Research Assessment Exercise. Starkey and Madan (2001:S8) report:

'An almost irresistible trend to apply a US yardstick to the assessment of research quality in the tendency to view publication in leading US management journals as synonymous with research excellence'.

Academics are concerned for their careers if their work is not published in 'top rated' journals, regardless of whether the work helps to progress or question the practice of business and management in the community which our universities supposedly serve. The body of management knowledge on which the future of

the profession lies is therefore open to a number of political and economic pressures.

There are also concerns about the lack of engagement with practising managers in the creation of this knowledge. Pfeffer and Sutton (1999:92) discuss the tendency of academics to 'conceptualize knowledge as something tangible and explicit that is quite distinct from philosophy or values' and that in ignoring the situational nature of knowledge production, tacit knowledge is not made explicit. Pfeffer and Fong (2002) argue that problem-orientated research is better than theory-orientated research but that little of the former is carried out (Lawrence, 1992). They also cite Bailey and Eastman (1996):

'Argyris argues that for scholars to produce knowledge that is "actionable" they must capture in their research the conditions experienced by the practitioner'.

which echoes Pfeffer and Fong's call for problematizing management. Spender (2005) claims that problems in management education arise because of the tensions between the various types of managerial knowledge. He singles out the division between the analysis of the decision process and the decision content in management knowledge creation and dissemination (through management education) in leading to decontextualization and abstraction. He also regrets the loss of the tacit dimension in management knowledge and education.

Bennis and O'Toole (2005) propose that the reason for management faculty focusing on scientific research is that business is seen as an academic discipline when it is actually a profession. Schools working on a professional basis actively engage with the outside world (e.g. medicine and law) whereas purely scientific disciplines such as chemistry or geology are largely self-referential. In professional disciplines, papers published in practitioner journals have equal kudos to those in scientific journals. Pfeffer and Fong (2002) also advocate the adoption of a professional model for much the same reasons as Bennis and O'Toole (2005). They provide a useful counterpoint to Grey's (2001) assertion

that useless knowledge can be useful by observing that the evolving norms of business school research mean that:

'Theorists often write trivial theories because their process of theory construction is hemmed in by methodological strictures that favour validation rather than usefulness'. (Weick, 1989: 516)

In short, scientific research does little to affect the practice of management or the reputation of business schools outside their own community. In fact, the ability of management academics to influence each other may also be increasingly in question. According to Bennis and O'Toole (2005:100), deans and tenure committees in the US report that the number of citations of articles written by candidates is 'dramatically lower than it was a decade ago'

Ghoshal (2005:75) contends that theories of management legitimize certain actions and behaviours of managers and de-legitimize others 'shaping the intellectual and normative order within which all day-to-day decisions (are) made'.

Whilst others mentioned here see the major problem as the weak link between management research and practice, Ghoshal (2005:76) points to 'ideologically inspired amoral theories' which are the product of the promotion of management research as a science and the need to prove 'causal determinism'. The link between theory and practice in the social domain is a double hermeneutic in that theories influence practice and managers adopt theorists' world views. Ghoshal is particularly scathing of Friedman in his assertion that:

'Few trends could so thoroughly undermine the very foundations of our free society as the acceptance by corporate officials of a social responsibility other than to make as much money for their stockholders as possible'. (Friedman, 2002: 133; cited in Ghoshal, 2005)

Ghoshal's message is clear in that he sees the lack of intellectual pluralism as a corrupting influence upon both management education and practice.

The MBA debate

The ongoing debate about the nature and utility of the MBA in the US is both content focused and strategy based (Giroux, 1981). Although it focuses on one educational programme, the dominance and supremacy of the MBA in the US and the global management education market means that its outcomes have relevance for the way we teach our managers in business schools generally. The basic premise for the arguments against the current state of the MBA is that management research largely ignores practitioner interests and concerns (Pfeffer and Sutton, 1999; Pfeffer and Fong, 2002; Bennis and O'Toole, 2005) and that faculty often have little experience of business except as customers. As a result, business school teachers teach 'what they know' (Bennis and O'Toole, 2005) which often has little relevance outside *Administrative Science Quarterly*.

Mintzberg (2004) is particularly scathing of MBA providers, students and the systems which surround them. He argues that management is neither a science nor a profession but a 'practice'. He criticises the MBA for its content and its pedagogical approach, resurrecting the old joke that the acronym actually stands for *management by analysis* (p.36) to the exclusion of soft skills development and any discussion of the ethics of being a manager. He dismisses the claim that business simulations replicate the real-world environment as 'patent nonsense' (p.44) and that the case study method reduces management to decision making and analysis, ignoring the tacit dimension of managing (p.52). This leads to a 'secondhandedness' or 'thirdhandedness' in learning (p.56) which does nothing to prepare students for the realities of managing a business.

So why does the MBA remain so popular? Undoubtedly because business schools and universities in general have an economic vested interest in its success: management and business schools have become the cash cows of modern universities. The higher a school climbs in the MBA ratings, the higher the fee it can charge, the brighter the student it can attract and the higher a salary

that student can ultimately earn. Everyone wins. Why should we reveal the emperor's lack of clothes? As Mintzberg (2004:79) asks,

'The object is learning, developing more thoughtful people who can improve the practice of managing ... Who is measuring that?'

Gosling and Mintzberg (2004) suggest seven tenets upon which true management education should be built:

1. Management education should be restricted to practising managers, selected on the basis of performance
2. Management education and practice should be concurrent and integrated
3. Management education should leverage work and life experience
4. The key to learning is thoughtful experience
5. Management development should result in organization development
6. Management education must be an interactive process
7. Every aspect of the education should facilitate learning.

Mintzberg and Gosling (2002) propose their International Masters Program in Practising Management as an antidote to the MBA, incorporating thoughtful reflection at the core of the learning experience. They have developed a programme that incorporates experiential learning. Such a programme is unlikely to be replicated in business schools on a wide scale due to the type of skills needed to implement this approach to learning which do not broadly exist and, if they did, would probably not be rewarded:

'A few years back, the curriculum committee of a highly regarded B school considered a proposal for a multidisciplinary first-semester MBA course based on the current challenges of a well-known global corporation. The committee rejected the proposal – but not because it was poorly designed or pedagogically flawed ... The problem, in the words of one faculty member, was that "we are not qualified to teach it"'. (Bennis and O'Toole, 2005:102)

The purpose of this study

So far, in this introduction, I have documented a number of successive governments' perfunctory attempts to influence the quality and extent of management development and the obsession which business schools have with knowledge rather than practice or learning. Against this backdrop, this research sets out to explore where the possibilities might exist for new pedagogical developments within business schools, particularly those underpinned by social constructionist approaches to learning. Rather than examine current practices in HEI's, I have instead chosen to study how owner-managers in the SME sector experience learning. The reasons for this are twofold; first, there is little evidence from the literature to suggest that any attempt to introduce a social constructionist philosophy to teaching and learning is ever more than partial; that is, these approaches are only ever implemented in an *ad hoc* fashion by interested academics on specific programmes. Second, person-centred learning approaches are growing in number in the SME sector and there is an increased amount of evidence to suggest that, when used, they can be successful in developing owner-managers and their businesses (See for example, Devins and Gold, 2002; Rae, 2004; Clarke *et al.*, 2006).

However, a rich literature in the form of Critical Management Studies already exists which has been a significant influence on new approaches to developing managers in business schools. This work cannot be ignored and, although it is still marginal, it has been important in making an impact on the way in which management learning is conducted. As a consequence, I will explore the place of Critical management pedagogy within a social constructionist framework. Although there is a significant literature on the nature of reflection in learning, little empirical evidence exists that focuses on how reflection, in its many forms, is enacted and experienced by learners. As a consequence, an additional objective of this study is to exemplify *reflection* and *critical reflection*.

My research questions are:

1. How do managers in the SME sector experience a social constructionist approach to learning?
2. How might the nature of reflection and critical reflection in management learning be exemplified, conceptualised and communicated?
3. What role does Critical management pedagogy have within a social constructionist philosophy?
4. What potential exists for social constructionist approaches to make a contribution to learning in business schools?

Chapter Two

Exploring the nature of learning and reflection

Introduction

One of the main implications of the debates set out in Chapter One is that too little attention is paid to the nature of learning itself both by governments attempting to improve managerial performance and by business schools attempting to teach students. This chapter sets out the leading ideas about learning and reflection, particularly the nature of 'higher level' learning (Fiol and Lyles, 1985) and criticality.

Following on from the discussion in Chapter One about the nature of management knowledge and the political forces which shape its creation, I examine how managers learn and how that learning might influence practice. Critical reflection is at the heart of this theory-practice conundrum and in university curricula, criticality finds its basis in Critical Management Studies (CMS). The nature of 'Critical' or a pragmatist 'critical' management education is considered here and an exploration of the literature leads to the conclusion that there is a need to examine the utility of CMS in this context.

Action learning, based on a CMS curriculum, has long been held up as the answer to the lack of a critically reflective element in management (McLaughlin and Thorpe, 1993; Willmott, 1994) in providing an antidote to formulaic and normative modes of management learning. Yet there is little evidence to show that it has fulfilled its promise. The chapter concludes with an examination of action learning.

How do managers learn to manage?

'Learning' is a term which is increasingly used in everyday language. Successive UK governments have emphasised the idea of 'Lifelong Learning' in an attempt to encourage members and potential members of the workforce to become involved in education and training. Similarly, the terminology used in schools now has much more of a focus on 'learning' as opposed to 'education'. The notion of learning, used in these contexts, embraces the idea of the learner becoming much more active in the process of gaining new knowledge or understanding rather than being the passive recipient. Whether or not this is actually the case in the examples cited, is open to discussion.

Learning is a psychological concept, imbued with behaviourist concepts; Bass and Vaughan (1966:8) offer a typically outcome-focused definition, 'Learning is a relatively permanent change in behaviour that occurs as a result of practice or experience'. Central to this definition is that learning persists and is not due to some temporary (probably physical) condition and that learning only occurs when there is an observable change in behaviour. Traditional, classroom-based education and training courses are based on this principle that if learning has occurred, we should be able to see and measure the effects of it. Furthermore, we can manipulate conditions and experiences to ensure that individuals and groups exhibit the desired terminal behaviour. This approach evidently ignores the role of individual and group cognitive processes and casts the learner as an unsuspecting and unthinking being, ready to be changed in whatever way is deemed desirable by the 'educator'. The literature suggests that cognitivist theories of learning, for example that proposed by Piaget (1932) which explain how humans (particularly children) store and process information and Kohlberg's (1986) theory of moral development, are rarely used in explanations and studies of management learning.

A humanist, cognitive approach suggested by Knowles (1990) provides a more accessible framework for adult educators. He makes certain assumptions about the way adults learn:

- **The need to know** — adult learners need to know why they need to learn something before undertaking to learn it.
- **Learner self-concept** —adults need to be responsible for their own decisions and to be treated as capable of self-direction
- **Role of learners' experience** —adult learners have a variety of experiences of life which represent the richest resource for learning. These experiences are however imbued with bias and presupposition.
- **Readiness to learn** —adults are ready to learn those things they need to know in order to cope effectively with life situations.
- **Orientation to learning** —adults are motivated to learn to the extent that they perceive that it will help them perform tasks they confront in their life situations.
(Based on Knowles 1990:57)

However, despite the fact that Knowles (1990) places the learner at the centre of his research, his work is essentially written for adult educators working in institutions with fixed agendas and more often than not, fixed learning outcomes.

This purposive focus in the theory is fairly consistent; learning is often linked with a set of outcomes, some more specific than others. This is particularly prevalent in management education wherein there seems to be a fixation on collecting and demonstrating evidence that 'learning' has taken place and that certain outcomes have been reached. It seems that despite a growing discussion amongst management academics about more humanistic approaches to educating management, subject benchmark statements (QAA, 2006) provide an overwhelming reason for outcome-based learning processes.

Kolb's theory of Experiential Learning

The most popular model of learning, in the sense that it is used as the basis of programme design in a range of management learning contexts, is Kolb's (1984) Experiential Learning Theory. Kolb (1984:21) draws on the theories of Dewey (1910, 1934,1958) Lewin (1951), and Piaget (1951,1968,1970a,1970b,1978) to develop an 'holistic, integrative perspective on learning that combines experience, perception, cognition and behavior'.

Experiential learning is therefore suggested as a theory which synthesises and builds on previous models rather than suggesting a completely new paradigm. The model is based on six propositions:

1. 'Learning is best conceived as a process, not in terms of outcomes' (p.26).
2. 'Learning is a continuous process grounded in experience' (p.27)
3. 'The process of learning requires the resolution of conflicts between dialectically opposed modes of adaptation to the world' (p.29).
4. 'Learning is an holistic process of adaptation to the world' (p.31).
5. 'Learning involves transactions between the person and the environment' (p.34).
6. 'Learning is the process of creating knowledge' (p.36).

Kolb's (1984) model is often merely presented as the familiar cyclical diagram which is frequently offered to learners in the form of Honey and Mumford's (1992) Learning Styles Questionnaire. However, Kolb's work goes much deeper than this, refuting behaviourist stimulus-response approaches to learning and portraying learners as sentient and aware of their environment. Individuals have personal learning styles shaped by their personality and experience. Learning is a four stage cycle of concrete experience, observations and reflections, formation of abstract concepts and generalizations and testing implications of concepts in new situations. Kolb (1984) sees these four elements as distinct stages in the

learning 'cycle': a continuous process through which we shape and re-form ideas and knowledge. Freire's (1972) rejection of the 'banking' concept of education whereby knowledge is 'deposited' by the teacher and the student receives, stores and files the deposits is fully supported by Kolb. Knowledge is not about outcomes which can be stored and retrieved as required; rather, it is created by a continuous process of reflection on the experiences of our everyday life. In this view of learning, the processes of action to reflection to conceptualisation and then analysis happen in discrete steps and learners may have control over this learning process. In the context of management learning, managers become 'practical scientists' (Pavlica *et al.*, 1997) engaging in a controllable and codifiable process:

'In the process of learning one moves in varying degrees from actor to observer, and from specific involvement to general analytic detachment' (Kolb, 1984:31)

Much of Kolb's work is theoretical, drawing on some common themes and presenting them as a holistic approach to re-conceptualising learning. His theory has had a major impact on the way that management training and development (and to some extent, education) is devised and delivered. Kolb's learning cycle is one of the most well-known illustrations in management education and development (Vince, 1998). Kolb offers an insight into learning as a process rather than a set of outcomes and his theory has changed the way in which many managers have experienced training and development by emphasising the trainee rather than the trainer as the prime source of learning.

Despite the popularity of the model amongst practitioners, it is increasingly subjected to academic critique. Pavlica *et al.* (1997) point out Kolb's (1984) negation of the social processes which are an inherent part of learning in his casting of the manager as an 'Intellectual Robinson Crusoe'; most empirical studies of management (e.g. Mintzberg, 1973; Stewart, 1997) portray managers spending much of their time communicating, very often on a face-to-face basis. Kolb's (1984) rather clinical view of learning as a deliberate and thoughtful

process does not reflect the reality of most managers' day-to-day lives.

Vince (1998:309) extends this critique to include five related issues:

1. 'Experience needs to be seen as constructed, shaped and contained by social power relations.
2. Complex and unequal relations around knowledge are constructed between people as an integral part of the learning process.
3. There is a need to focus on the here and now experience and the mirroring process between the people within the education environment and the organizations they represent.
4. Finding ways of working with underlying and unconscious processes, particularly defense mechanisms, is necessary.
5. Second-order or metaprocesses relating to each aspect of the cycle are included'.

This fifth point offered by Vince (1998:309) is of most concern to us here. He writes of learning as a 'metalevel', 'second-order' process, whereby

'We reflect on our reflections in a way that calls our process into question'

Boud's *et al.*'s (1985:13) critique notes that experiential learning pays insufficient attention to the process of reflection:

'While David A. Kolb's scheme ... has been useful in assisting us in planning learning activities and in helping us to check simply that learners can be effectively engaged ... it does not help ... to uncover the elements of reflection itself'.

Boud *et al.*'s (1985), Pavlica *et al.*'s (1997) and Vince's (1998) critiques of Kolb's experiential learning cycle all point towards two significant dimensions that may be missing in this model which seems to enjoy such widespread use and acclaim; namely the social processes involved in learning and the nature of reflection itself. The following section deals with the latter question-the nature of 'simple' and 'critical' reflection.

Reflection

Dewey (1933) is the reference point for most commentators on reflection. He defined reflective thought as:

'Active, persistent and careful consideration of any belief or supposed form of knowledge in the light of the grounds that support it and further conclusions to which it leads ... it includes a conscious and voluntary effort to establish belief upon a firm basis of evidence and rationality'. (Dewey, 1933:9. cited in Boud *et al.*, 1985)

Boud *et al.* (1985:19) pay much more attention to the affective processes involved in reflection:

'Those intellectual and affective activities in which individuals engage to explore their experiences in order to lead to new understandings and appreciations.'

The expression of feelings in the reflective process, whether this is done as a solitary or collective activity, is seen to be crucial by Boud *et al.* (1985) to enhancing learning through reflection. They place a strong emphasis on attending to feelings as a way of producing *rational* reflections on experience and for Boud *et al.*, reflection is directed towards a particular goal or set of outcomes rather than simply being thoughtful. They suggest that learners should work with emotions, find ways of setting them aside and/or retain positive emotional responses. They imply that positive emotions are useful in the process of reflection whereas negative responses should be disregarded as part of the process of the rationalisation of experience. This separation of negative and positive emotions seems rather arbitrary and subjective. However, this model of reflection gives a useful insight into how reflection may lead to changes a commitment to action in the light of a re-evaluation of experience.

Figure 1 (overleaf) depicts Boud *et al.*'s (1985) model.

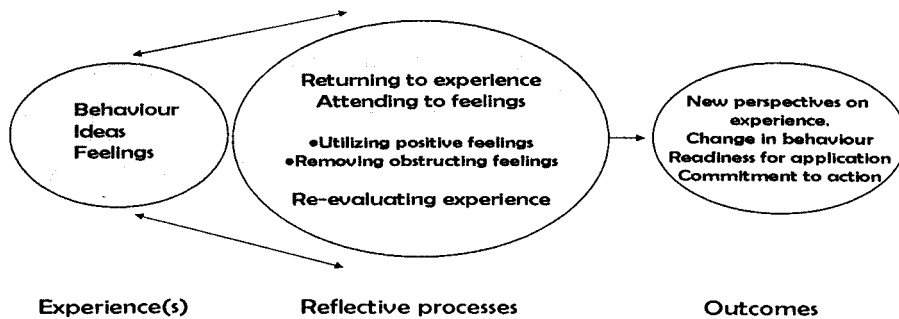


Figure 1. The Reflection process in context Reproduced from Boud *et al.* (1985:36)

According to Kolb (1984:38):

‘Learning is the process whereby knowledge is created through the transformation of experience’.

Central to this idea of knowledge creation is the process of reflection. Kolb's (1984) ideas on reflection are based on those of Dewey (1934) who discusses the need for individuals to question their habits or their routine way of operating when they do not function. Miettinen (2000:66-7) offers an explanation of the phases of reflective learning:

1. 'The indeterminate situation: the habit does not work

Reflective thought starts with some kind of disturbance; something makes the normal flow of action difficult ...

2. Intellectualization; defining the problem

An attempt to define what is wrong in the situation ...

3. Studying the conditions of the situation and formation of a working hypothesis

Analysis and diagnosis of the conditions; a tentative plan to resolve the problem is formed ...

4. Reasoning – in a narrower sense

'Thought experiments'; testing the working hypothesis ...

5. Testing the hypothesis in action

Do the intended consequences inherent in the hypothesis come about in practice? The hypothesis is not always confirmed, 'but the hypothesis makes learning possible, because the outcome can be compared to the initial suppositions implied in the hypothesis'.

Kolb's (1984) portrayal of reflection is retrospective and social; sensemaking is informed by one's own and others' ideas (Reynolds, 1998). Daudelin (1996:39) reports managers' tendency to avoid reflection because they place a higher value on action. She defines it thus:

'Reflection is the process of stepping back from an experience to ponder, carefully and persistently its meaning to the self through the development of inferences; learning is the creation of meaning from past or current events that serves as a guide for future behaviour'.

Schön (1983, 1987) rejects the technical-rational approach which views practitioners as 'instrumental problem solvers' applying well-defined solutions to well-defined problems. In reality, practitioners are solving novel problems in unique circumstances and they need to experiment and rethink previous practice in order to solve them. They have 'reflective conversations' with the situation: reflection entails much more than making thoughtful choices between courses of action (Reynolds, 1998). The main difference between Schön's (1983, 1987) and Kolb's (1984) work is that Schön portrays the learner as being far more engaged with the event or the problem rather than standing back from it. Experience and 'reflection-in-action' form the basis of new learning, according to Schön, by providing 'exemplary themes' (1987:68) and

'Students ... having to learn a kind of reflection-in-action that goes beyond storable rules not only by devising new methods of reasoning ... but also by constructing and testing new categories of understanding strategies of action and ways of framing problems'.(1987:39)

Schön's (1987:25) view of knowledge is characterised by 'knowing-in-action'; the knowledge which underpins everyday routines and habits which is often difficult to articulate:

'The knowing is in the action. We reveal it by our spontaneous, skillful (sic) execution of the performance and we are characteristically unable to make it verbally explicit'.

This 'knowing' is strongly linked to Polanyi's (1967) work on tacit knowledge, cited by Schön. It is significant in that it provides a theme for much of the further work on reflection and dialogue which is discussed later on in this thesis. Schön (1987) talks of meaning being mediated by a distinctive dialogue between student and coach and begins to raise awareness of the value of language in the co-creation of meaning in the learning situation.

'Transformative' learning

Cope (2003:432), building on Argyris and Schön's (1978) 'theories for action', defines 'higher-level' and 'lower-level' learning as

'Distinguishing between more practical, routine, adaptive learning and more fundamental learning that generates new understandings and new cognitive 'theories for action'.

Bateson's (1972) taxonomy of levels of learning (with additional comments provided by Vince, 1996) also provides a useful way of conceptualising the differences between different levels of learning. Level two suggests that students become conscious of new ways of approaching problems that are 'transferable' and useful to them in the future. Level three learning however challenges the whole way they conceive of situations and problems and often leads to what Engeström (2001) refers to as expansive learning. This is where individuals begin to gain completely new insights into problems and situations and embrace new possibilities. Figure 2 (overleaf) outlines these three levels of learning.

Levels	Implications
Zero Learning	Zero learning is based on predictable or specific responses which are not subject to trial and error. Zero learning does not signify the capacity to reflect in any way to enable change. It is simply about response. Even the recognition of a wrong response would not contribute to any future skill.
Learning 1	Learning 1 implies a change as a result of trial and error, within a set of alternatives. Correction does therefore have an implication for future action. In other words, this level has moved from stimulus/response to stimulus/response/reinforcement. Learning 1 is therefore about a process of habituation.
Learning 2	Learning 2 implies some flexibility in the potential to act as opposed to reinforcement of action. It is therefore a change in the set of alternatives from which choice is made. Learning 2 implies a capacity to 'learn how to learn', in other words, a shift of frameworks from which choices are made.
Learning 3	Learning 3 is a shift in the underlying premises and belief systems that form frameworks. Level 3 learning involves a capacity to 'make a corrective change in the system of sets of alternatives from which choice is made'. In other words, the capacity to examine the paradigm or regime within which action is based.

Figure 2. Bateson's Levels of Learning

Mezirow (1990, 1991) can be credited with coining the term 'Transformative Learning'. In describing his theory, he acknowledges the influence of personal construct theory (Kelly, 1963) and how he (Mezirow, 1990:4)

'Attempts to redress an apparent oversight in adult learning theory that has resulted from a failure to recognise the central roles played by an individual's acquired frame of reference, through which meaning is construed and all learning takes place, and by the transformation of these habits of expectation during the learning process'.

The theory is essentially constructivist (as opposed to constructionist approaches

which are discussed later) based on the idea that meaning resides with the individual who construes him or herself in relation to others rather than with or through others:

‘Learning is a dialectical process of interpretation in which we interact with objects and events, guided by an old set of expectations. Normally, when we learn something, we attribute an old meaning to a new experience. In other words, we use our established expectations to explicate and construe what we perceive to be the nature of a facet of experience that hitherto has lacked clarity or has been misinterpreted. In transformational learning, however, we reinterpret an old experience (or a new one) from a new set of expectations, thus giving a new meaning and perspective to the old experience’. (1990:11)

So for Mezirow (1991), transformative or higher level learning is about re-framing perceptions. In this context, reflection becomes ‘critical’ and leads to transformative learning when it ‘involves a critique of the presuppositions on which our beliefs have been built’ (Mezirow, 1990:1).

‘Action Science’ and double loop learning

The publication of Argyris and Schön’s (1974, 1978) texts on individual and organisational learning marked the beginning of a new phase of conceptualising management learning. Although their ideas around single and double loop learning are more widely recognised in the context of explaining how organisations learn and grow, they credibly introduce the need for individuals and organisations to question underlying assumptions upon which practice is based. In their words (1978:3):

‘Double loop learning occurs when error is detected and corrected in ways that involve the modification of an organisation’s underlying norms, policies and objectives’.

They are disdainful of theory which does not offer solutions nor lead to action. Managers have ‘theories of action’ which provide guiding principles for what they do. These theories of action are, however, underpinned by theories-in-use and

espoused theories (Argyris, 2004). The latter represent ideas and ideals of how managers should act in given situations based on their beliefs, values and attitudes. Most managers seemed to stick to fairly similar patterns of behaviour regardless of cultural, national or language differences between them. The values underpinning this behaviour are:

1. Achieve your intended purpose
2. Maximise winning and minimise losing
3. Suppress negative feelings
4. Behave according to what you consider rational (Argyris, 1995: 21)

This work provides useful insights into the principles which managers believe guide their actions and those that actually do guide them.

'Model 1' theory-in-use behaviour leads managers and organisations to adopt 'defensive routines' which prevent them being embarrassed or threatened. Individuals are unlikely to admit mistakes or ignorance of facts, even to themselves. In fact, managers may act in ways which are viewed by others as uncaring and irresponsible whilst believing that they are behaving with integrity because this is their espoused theory. Double loop learning occurs in individuals when they begin to question their actions and values by comparing their Model 1 ('in use') behaviour and their Model 2 ('espoused') behaviour. The process is almost identical to the earlier and more often quoted, theory of double loop learning in organisations (Argyris and Schön, 1978).

Argyris and Schön's original work (1978) was based on 150 cases in which they asked participants to report difficult interventions they had undertaken in their organisation. Managers engaged in the research, were asked to remember the actual dialogue spoken and to record their thoughts and feelings during the discussion. Argyris (1995) advocates a 'left and right hand column case method' as one instrument of action science (that is, the process by which individuals begin to see their taken-for-granted theories). This involves a manager writing an imaginary conversation they might have with someone else engaged in the problem, anticipating the response of the other person involved and noting any

ideas and feelings that s/he (the manager writing the case) would not communicate. Managers are then encouraged to redesign their actions once they have uncovered the 'skilled incompetence' revealed by their writing.

The 150 cases initially researched provide the empirical basis of ongoing work in action science. The cases were all derived from US organisations (mainly 'business firms', 10 school principals and a 'small number' from government agencies) and Argyris and Schön's claim to have defined worldwide managerial behaviour seems rather exaggerated, particularly given the more recent work on the effects of national culture on management practice (Nonaka and Takeuchi, 1995, Trompenaars 1997).

The nature of management learning in business schools

Reed and Anthony (1992:596) posit that:

'The institutions of higher education see their primary 'mission' as providing a much larger pool of well-educated and qualified younger people from which British business can select their future generations of managers'.

Grey and Mitev (2004:159) argue that under such a system,

'Universities and university teachers become 'producers' of knowledge and students become 'consumers' or 'customers'. Such a conception, which is becoming widespread in the public sector and in private sector re-organizations (du Gay and Salaman, 1992) is as pernicious as it is absurd.'

The debate amongst UK academics about the nature of management education in business schools has emerged from the critical school and focuses on discussions about the content of the management curriculum. Critical management pedagogy represents an attempt to counter the growth of positivist, technicist approaches to teaching and learning about management in UK universities. Its proponents deplore the lack of an insightful and questioning

approach in the face of major change in the practice of management. Post-Fordist restructuring and the associated rise of new or repackaged management thinking (e.g. HRM, TQM, corporate culture) has brought about this need to change (Willmott, 1994:106) Willmott's 'Provocations to a Debate' paper advocates making management education more personally meaningful based on 'the cognitive insights generated by critical management academics and the experiential insights generated by action learning' (Willmott, 1994:106).

The debate created by Willmott and others (Reed and Anthony, 1992) about critical pedagogy focussed, for a number of years, on the content of the curriculum rather than the experience of the learner. Latterly, researchers have begun to focus more on the experience of the learner in the 'critical' classroom (Reynolds, 1999; Currie and Knights, 2003). For critical management academics (see, for example, French and Grey, 1996) the managerialist epistemology on which the majority of management education is based, is incomplete in that it only presents one face of the issues confronting managers in organisations. This approach to teaching management assumes that management education and management practice are functionally related. This leads to a 'black box' effect: an assumption that what is learned in the classroom is applied in the workplace, leading to superior performance. An uncomplicated curriculum adds to this phenomenon in giving managers a list of 'how to's' rather than asking them to question what they do and others think.

According to French and Grey (1996) this model is based on that of professional training where there is a body of knowledge which relates to effective practice. The arguments about the production of management knowledge and its relevance to practice have already been rehearsed earlier on in Chapter One. French and Grey (1996:3) call for management education which is not functionally related to management, but is a reflection of prevailing debates within management research. They seek to examine the assumption that management education stands in a more or less functional relationship to management practice. It seems axiomatic amongst politicians, civil servants and many academics that there is a clear set of skills and knowledge which managers must

acquire in order to be effective. French and Grey (1996) go on to criticise previous attempts to appraise management education (for example, Constable and McCormick, 1987 and Handy, 1987) as merely elaborating new pedagogic techniques.

This view collides with the prevailing lay approach, promoted by government, that management education is largely vocational. Few undergraduates or postgraduates study it for its intrinsic value, most do so with a fair degree of instrumentality usually linked with the capacity to command a higher salary in the marketplace.

So what does a critical management curriculum embrace? Critical management pedagogy is often described as anti-managerialist in nature, offering a critique of management practice and mainstream management research (French and Grey, 1996). Management tends to be taught rather than learned, students largely accepting the views of tutors and textbooks with little question. The danger of such an approach is that the education of managers within universities is in danger of preparing them to solve problems using a set of formulae as opposed to giving them an ability to 'read' a situation and to make their own judgements. Critical management theorists also appear to deplore the fact that management is de-politicized and that the inherent conflict between organization and employee, manager and managed has largely been ignored by mainstream management education theorists (Anderson and Thorpe, 2004). Critical management theory provides the basis of an alternative curriculum or at least one which is juxtaposed with the traditional functional approach. Grey and Mitev (2004:152) offer a useful analysis of the differences between managerialist and critical academics:

'Managerialist management academics replicate commonsensical views by treating management as a morally and politically neutral technical activity. Hence management education becomes primarily concerned with the acquisition of techniques, regardless of the context of their application. Critical management academics, on the other hand, are concerned to analyse management in terms of its social, moral and political significance and, in general terms, to challenge management practice rather than seek to sustain it'.

Engendering 'higher level' learning; Critical Management Studies

Critical management studies represent an attempt to radicalise and politicise the curriculum and to engender new ways of conceptualizing and problematizing managers' roles and work. Almost invariably, accounts of critical management pedagogy in action refer to the process of critical reflection as an inherent part of the process, often implying that it is this reflection which leads to higher-level learning (see, for example, Perriton, 2000; Currie and Knights, 2003; Samra-Fredericks, 2003; Perriton and Reynolds, 2004; Fenwick, 2005 Corley and Eades, 2006 and Anderson and Thorpe, 2007). Reynolds' (1997; 1998; 1999) work on critical reflection provides the touchstone for much of the work on critical pedagogy.

For Reynolds and many other critical academics (e.g. Alvesson and Willmott, 1999) critical reflection has its origins in critical social theory. Orthodox critical theory is normally associated with the work of the 'Frankfurt School', a diverse group of left-wing intellectuals who worked at the Frankfurt Institute for Social Research during the 1920s and early 1930s returning to Germany after basing themselves in the US for the duration of Nazi rule. Most texts give slightly different lists of scholars who might claim membership of this group, but most agree that of them, Horkheimer, Adorno, Marcuse and Habermas have had the most impact. The term 'Critical Theory' was created by Horkheimer in 1937 when he was distinguishing between traditional theory and the new perspective adopted by this group (Horkheimer, 1976). Their focus was to develop a critical perspective in the discussion of all social practices and as such their writing builds upon and challenges the thinking of prominent philosophers and social scientists particularly Kant, Hegel, Marx, Weber, Lukacs and Freud (Held, 1980). The two main strands of critical theory, namely ideology critique and communicative action (Alvesson and Deetz, 2000), form the overarching framework for the themes of dialectics, emancipation, hegemony, technocracy,

democratisation, mediation, anti-postivism, praxis and the focus on the centrality of language known as the 'linguistic turn'.

Carr (2000a) refers to critical theory as 'a process of critique ... it separates itself from both functionalist/objective and interpretive/practical science through a critical epistemology that rejects the self-evident nature of reality and acknowledges the various ways in which reality is distorted'

A critical approach to inquiry produces a form of knowledge that is multidimensional (Ogbor, 2001) and acknowledges the role of consciousness and ideology in knowledge creation. Critical theory, it is argued, brings about change in societies (and organizations) by standing back from the established order and questioning its practice; nothing is taken for granted, especially that which is presented as untouchable.

The creation of 'emancipatory interest' is key to critical theory: inquiry should not just create new truths but lead to changes which serve the interests of all groups, particularly those who hitherto have had little or no power. Issues of emancipation, hegemony, dialectics and praxis must be considered as a whole in order to understand critical theory. In organisational studies, the goal of critical theory has been to create societies and workplaces which are free from domination, where all members have an equal opportunity to contribute to the production of systems which meet human needs and lead to the progressive development of all. (Ogbor, 2001)

The rise of knowledge over practice

The foregoing discussion has illustrated the tensions existing in management education. The major underlying problem is the concern of government, academics and managers themselves to professionalise management. This has inevitably led to attempts to produce a codified 'set' of knowledge which can be

taught in business schools and which will certify managers as licensed practitioners. The MBA is seen as the pinnacle of achievement in this regard.

However, there is some doubt as to whether management should be regarded as a profession, a science or a practice. Management academics, particularly in the US and increasingly in the UK, are on a relentless mission to prove their scientific credentials both as a way of gaining credibility in the university at large and of retaining their roots in the tradition of economics and other 'hard' disciplines. The creation and promulgation of this scientific knowledge has the effect of enlarging the distance between management practice and research.

There have been calls for an alternative pedagogy many of which advocate using action learning (McLaughlin and Thorpe, 1993, Willmott, 1994) or promote double loop learning (for example, Eden, 1988 and Gold *et al.*, 2002) but these are all partial in that they advocate either a philosophy or a method of learning but do not fully explain and exemplify both the underpinning principles and the way in which this may be enacted by managers in the course of their learning.

The critical curriculum is offered as a way of engaging managers more closely in relevant research which provides them with an opportunity to critique current practice and received wisdom. However, this is often over-politicised and remote from managers' expectations of solution-driven, normative approaches of how-to-do management. Whilst there appears to be a need for managers to examine and critique the norms which drive the practice of the profession, CMS offers a discourse which can seem remote from a practitioner's experience. Practice-based approaches are few and far between; they are difficult to introduce and sustain in a university environment as only a small number of academics are interested in teaching in this way and it is also conspicuously resource-intensive. However, there is some consensus that critical or thoughtful reflection and the acknowledgement of the role of tacit knowledge are important factors in transformative management learning.

The next section in this literature review goes onto discuss the nature of critical thinking and reflection and the integration of the tacit with the explicit. It also examines a number of theories of management learning with particular emphasis on higher-level learning (Fiol and Lyles 1985).

What does critical reflection entail?

Reynolds (1997, 1998, 1999) proposes five principles upon which critical reflection is based:

1. 'Questioning assumptions and taken-for-granted. 'The fundamental task of critical reflection is to identify, question and if necessary, change those assumptions. It is a process of making evaluations, often moral ones, and not simply exercising judgements of a practical, technical nature'. (1998:189)
2. 'It has a collective focus; as an antidote to the 'overriding preoccupation with the individual and the personal in adult education'. (1998; 189)
3. 'Analysing power relations – 'Perhaps the most notable distinction between reflection and critical reflection'. (1998:190)
4. 'It is concerned with emancipation; 'The realization of a more just society based on fairness and democracy'. (1999:173)
5. 'Confronting spurious claims of rationality and objectivity and revealing the sectional interests which can be concealed by them'. (1999:173)

Critical management pedagogy ideally involves radical content (based on critical theory) and process. Radical process is not achieved by taking an experiential approach as in typically constructed management development programmes, as their individual focus means that they fail to meet the 'collective' ideal (Reynolds, 1999) and also because they are built on a 'humanist' perspective which does not take account of social, political and cultural forces which provide a context for learning (Reynolds, 1997).

Mingers (2000) questions the nature of criticality in the context of management education and addresses a key assumption – that management academics either take a utilitarian, managerialist approach in their teaching or that they are antagonistic to all management as an activity. He suggests:

‘Focusing attention away from *management* as a class-based hierarchy towards *managing* as an activity that we all do, in our personal and occupational lives, and that is done to us’. (Mingers, 2000:222)

‘Critical’ takes on three meanings in this context:

‘*Critical* as in the idea of crucial or vital, issues facing management and organization ... *critical thinking* as in the ability to evaluate the validity and strength of arguments and proposals...*and* the idea of adopting a critical stance towards the accepted, managerialist, assumptions underpinning most management education’. (p.224)

The solution which Mingers and his colleagues devised is based on Habermas’ (1979, 1984) theory of communicative action and (1992, 1993) discourse ethics and his theory of the validity claims of speech acts and covers four aspects of the critical approach:

1. Critical thinking – the critique of rhetoric ... being able to evaluate whether people’s arguments and propositions are sound in a logical sense.

2. Being sceptical of conventional wisdom – the critique of tradition ... questioning fundamental assumptions.

3. Being sceptical of one dominant view – the critique of authority

4. Being sceptical of information and knowledge – the critique of objectivity ... questioning the validity of the knowledge and information...available and recognizing that it is *never* value-free and objective’. (Mingers, 2000: 225-226)

There is a good amount of congruence between Reynolds’ (1997, 1998, 1999) definition of the criticality underpinning critical reflection and Mingers’ (2000) working definition of criticality. However, Mingers (2000) does not specifically use the term ‘critical reflection’. The participative approach described by Mingers (2000) in the exposition of the undergraduate course based on these principles

concur with Reynolds' suggested technique. Conspicuous by its absence in Mingers' work is a discussion of any emancipatory intent.

Interestingly, both Mingers (2000) and Reynolds (1997) refer to and seem to support Willmott's (1997) proposal that critical action learning presents a useful format for developing criticality and critical reflection.

Critical pedagogy in action

Giroux's (1981) distinction between 'content focused radicals' who advocate a more politicized curriculum and 'strategy based radicals' who adopt a humanistic approach to teaching and learning, (Reynolds, 1998), illustrates the division between those who promote a critical curriculum and those who seek to develop a critical pedagogy. Critical pedagogical approaches are more concerned with the thought processes experienced by the learner and the techniques adopted by the teacher to engender these. It is possible to be both content focused and strategy-based at the same time. The major flaw in the critical camp's argument is that there are very few examples of critical pedagogy in action. Willmott (1994, 1997) argues strongly for action learning as a way of promoting critical thinking. His ideas are based on the work of McLaughlin and Thorpe (1993) who suggest that action learning is a new paradigm. However, there is little empirical evidence to support these claims.

Reynolds' (1999) paper on the pitfalls and possibilities of a critical management pedagogy identifies two main problems with critical reflection in management education; resistance and disruption. Resistance stems from the reluctance of many management students to engage in overt criticism of 'managerialist' or performative approaches to management. This is especially the case for many undergraduate students who are introduced to critical approaches (both in terms of content and delivery) in their final year, having been conditioned, in many cases, to sit, listen and absorb information. Currie and Knights (2003:38) observe that this also extends to many international students, particularly those from

South-East Asia, for whom a participative approach is alien. Currie and Knights' (2003) study, which discusses the impact of the use of critical pedagogy on an MBA programme, found that these students chose a UK MBA to become 'socialised into western thinking' and were 'dismayed that this western management thinking was being disparaged by management teachers'.

In a similar vein, Reynolds (1999) invokes Brookfield's (1994) 'dark side' of critical reflection; the way in which it may be emotionally unsettling for students, thus causing 'disruption'. Brookfield's (1994) work with adult education teachers reports a feeling of 'impostorship' amongst those who are encouraged to critique the work of established management theorists.

Whilst encouraging students to think in a critical and emancipatory way, the critical management educator's power often goes unheeded. Currie and Knights (2003:40) write of critical management teachers taking the 'moral high ground' and 'assuming a position of enlightened superiority'. Perriton and Reynolds (2004) acknowledge the fact that teachers in Higher Education are in a position of 'intellectual authority' which is reinforced through assessment procedures. It could be argued that students participate in 'critical' discussions and write assignments in a certain way (to fit with the teacher's views) merely to gain the best possible marks in their chosen module, thus emphasising and prolonging the power imbalance.

Reynolds (1999) also points out that a critical perspective is based on the assumption that managers are unaware of their responsibilities to various stakeholders (including employees) and of the ethical burdens which this may place upon them. Reynolds (1999) cites Watson's (1994) ethnographic study of managers at ZTC Ryland in which he portrays managers as all too aware of their moral and social responsibilities. This is in sharp contrast to a critical social theory perspective which assumes an imbalance of power in favour of managers who, it is assumed, automatically abuse it. Burgoyne (1995:95) suggests that 'critical' management academics take on the title in order to assume academic

legitimacy and that they emphasise the gulf between practising managers and management academics,

‘As a result of some kind of disdain for managing or lack of confidence in their ability to engage with it without becoming absorbed into the managerialist values from which they wish to keep a critical distance’.

This intellectual snobbery also manifests itself in the texts which critical academics engage with and create. Cavanaugh and Prasad (1996) suggest making critical theory more accessible to students and acknowledging the heavyweight prose which prevents many students (and academics) understanding and embracing critical perspectives. This sits uneasily with the critical approach of management teachers supposedly foregoing their position as ‘expert’ in the classroom (Currie and Knights, 2003).

Whilst critical approaches are intellectually weighty enough to be considered suitable for use in the university classroom, there is some doubt as to how useful they are for practising managers. Brookfield (1994) reports that some of the adult education teachers featured in his study felt marginalised on their return to work; most organisations do not accommodate subversive attitudes and discourses for prolonged periods. It is also difficult to work in an organisation if you are perceived as, or perceive yourself as, a member of a minority. Of course, as Reynolds (1999) observes, participants who do not take a critical approach in the course itself can be marginalised there too. It is unsurprising that there are few accounts of critical management pedagogy being extended beyond the university environment. One exception is Perriton’s (2000) work with ‘heretical’ organisational educators, although the approach of these management development practitioners is based on ‘critical’ and questioning approaches to teaching and learning rather than a critical content.

Cope (2003) discusses critical reflection in the context of entrepreneurial learning in his examination of discontinuous events as triggers for ‘higher-level’ learning. He differentiates between transformative learning (Mezirow, 1991) which the

individual experiences and double loop learning (Argyris and Schön, 1978) which the organisation undergoes as a result of critical incidents (although he sees the two as often contemporaneous in small firms). Cope's (2003) work deals with naturally-occurring critical reflection rather than that which might be instigated by a teacher or trainer. He does, however, refer to the research interviews as a 'sensemaking process' (p.436) so the research process could be seen as the intervention which engenders critical reflection and raises the learner's consciousness of it.

Thorpe *et al.* (2005), provide a systematic review of knowledge use within SME's covering the 'knowledgeable SME manager or entrepreneur, knowledge systems and routines embedded in the context of the firm...*and*...the institutional and policy framework that is intended to support knowledge production within SME's' (p.274). Their findings include:

'That it is the use of flexible, unstructured and socially embedded experiences and relations that exemplify the knowledgeable and knowledge-creating entrepreneur'. (p.274)

And that:

'Understanding the aims, objectives and motivations of entrepreneurs and managers is important since they have a significant influence on the firm's activities'. (p.276)

They recommend that in terms of policy to encourage the development of SME's, attention should be paid to how firms (and their owner-managers) build *absorptive capacity* 'by which a firm internally accumulates and distributes the knowledge available in its network' (Cohen and Levinthal, 1990). They observe that knowledge (or in the context of this study, learning) is social and contextual, relying heavily on the development of social capital.

Pragmatist conceptions of critical management education

So far, we have considered a version of critical reflection which generally assumes an emancipatory intent and is based on critical theory and/or epistemology. Watson (2001:386) presents his 'pragmatist' approach to critical management education and learning as an alternative. In doing so he makes a helpful distinction between the education and training of managers:

'Education ... is *about* the occupational activity whilst the latter is *for* it – in the sense that it serves or 'services' members of the occupational group'

Many management academics would not view their role as one of training managers ('servicing' them, as Watson puts it) but this certainly does not correspond with the view of many students and of the UK government who have commissioned numerous reports into the state of management education, linking it directly to managerial performance. Watson (2001:387-8) claims that this role is not necessarily inimical to being critical and his pragmatist approach to criticality is constructed thus:

- 'An acceptance of some degree of functionality whilst still rejecting technicist thinking – that view of management as morally and politically neutral'.
- 'Applying traditional scholarly criteria of rigour, challenge to taken-for-granted assumptions and political or ideological biases, debate, logical consistency'.
- 'The product ... will not be guides to action ... but knowledge and insights which can be used by managers and non-managers'.
- 'It works towards an ideal of producing a *negotiated narrative* between learners and management academics'.

Watson (2001) goes on to describe an approach to teaching and learning which uses narratives or stories as the basis for questioning assumptions and of connecting knowledge to practice without using an overtly 'critical' content. He describes an approach to MBA which focuses on 'management speak',

encouraging students to explore the range of meanings and the language games inherent in management practice.

In a similar vein, Anderson and Thorpe (2007) give an account of an MSc programme in which students are encouraged to use and work with the language of three critical epistemologies as a device to connect knowledge and practice. Learners are encouraged to develop 'mastery' of the language of research as a way of questioning and reconfiguring their own and others' management practice. In this scenario, critical approaches are as much up for debate as so-called managerialist thinking and practice.

Dehler *et al.*, (2001) offer an extensive literature review of critical pedagogy and reflection. They adopt the notion of 'complicated understanding' to support their view that paradox may be used as a tool for thinking. 'Complicated understanding' involves '*increasing the variety of ways (events) can be understood*' (Bartunek *et al.*, 1983:282). Encouraging complicated understanding in the management classroom acknowledges the over-simplification of much management theory and the over-use of normative models, offering a universal panacea. Musson and Cohen (1999) describe their experiences of running workshops with postgraduates asking the overt question, '*What role does language play in (e.g.) organizational change?*' Learners are encouraged to examine dominant discourses, stories and metaphors in their organizations and are given analytical tools to examine and interpret discourse.

Wherefore Criticality or even criticality?

'There is a risk that Critical Theorists "know best" and establish themselves as "Authorities", thereby silencing a dialogue that they profess to promote ... Even something that begins by opening up understanding or facilitating reflection can end by locking people into fixed, unreflective thinking'. (Alvesson and Willmott, 1996:175)

Critical theory (with a capital 'C') seems to be the dominion of a coterie of self-referential academics engaging in 'superior moralizing' (Samra-Fredericks, 2003). There is certainly a debate surrounding the usefulness (in whatever context) of Critical approaches to learning about management. Pragmatist approaches, such as the one described by Watson (2001) deal much more in managers' everyday dilemmas and issues whilst attempting to stretch them intellectually. This could be described as critical with a small 'c'. Cope (2003) suggests that the use of the word 'critical' is problematic because of the associations with Critical Social Theory. He suggests using the terms 'deep reflection' or 'intense reflection' to represent the kind of reflection which challenges personal norms and assumptions as opposed to that which has an emancipatory intent.

So, is there room for Critical reflection and critical reflection in management learning? Reynolds (1999:182) proposes that methods and curriculum are unimportant and that the important choice is 'between engaging with critical reflection or avoiding it'. He once again suggests 'participative methodologies' such as the 'learning community' (Reynolds, 1997) and its cousins, learning 'sets' and action learning, as devices for providing 'critical reflection based on a supportive community of peers'. These methodologies could also be termed social constructionist approaches in which the emphasis is on the creation of meaning with and through others.

Entrepreneurial learning

There is rich literature around entrepreneurial learning in which, strictly speaking, entrepreneurs are those who start up and grow businesses. In fact, many businesses now exhort their employees to be more entrepreneurial, encompassing the idea of someone who is innovative, willing to take risks, creative and have a vision of the future. So whilst many owner-managers may not, in the strictest sense, be entrepreneurs, many of them feel the need to develop these skills (or qualities) in order to be successful (in whatever context this is understood).

Rae's (2004) framework for entrepreneurial learning consists of a model with three major themes; personal and social emergence, contextual learning and negotiated enterprise. Rae's (2004:494) first theme of entrepreneurial identity includes:

- 'narrative construction of identity
- identity as practice;
- their role in relation to their family; and
- tension between current and future identity'

Contextual learning is the second theme and allows entrepreneurs to recognise and act on emergent opportunities and includes:

- 'learning through immersion within the industry or community;
- opportunity recognition through cultural participation; and
- practical theories of entrepreneurial action'.

The third theme of the negotiated enterprise includes:

- 'participation and joint enterprise
- negotiated meaning, structures and practices;
- engagement in networks of external relationships; and
- changing roles over time'.

Rae's (2004) framework provides us with a model of how the emergent entrepreneur learns from experience and from reflecting on that experience. He provides a set of reflective questions which acts as an 'educational aid' – the sensemaking process which may lead to 'transformative' learning (Mezirow 1991).

Action learning

The notion that action learning provides the solution to making management education more critical is put forward in the literature but never taken much further. This may be because the action orientation and practical bias of action learning means that it could be seen to downplay the academic content of the curriculum.

Action learning as a term is used to define a wide variety of management development practice. For some, its use is synonymous with approaches that might be appropriately used to describe 'active learning'; for others, when it is the method that is emphasised, the focus moves to stress self-managed learning yet for others, action learning cannot be action learning unless a *Revansesque* or 'Scientific' (Marsick and O'Neil, 1999) approach is followed (Anderson and Thorpe, 2007).

Pedler (1991) offers the following definition:

'Action Learning is an approach to the development of people in organizations which takes the task as the vehicle for learning. It is based on the premise that there is no learning without action and no sober and deliberate action without learning ... The method ... has three main components – people, who accept responsibility for taking action on a particular issue; problems, or the tasks that people set themselves; and a set of six or so colleagues who support and challenge each other to make progress on problems'.

Participants in action learning meet in 'sets', and work on 'real-world' problems. These problems do not have clear solutions and are not puzzles, which are susceptible to expert advice. Through social interaction, team members take advantage of alternative views on their problem; therefore, learning occurs as a function of the experience within the group and not from an external source (Marsick and O'Neil, 1999).

Revans (1980:256-7) the so-called 'Father' of action learning is particularly scathing of management academics and business schools and particularly the MBA which he describes as 'Moral Bankruptcy Assured', recommending that:

'Instead of paralysing the natural curiosity of our participants in some high-flown syllabus, action learning obliges each to look critically at his own experience, dragging it out for the inspection of his colleagues...his next moves should be ... debated with his fellows so that his first perceptions of his own past are constantly and inexorably under review ... he will constantly be called upon to explain why he is following the course of action he has chosen ... and *will* ... see that the only other persons who can help him are his colleagues, those comrades in adversity who also look to him for help'.

Pedler (1996) describes Revans' basic premise: for organisations and individuals to flourish then the rate of learning has to be equal to or greater than the rate of change (expressed as $L \geq C$). Learning has two elements, traditional instruction or *Programmed knowledge* (P) and critical reflection or *Questioning Insight* (Q), giving the learning equation, $L=P+Q$. Programmed knowledge, however, should only be sought after careful reflection on what knowledge is needed and why. So action learning sets bring people together to:

- 'Work on and through *hitherto intractable problems* of managing and organising ...
- Work on problems which personally engage the set members – situations in which 'I am part of the problem and the problem is part of me'
- Check individual perceptions of the problem, to clarify and to render it more manageable, and to create and explore alternatives for action
- Take action in the light of new insight ... the effects of the action is brought back to the set for further shared reflection and understanding
- Provide the balance of support and challenge ... which will enable each member to act and learn effectively
- Be aware of group processes and develop effective teamwork. Usually sets will have an adviser or facilitator whose role is to help members identify and acquire skills of action and learning

- Focus on learning at three levels:
 - About the problem which is being tackled
 - About what is being learned about oneself; and
 - About the processes of learning itself, i.e. 'learning to learn'

(Pedler, 1997)

Revans (1979:4) places great emphasis on the idea that action learning obliges subjects to become more aware of their own value systems. He makes a distinction between self-development as Do-It-Yourself (Teach Yourself Russian or Teach Yourself Mathematics) and the development *of* self, not merely development *by* the self of what is known of the external world (p.8). Further, Revans (1971, 1979) developed 'System Beta' which, in essence is his theory of learning. It is presented as a five stage model:

- a) 'Becoming aware...fact-finding, investigation...such awareness may come spontaneously...or with slow and cautious circumspection
- b) Speculation...theorising
- c) Test...experiment...hypothesis
- d) Audit...verification' (1979:13-14)
- e) Control, assessment, review, conclusion'.

Revans (1979) goes onto describe how subjects (learners) in action learning sets engage in each of these stages with each other. In both pieces of work in which System Beta is described (Revans, 1971, 1979), there is an odd mix of the positivistic language of traditional psychology and a softer, person-centred language which has less of a grounding in 'science'. System Beta, therefore, could be viewed as an attempt to position action learning as a legitimate model of learning, in the academy. In doing so, Revans' work encompasses a broad spectrum of ideas about the nature of reflection from the 'simple' yet social reflection described by Kolb (1984) through to the notion of dialogical and radical reflexivity put forward by social constructionists such as Shotter and Cunliffe (2003) twenty years later.

McLaughlin and Thorpe (1993:20) suggest that action learning can be viewed from three perspectives:

‘Action Learning as a Toolbox of Techniques’ In this approach, it is assumed that a group of managers comes together in an action learning set, each with a problem to solve and in doing so develop management competencies, for example in interpersonal skills, chairing meetings and communications.

‘Action learning as Therapy’- ‘Searching for answers to difficult work-related questions in conditions of risk and confusion helps managers to know themselves ... The process of addressing a work problem with the critical support of ‘comrades in adversity’ will engender a social, emotional and intellectual transformation’.

‘Action Learning as Philosophy’ ‘Action learning can also be viewed as a set of beliefs, which provide those who subscribe to them with a distinct world view. This world view acts in much the same way as a faith or religion in that it provides a specific interpretation of the world and prescriptive principles as to how each individual should address the world’.

McLaughlin and Thorpe (1993:23) propose that action learning offers a new paradigm for management development, one that embraces the individual and their development within the context of organisational development, this approach challenges established approaches to management education and development in a number of ways, including:

- The curriculum is defined by the manager or organization rather than through a notion of management practice established through research.
- Self-development is important.
- Experts are viewed with caution.
- Models, concepts and ideas are developed in response to problems rather than offered as tools for thinking and action.
- Learning is social rather than individualist.

The usefulness of learning is tested through practice and application and re-framed as a consequence of action and reflection. In some ways the

process is akin to action research and the method, which incorporates knowledge being tested through practice, has a strong mode 2 component (Anderson and Thorpe, 2007).

Examples of action learning in practice

Action learning takes many guises. Marsick and O'Neil (1999) offer three different 'schools' of practice: Scientific - the Revans (1982) approach based on the $L=P+Q$ equation referred to earlier; Experiential – based on Kolb's experiential learning cycle and Critical Reflection – based on the idea that Kolbian simple reflection is insufficient and relying on Mezirow's (1991) conception of critical reflection which enables participants to question their own assumptions and the underlying norms of the organisation.

Pedler *et al.* (2005), researching the extent to which action learning is practised in the UK, found that it was employed by 24 universities, 14 of which used it in their business school. Other sites for use included the NHS, the small business sector, local government and voluntary organisations. There was a 'notable silence' from large businesses and consultancies although this is ascribed to a lack of response to the call for information rather than a lack of action learning activity in these sectors. A key purpose of Pedler *et al.*'s (2005) research was to assess how action learning approaches may contribute more to business and management teaching; they suggest that some business school staff are aware of approaches based on activity theory or situated learning but are not necessarily using them in practice. They, it is claimed, hold an 'espoused theory' of action learning without the ability to translate it into practice. However, Pedler *et al.* (2005:66) do consider action learning could be used more widely in CPD activity and in the form of self-managed action learning. Their survey also identified a number of radical alternative approaches to Revans 'classical' view of action learning which are discussed in the next section.

Alternatives to 'traditional' action learning

The practices described here are seen by Pedler *et al.* (2005) as 'dilutions or evolutions' of Revans classical principles of action learning:

Critical action learning

Willmott (1997:124) proposes that a Freireian view of education (Freire, 1972) with educators situating themselves as co-learners, based on a critical view of management is consistent with an action learning approach which could usefully be applied in higher education:

'A key feature of the Action Learning process is a growing appreciation of, and sensitivity towards, 'darker' aspects of organisational life that are routinely marginalized or coded within everyday practice'.

Willmott (1997:125) envisages three possible responses from learners who may gain new insights from an education based on a critical management curriculum coupled with the experiential approach of action learning:

1. New 'nuggets of knowledge' are 'banked'.
2. They are 'integrated into the individual's repertoire of knowing and acting'. In other words, there is a recognition of the tensions inherent in organisational life which influences the actions an individual might take but there is little critical reflection on why these tensions exist.
3. The individual re-assesses (perhaps only fleetingly) their notions of power and politics within the organisation and questions basic assumptions.

For Willmott, (1997:125) 'The philosophy ... of Action Learning is implicitly critical of the status quo'. He argues that its practice should be tied to critical management theory.

There would seem to be two main problems with Critical action learning. The first is that, despite its promise, there are very few examples of it in practice (Pedler *et al.*, 2005) and secondly, that it serves to emphasise the management academy's

narrow view of Critical Management Studies rather than the broader view of critical management.

Auto action Learning

This approach to action learning dispenses with the need for a 'set' or group of individuals to work with 'in favour of a repeated discipline of holding oneself to account for action against a set of questions' (Pedler *et al.*, 2005:60/61)

Action mentoring or coaching

This describes a dyadic approach to action learning which could be set up as a mentoring relationship or could involve the 'last' two members of a set; the latter is most likely to occur when action learning forms the basis of a qualification programme. (Pedler *et al.*, 2005:60/61)

Online and remote action learning

'Action learning using real time via telephone conference or CCTV' (Pedler *et al.*, 2005:61) or more prosaic forms of co-learner communication such as email.

Self-Managed action learning (SMAL)

This approach follows Revans' Classical Principles in that it dispenses with the need for the strong presence of a facilitator within the set.

Business-driven action learning

Boshyk's (1999,2002) model of action learning has a strong focus on the needs of the organisation as opposed to the personal development needs of the individual.

Criticisms of action learning

Pedler (1997:250-1) presents four criticisms of action learning:

1. 'Despite its basis in questioning, action learning has become increasingly incorporated into unquestioned management agendas'

The 'Q' aspect is crucial in action learning – especially naïve or insightful questions. Action learning can become simply 'active learning' thus eroding its transformative possibilities.

2. 'Action learning is atheoretical or 'anti-theory'.

Despite Revans' (1980) distaste for business school education, the idea of using action learning, combined with a critical curriculum is gaining currency. McLaughlin and Thorpe (1993); Willmott (1994), Reynolds (1997) and Mingers, (2000) are amongst those writing about its possibilities, although accounts in practice report marginal, specialised activity (Rigg and Trehan, 2004; Anderson and Thorpe, 2007).

3. 'Action learning is too centred on the individual as agent; as actor and learner'.

A naïve picture of the reality of working in organisations where managers would find great difficulty in solving problems single-handedly.

4. 'Action learning sets can degenerate into support groups for individuals'

This could promote an 'inner focus' which does not help to solve organisational problems.

Pedler (1997:258) suggests that engaging in action learning 'as social construction' may go some way to answering these criticisms. This would acknowledge the existence of different voices and characterise action learning 'where everyone contributes their problems and insights to achieve a shared

understanding'. This perspective moves the focus from the individual as learner - Pavlica *et al.*'s (1997) 'Intellectual Robinson Crusoe', referred to earlier - to the group and the organisation as the sites and sources of learning, with language and dialogue the mediators of that learning. Revans (1979) also refers to Robinson Crusoe in the context of learning and reflection. However, Revans emphasises the role of Man Friday, 'a companion from a totally different culture' (p.9) in prompting Crusoe to question his assumptions and examine his conscience.

So how *should* managers learn?

Many of the models of management development emphasize that it is a deliberate and planned activity and something which is done **to** managers (Cullen and Turnbull, 2005). Models of management education similarly cast the manager as the receiver of knowledge rather than an active participant in its formation and use. This dominant image of the manager as passive in the learning process serves to emphasise the perceived need for a fresh approach to management education. The critical action learning approach, that is, critical in the Critical Management Education (CMS/CME) sense, seems to offer an ideal way forward as it connects the curriculum with a pedagogical device, both designed to unsettle learners' preconceptions.

For the first half of my PhD studies, I used CMS and Critical Pedagogy as the touchstone for my work. It offered an approach which had both critical reflection and a robust literature at its heart. I initially set out on the data collection phase with the intention of learning from action learning practice in the SME field and then marrying this with a critical curriculum in order to offer a way of successfully integrating the two. However, I began to realise that there was a rich vein of literature that I had disregarded and that my politicized view of CMS provided far too narrow a focus. This literature dealing with language as ontology, under the headings of practical authorship (Shotter and Cunliffe, 2003) and social poetics

(Cunliffe, 2002a and 2002b), is dealt with in Chapter Six, reflecting the more grounded approach which became a feature of my work as it progressed.

Chapter Three

Research methodology

Introduction

The literature review presented in Chapters One and Two has explored the nature of management learning and illustrated why the phenomenon of critical reflection needs to be explored further. This chapter aims to set out the philosophical and practical stance taken in relation to the research: this entails more than simply selecting appropriate methodologies and methods although these are also dealt with here. Crotty (2003) describes four elements of the research process: epistemology, theoretical perspective, methodology and method. This chapter uses these headings to explain the choices made in designing this piece of research and the rationale behind those choices, particularly the adoption of a social constructionist philosophy and the focus on the creation of social reality in management learning. It also sets out an ontological perspective, which Crotty (2003) subsumes into his four elements; here it is made explicit (see figure 3 on page 65). The reason for emphasising the role of ontology in this study is that the nature of language use in social learning is under scrutiny.

The research design is explained and justified; issues of access and sampling are also covered. In terms of the analysis of data, I originally set out with the intention of using discourse analysis but ultimately found this too far removed from the original text; it became clear during the interview phase that to distance myself from the text in this way would not be helpful. Here, I explain how a more grounded approach was adopted together with the reflexivity which emerged as the research progressed.

Situating myself in the research

The first person ('I', 'me') is used in this chapter rather than the traditional form of referring to 'the researcher' in the third person. The reason for this will hopefully become clearer as you read this chapter; suffice to say at this point that the research is reflexive and as such, my involvement as the researcher is under scrutiny. Using the first person hopefully makes the thesis easier to read and understand.

The research framework

Crotty (2003) offers a 'scaffold' upon which researchers may devise and make sense of their research strategy. It provides a relatively simple and clear-cut device for thinking about philosophical and methodological choices and how these impinge upon each other. His framework is reproduced overleaf.

Crotty (2003) advises that the research proposal is described using these terms. However, he suggests that this should be done by starting with research methods and then working our way back through research methodology and theoretical perspectives to epistemology. Whilst Crotty's 'scaffold' is used here, the research process is described and justified in the opposite order to that which he suggests, commencing with a discussion of epistemology and then showing how this links with the ontological perspective, the overall approach taken and the particular methods used to collect and analyse data. The philosophical and the practical aspects of the research design must be congruent and it seems reasonable that philosophical choices precede and influence the gathering and interpretation of evidence. Here, I have chosen to commence with a discussion of ontology.

Epistemology	Theoretical perspective	Methodology	Methods
Objectivism Constructionism Subjectivism (and their variants)	Positivism (and post-positivism) Interpretivism <ul style="list-style-type: none"> • Symbolic interactionism • Phenomenology • Hermeneutics Critical Inquiry Feminism Postmodernism etc	Experimental research Survey research Ethnography Phenomenological research Grounded theory Heuristic inquiry Action research Discourse analysis Feminist standpoint research etc	Sampling Measurement and scaling Questionnaire Observation: <ul style="list-style-type: none"> • Participant • Non-participant Interview Focus group Case study Life history Narrative Visual ethnographic methods Statistical analysis Data reduction Theme identification Comparative analysis Cognitive mapping Interpretative methods Document analysis Content analysis Conversation analysis

Figure 3: Crotty's 'Research Scaffold' Crotty (2003:5)

What is ontology?

Whilst the recent literature on social research is very clear about the need to understand and clarify epistemological positions, there is much less consensus about the need to declare one's ontological perspective. This may be the case because of the difficulty involved in explaining the differences between epistemology and ontology; 'how we know what we know' and 'the nature of the

world to be known about' seems to reduce it to a misleading level of simplicity. Crotty (2003) prefers the term 'theoretical perspective' to ontology whilst May (2001) discusses what others may term epistemological and ontological approaches under the heading of '*Perspectives on Social Science Research*'. The most thorough discussions of ontology are in the literature devoted to discussing the critical realist approach (see, for example, Sayer, 2000) which relies heavily on the notion of a 'stratified ontology' to differentiate it from traditional realist perspectives.

If we take ontology to signify the 'study of being ... a certain way of understanding *what is*' (Crotty, 2003:10) then objectivism and realism have, until recently, constituted the predominant ontological perspectives. An objectivist ontology would appear to go hand-in hand with a positivist epistemology in that it assumes a:

'Permanent ahistorical matrix or framework to which we can ultimately appeal in determining the rationality, knowledge, truth, reality, goodness or rightness' (Bernstein, 1983).

A realist ontological perspective acknowledges and emphasises the role that people play in determining their social world; in order to explain phenomena, we must theorise why people act in certain ways rather than detachedly observing these actions.

A third approach to explaining the nature of the world to be learned about is subjectivist and its proponents would argue that there is no such thing as 'truth' and that:

'Experience of the world is structured through the ways discourses lead one to attend to the world ... as discourses structure the world, they at the same time structure the person's subjectivity, providing him or her with ... a way of being in the world'. (Alvesson and Deetz, 2000:97)

Morgan and Smircich (1980) provide a continuum encompassing a range of core ontological assumptions, linking each with an epistemology and methodologies.

They explain that the ontological stance assumed dictates the nature of what constitutes adequate knowledge. These decisions about ontology and the associated assumptions about human nature should perhaps therefore be decided first. In practice and in this research, ontological and epistemological approaches are so closely intertwined that they are decided upon contemporaneously. It is useful, however to think about the two both separately and together, rather than subsuming ontology within epistemology. The abbreviated version of Morgan and Smircich's (1980) framework is reproduced here:

	<i>Subjectivist Approaches to Social Science</i>					<i>Objectivist Approaches to Social Science</i>
Core ontological assumptions	Reality as a projection of human imagination	Reality as social construction	Reality as a realm of symbolic discourse	Reality as a contextual field of information	Reality as a concrete process	Reality as concrete structure
Assumptions about human nature	Man as pure spirit, consciousness, being	Man as social constructor; the symbol creator	Man as an actor; the symbol user	Man as information processor	Man as an adaptor	Man as a responder
Basic epistemological stance	To obtain phenomenological insight, revelation	To understand how social reality is created	To understand patterns of symbolic discourse	To map contexts	To study systems, process, change	To construct a positivist science
Some favored metaphors	Transcendental	Language game, accomplishment, text	Theatre, culture	Cybernetic	Organism	Machine
Research methods	Exploration of pure subjectivity	Hermeneutics	Symbolic analysis	Contextual analysis of Gestalten	Historical analysis	Lab experiments, surveys

Figure 4: Network of Basic Assumptions Characterizing the Subjective-Objective Debate within Social Science. Morgan and Smircich (1980:492)

What is epistemology?

Epistemology; the study of the criteria by which we can know what does and does not constitute warranted, or scientific, knowledge ... Epistemology determines the criteria by which justified knowledge is possible'. Johnson and Duberley (2000:3)

'Epistemological circularity; any theory of knowledge presupposes knowledge of the conditions in which knowledge takes place. In effect, this prevents any grounding of epistemology in what purports to be scientific knowledge ... because one cannot use science in order to ground the legitimacy of science'. Johnson and Duberley (2000:4)

The conundrum of epistemological circularity means that we cannot hope to find the 'best' way of carrying out research in order to produce new knowledge; we can only produce this knowledge from a stated perspective. However, we, and our readers must be clear about what this perspective is. It is only in being clear about what our epistemological convictions are (or, if 'conviction' is too strong, at least the standpoint adopted for a particular piece of work) that we can produce good 'science'. On this basis, it may not be going too far to suppose that we should judge research firstly by the clarity and consistency of its epistemological foundations and how these are reflected in the methodology employed, before we draw conclusions about the usefulness of the findings.

Positivism

'We contend that, as the field has grown and as it has sought scientific legitimacy through adoption of many of the trappings of scientific enterprise, it has simultaneously become more rigid, more homogeneous, more self-referential, less able to embrace novelty, and hence less able to co-evolve with the world to which it is connected. At a moment in history when management itself is undergoing dramatic change, management research, imprisoned as it is by its institutional structure, finds itself needing to adapt but effectively unable to do so'. (Bouchiki and Kimberly, 2001; 78-79)

In order to justify an epistemological position and a theoretical perspective, it seems reasonable to start with a discussion of positivism: in this case, to illustrate why a positivist approach has not been taken. In Crotty's (2003) terms, objectivism is the epistemology and positivism the theoretical perspective – the

two are largely inextricable from each other. The positivist tradition emanates from the assumption that all knowledge is derived from observed facts. Positivists assert that there is an external world waiting to be discovered by researchers as independent observers using objective methods. Positivist approaches to social science ape natural science and use a deductive approach, creating new knowledge by analysing causal relationships and the laws covering them (Gill and Johnson, 1997). The rejection of the metaphysical and the quest for scientific objectivity create an extreme epistemology to which few writers currently align themselves. The term 'positivist' has become somewhat pejorative and is often used to discredit the work of others rather than to describe one's own frame of reference. However, positivist or nomothetic (Burrell and Morgan, 1979) methods still feature strongly in the 'heavyweight', usually US, management literature. As Bouchiki and Kimberly (2001) point out in their work quoted above, positivism does not adequately reflect the reality of management in modern organisations. However, the nature of the management academy and the reliance on publication in peer reviewed journals to generate funding means that positivism (or post-positivism or neo-positivism) prevails. In this type of research, methodologies are highly structured and have a formulaic approach. Quantitative data from large samples are used to test hypotheses; procedures are rigorous and guided by a thorough knowledge of pre-existing theory. The researcher is independent and distant.

This predominance of positivism should come as no surprise. The linear nature of education in the UK and the US, with set curricula and the pre-eminence of the 'right' answer, teaches us to think in straight lines and to seek explanation rather than understanding. Most academics are likely to be the 'successful' products of such a system and are therefore unlikely to change the behaviour and way of thinking that has served them so well in the past. The starting point for anyone's philosophical position seems to be positivism; social constructionist and subjectivist positions purport to be its antithesis. Hence, positivist approaches are crucial to a deeper understanding of the world, even if we have no faith in their epistemological foundations.

Labelling the philosophical approach of this study

I am faced with a range of choices about how to name and describe my philosophical choices and their implications for subsequent methodological decisions. Certain words and terms are used interchangeably or differently which can be confusing for the novice researcher. Social constructionism has become something of a 'catch all' for qualitative research in general; Crotty (2003) warns against this practice. There is also a debate about the tendency to make a distinction between qualitative and quantitative approaches to research. Morgan and Smircich (1980) assert that the dichotomy between the two methods is 'rough and oversimplified'. However, other respected writers in the field of management research use the term 'Qualitative' with authority and ease (for example, Denzin and Lincoln, 2003; Symon and Cassell, 1998). In a similar vein, Easterby-Smith *et al.* (2002) propose that positivism and phenomenology are antithetical paradigms, whereas Crotty (2003) presents phenomenology as a subset of interpretivism. Not surprisingly, there is a general agreement about the definition of positivism but as we move into more subjective territory, definitions become blurred and debatable.

Not wishing to enter into a debate in which there are probably no 'right' or 'wrong' answers anyway, I will attempt to define and explain the epistemological and ontological choices that I have made using the terms which seem to describe it most usefully. The ontological premise of this research, using Morgan and Smircich's (1980:494) heuristic, is one that views reality as a social construction:

'The social world is a continuous process, created afresh in each encounter of everyday life as individuals impose themselves on their world to establish a realm of meaningful definition. They do so through the medium of language, labels, actions and routines ... Symbolic modes of being in the world, such as through the use of language, may result in the development of shared, but multiple realities'.

The epistemology is also social constructionist and the focus of the study is on how social reality is created. I am particularly interested in how language is used

as a mediating influence in learning with a particular emphasis on how managers experience and enact the learning process. It is tempting to adopt an extreme subjectivist or postmodernist approach. Postmodernism's allure is in its subjective ontology and epistemology with a strong emphasis on language and discourse. In particular, Boje's (2001) idea of being able to somehow 'capture' the antenarrative seems an ideal approach to conceptualising the 'layers' of language which managers use. However, this wholly subjectivist ontology does not lend itself to helping to explain how language and learning might be connected in this context. For managers engaged in learning, and action learning in particular, there have to be outcomes; very often, these are tangible measures of success. As a researcher, seeking to explore the nature of action learning, I feel I have to be honest about the empathy I have for the pragmatism which is embodied in its practice. To research the phenomenon from a wholly subjectivist stance seems antipathetic to the values of those involved in it. As an approach to management learning, action learning creates a process that emphasizes questions and reflection (Marquardt and Waddill, 2004) and ultimately leads to action. My intention is for the study to mirror this process and this implies at least a small dose of realist ontology within a social constructionist epistemology.

Social constructionism

'I was not searching for some fundamental 'truth' about the world, or about managerial activity in that world. It was more a search for a way of giving an account of, or 'putting across' what management is, in a way which might be closer to the 'realities' of the managerial experience than much of what is on offer in management textbooks and courses'. (Watson, 1994)

The premise that reality is socially constructed was most notably put forward by Berger and Luckmann (1971). Human beings engage with the world around them; other people, inanimate objects and nature, and in so doing 'make sense'. Gergen (1999) proposes four working assumptions underlying social constructionism:

1. 'The terms by which we understand our world and our self are neither required nor demanded by 'what is there' ... we are not locked within any convention of understanding'.
2. 'Our modes of description, explanation and/or representation are derived from relationship ... language and all other forms of representation gain their meaning from the ways in which they are used within relationships'.
3. As we describe, explain or otherwise represent, so do we fashion our future. Language not only generates meaning but shapes present and future reality. We must develop generative discourses that challenge the status quo and help us understand and shape the future'.
4. 'Reflection on our forms of understanding is vital to our future well-being...we must learn to be reflexive, question the taken-for-granted, be critical of traditions'.

Research undertaken with a social constructionist epistemology is likely to focus heavily on language as the mediating influence in the co-creation of meaning. There is a focus on 'dialogue', 'conversation' and 'talk'. It will have a critical, reflexive focus in that it questions taken-for-granted assumptions. It will question the privileging of a 'scientific' language over others in academic circles. The collection of qualitative data normally forms part of an iterative process as opposed to a positivist linear approach in which deduction and discovery rather than induction are the guiding principles. In adopting a social constructionist stance, researchers should be aware of the effects of their presence and influence on the subjects and the data.

Shotter and Cunliffe (2003) adopt what they term a 'relationally-responsive' version of social constructionism. Their concept of managers co-creating meaning through social poetics leads them to conclude that managers should examine their dialogues (both with themselves and others) in order to discover new possibilities and examine what was previously taken for granted. The idea that knowledge and knowing are embedded in specific social contexts reflects a highly subjective ontology yet Shotter and Cunliffe (2003) align this ontology with principles of social constructionism to explain their epistemological stance. Their belief is that managers who understand the social constructionist nature of their *meaning-making* actions are likely to become more critical of normative

prescriptions and more aware of ethical and moral considerations. So a heightened awareness of the role of language in shaping reality may improve managerial practice.

Constructionism/constructivism?

Two types of meaning-making are possible; that of the individual mind generally termed *constructivism* and the collective generation and transmission of meaning described as *constructionism* (Crotty, 2003). There is a tendency for these terms to be used to mean the same thing. However, Gergen (1999:60) offers a useful explanation of the deliberations on reality construction and the writers associated with them:

Radical constructivism: a perspective with deep roots in rationalist philosophy, that emphasizes the way in which the individual mind constructs what it takes to be reality ... Claude Levi Strauss and Ernst von Glazersfield.

Constructivism: a more moderate view in which the mind constructs reality but within a systematic relationship to the external world ... George Kelly and Jean Piaget.

Social constructivism: here it is argued that while the mind constructs reality in its relationship to the world, this mental process is significantly informed by influences from social relationships ... Lev Vygotsky and Jerome Bruner.

Social constructionism: here the primary emphasis is on discourse as the vehicle through which self and world are articulated, and the way in which such discourse functions within social relationships.

Sociological constructionism: here the emphasis is on the way understandings of self and world are influenced by the power that social structures (such as schools, science and government) exert over people. Henri Giroux and Nikolas Rose'.

Ethical considerations

I am and was particularly conscious of the ethics of my involvement. This was not a project in which I could move in, collect data, retreat and pontificate from a distance. I was dealing with people's lived experience, thoughts and feelings; encouraging them to be open and honest and to reveal themselves emotionally. A discussion of ethics must include some idea of what it is to be a human being and in this case, how social science researchers affect the lives of others both in the way that they conduct their research and in the impact of its outcomes on the lives of others. It is about rights and responsibilities of researchers and subjects, defining the limits of behaviour and, either explicitly or implicitly, the moral principles underpinning it. We must also think more widely than the researcher and the individual subjects:

'Ethical issues spring from conflicts between the four parties involved in research involving human subjects: individual participants..., the researcher, the larger society and the researcher's profession'. (Warwick, 1982)

The Statement of Ethical Practice produced by the British Sociological Association is the closest thing that the management research community has to a set of professional guidelines for carrying out research. Rather than suggesting rules for practice, as suggested by an ethics committee, the BSA (2002) proposes a set of guiding principles. A consciousness of the effects of our research on colleagues encompasses two main areas: the reputation of the profession as a whole and the impact that 'unethical' practice may have on access to certain groups in the future, particularly if deception has been used to gain data. The BSA encourages its members to be thoughtful about ethical issues and that 'departures from principles should be the result of deliberation and not ignorance'.

The BSA's (2002) principles are:

Professional integrity: This covers areas such as safeguarding the interests of

those involved in research, the need to report findings accurately and truthfully. Researchers should not undertake work which they are not qualified to carry out, that is, claim expertise in an area which they have none. They should also avoid actions which may have deleterious consequences for sociologists who come after them.

Relations with and Responsibilities towards Research Participants: respecting the rights of others, taking responsibility for the use to which their research may be put.

Relationships with Research Participants: safeguarding the physical, social and psychological well-being of research participants. Gaining informed consent, offering realistic guarantees of anonymity and confidentiality where applicable.

Covert Research: only to be used where it is impossible to use other methods to obtain essential data.

Relationships with Funders: Clarifying obligations, roles and rights of funders and researchers.

The BSA clearly states that sociological research must negotiate 'competing obligations and conflicts of interest'. However, it does not purport to police research but places ethical responsibility on the shoulders of individual researchers. There is a recognition here that to offer absolutes in terms of ethical policy could stifle creativity in addition to disempowering and alienating individual researchers. The essence of the document is to encourage a mindfulness of the likely consequences of our actions as researchers. Ultimately, however, the decisions rest with us.

The ontological and epistemological approach of a study will influence the ethical stance taken:

'Every epistemology tends to become an ethic, and ... every way of knowing tends to become a way of living ... Every mode of knowing contains its own moral trajectory, its own ethical direction and outcomes'. (Palmer, 1987)

For example, a positivist, empiricist approach assumes a value-neutral position whereas a feminist epistemology has an inherent emancipatory bias.

Action Research studies and their 'cousins', Appreciative Inquiry (Cooperrider and Srivastva, 1987), Co-operative Inquiry (Heron, 1996), Action Science (Argyris, Putnam and Smith, 1985) represent an emerging research tradition in which ethical issues play a dominant role. Many researchers in this tradition acknowledge feminist theories and epistemologies as inspiring their approach (Maguire, 2001). Much Action Research has an overtly spiritual flavour. Reason and Bradbury (2001) use the term 'human flourishing' to describe the inherent purpose of increasing the well-being of human beings through the research process. Research is participatory and leads to practical outcomes for the individuals and communities who are cast as both subjects and co-researchers. Theoretical and empirical knowledge created through this process can be applied in action; it serves to 'liberate the human body, mind and spirit in the search for a better, freer world' (Reason and Bradbury, 2001).

There must also be occasions when subjects' individual and collective morals and ethics have an impact on researchers. These situational ethics may come into play in ethnographic studies in which the researcher works alongside others in an organisation and adapts his or her behaviour to fit with co-workers and is, in turn, influenced by their moral and ethical principles. Watson's (2001) study of the fictional ZTC Ryland is a case in point. Watson describes the 'intuitively developed mundane rhetorical skills of managers' as a way of shaping meaning. In ethnographic studies such as this, researchers adopt behaviour which maintains credibility with subjects therefore we cannot ignore our subjects' impact on us. Gaining access and 'good' data means adapting to new environments and at least respecting other ethical frameworks. It is in this situation that the qualitative researcher stands to benefit from significant personal development:

our privileged position as investigators of social life gives us an opportunity to question our own values and assumptions or at least to explore other ethical frameworks. In this study, it has to be said that ethical considerations were under review, not just throughout the period of data collection and analysis, but in the writing up and presentation of that data.

Reflexivity

Reflexivity entails the researcher being aware of his/her effect on the process and outcomes of research based on the premise that 'knowledge cannot be separated from the knower' (Steedman, 1991) and that, 'in the social sciences, there is only interpretation. Nothing speaks for itself' (Denzin, 1994). In carrying out qualitative research, it is impossible to remain 'outside' of our subject matter; our presence, in whatever form, will have some kind of effect. Reflexive research takes account of this researcher involvement.

The concept and practice of reflexivity has been defined in many ways. Alvesson and Sköldbberg (2000) describe it as the 'interpretation of interpretation' – another layer of analysis after data has been interpreted. For Woolgar (1988), reflexivity is 'the ethnographer of the text'. Here I distinguish between 'introspective' reflexivity (Finlay, 2002) 'methodological' reflexivity and epistemological reflexivity (Johnson and Duberley, 2003).

Introspective reflexivity

This approach to reflexivity involves a high degree of self consciousness on the part of the researcher especially in terms of how his or her identity affects the design and process of their work. Introspective reflexivity has been likened to reflection whereby we simply 'think about what we are doing' (Woolgar, 1988). For some, this is more likely to be reflection-in-action as per Schön's (1983) model of the skilled practitioner who incorporates reflection into their everyday

activities, rather than deliberately and consciously reflecting as part of post hoc rationalisation of events.

Steier (1995:75-76) characterises the personal engagement of the researcher in three ways:

- **Research as both invention and intervention:** As researchers we can view ourselves in two ways: either as inventors of order in our interpretation of the social processes we are observing or as co-constructors of that situation by virtue of our presence.
- **Emotioning in research:** Our own engagement with what happens in the group is not entirely rational and our translation of it will be affected by our own emotions.
- **Research as mutual mirroring:** Rather than reflecting real images, the researcher may help to frame the behaviour of the group or vice-versa.

This approach can be criticised for giving too much focus to the researcher rather than the subjects, in that it can be highly self-referential with an emphasis on self-disclosure rather than on presenting 'meaningful' research.

Methodological reflexivity

A focus on the methods deployed in research as well as an acknowledgment of the role of the researcher results in a more technically oriented reflexivity. The design of the research is of paramount importance; so whilst the researcher may have been actively involved in co-constructing meaning and does not deny this intersubjectivity, there is a clearly articulated methodology which emphasises the researcher's closeness to the subject matter, yet a conscious professional distance is maintained.

It could be argued that both of these approaches to reflexivity work on a relatively superficial level: the first at the level of the individual, in the form of the researcher and the second at a theoretical level, setting out to prove that acceptable standards have been adhered to in the conduct of the research. Neither

approach questions the epistemological or metatheoretical assumptions underpinning the research.

Epistemological reflexivity

Our readers must be clear about what our metatheoretical perspective is. It is only in being clear about what our epistemological and ontological convictions are that we can produce truly reflexive research. It is not enough to merely state our epistemological stance but to question it and perhaps reframe it as we proceed. Consciousness here is not so much of self *per se* but of 'becoming more consciously reflexive by thinking about our own thinking' (Johnson and Cassell, 2001).

Reflexive research should be *language sensitive* (Alvesson & Deetz, 2000) and the linguistic turn in management studies has emphasised the need for reflexivity. For example, research undertaken with a social constructionist epistemology is likely to focus on language as the mediating influence in the co-creation of meaning. There is a heavy focus on 'dialogue', 'conversation' and 'talk'. It will have a critical, reflexive focus in that it questions taken-for-granted assumptions. The collection of qualitative data normally forms part of an iterative process as opposed to a positivist linear approach. Deduction and discovery rather than induction are the guiding principles that go hand-in-hand with researchers being aware of the effects of their presence and influence on the subjects and the data.

Reflexivity, from a postmodern perspective, questions assumptions and does not treat knowledge as the domain of a chosen few in an intellectual elite. Lyotard (1979) proposes that scientific knowledge does not represent the totality of knowledge; narrative knowledge is significant because in this case, knowledge is not separated from the knower. Thus, as researchers we must examine the effects of our own lives and thoughts on the knowledge that we seek to capture and use.

The researcher's role in developing theory

Schein (2001:228) discusses the role of the researcher, the nature of research and the psychological contract formed using three dimensions:

1. Whether the initiative for the inquiry is launched by the participant or the researcher.
2. The degree to which the researcher/inquirer becomes personally involved in the inquiry process; and
3. The degree to which the participant in the research becomes personally involved in the process

This results in a matrix showing eight different kinds of inquiry model (see Figure 5 on page 82).

As this study was initially carried out as part of an evaluation activity for a regional development agency funded project, certain parts of it can be classified as client-initiated. This falls into the area of contract research (5 in Schein's matrix) – high researcher involvement and low subject/client involvement. However, as the project progressed and the aims of the research became more focussed on gathering useful data for this thesis, it moved into category 3 research (participant observation and ethnography) – again, high researcher involvement and low subject/client involvement. As I moved to the interview stage of the data collection process, some interviews moved into the 'Action research' area (4) as they became exercises in joint inquiry and sensemaking. Some interviews, however, could be classified in quadrant 2 'Experiments and surveys' as subjects were very much in control of the data they provided and the extent to which they were prepared to become engaged in discussion with me and how far they were prepared to reveal themselves emotionally. So whilst we can talk about designing a research strategy, the quality of the data collected is reliant on subjects being willing to provide them. This, of course, can be influenced by the researcher making subjects feel comfortable and assuring them of confidentiality and anonymity but if someone does not want to discuss their feelings in any

depth, then there is only so far we can go in pressing them to do so.

I felt a certain 'duty of care' with my subjects and was conscious that I am not a trained therapist when they were revealing their feelings to me. My experience as an action learning set adviser helped here in that I tried not to be judgemental, to be empathetic, to listen and to be self-conscious. There were occasions when I felt privileged to be involved in creating subjects' accounts of their learning and others when I felt as if the discussion was benefiting neither me nor them. As the interviews progressed, it became apparent that, for some subjects, it became another layer of the sensemaking process which action learning had been for them, yet for others was merely a matter of perfunctorily answering questions.

<i>Researcher/consultant initiates the project</i>		
Subject/client involvement		
	Low	High
Low	1. Demography	2. Experiments and surveys
High	3. Participant observation and ethnography	4. Action research
<i>Subject/client initiates the project</i>		
Subject/client involvement		
	Low	High
Low	6. Internship	7. Educational interventions and facilitation
High	5. Contract research and expert consulting	8. Process consulting and clinical inquiry

Figure 5: The Role of the Researcher. Schein (2001:228)

Research design

Gaining access

As 1.75 million of the estimated 4 million managers in the UK are managing small and medium sized enterprises (Perren *et al.*, 2001) this sector was chosen as the site for study. Specifically, the research was carried out with subjects involved in the Networking Northwest project, funded by the North West Development Agency. The project sought to involve 100 SME owner-managers in 20 action learning sets. As I was a member of the evaluation team for the project, access was not particularly problematic. I had no need to approach a 'gatekeeper' or find a 'sponsor' (Easterby-Smith *et al.*, 2002) as I was legitimately collecting evaluation data. My involvement in the project and in particular in accessing action learning sets was unquestioned by most (but not all) set advisers. Having said this, I still needed to find subjects who would be willing to talk to me and set advisers who would be willing to admit me. Getting access to sets was my first task as I knew that once I had attended a meeting and developed a relationship with the groups then it would be easier to ask individuals to take part in a subsequent interview.

Sample selection

I requested access as a participant-observer in six action learning set meetings. Sets were chosen in various locations in order to ensure a good geographical spread in the North West of England. I attended set meetings in rural Cumbria and Cheshire, in Salford, Crewe, Blackburn and Bolton. I explained to set advisers that I would prefer to work as a participant-observer; all of them were happy for me to do this once I had explained that I had experience of working both as a set member and adviser and was sympathetic to the action learning philosophy. My intention was to experience that set's meeting rather than to judge it. One set adviser did not allow me access, claiming that there were too many sensitive issues in her set (this was an all-male, all-Asian group; I was not told what the sensitivities were).

I also gained information from a network of 'recorders' or learning historians (Kleiner and Roth, 1996). These were individuals who were not members of the learning set (although some became *de facto* members as sets formed and worked together) but were embedded researchers, collecting data on behalf of the evaluation team. They provided the evaluation team with information which allowed us to form ideas and impressions of the make-up and work of learning sets across the project.

Methods of data collection

Crotty (2003) suggests a number of approaches to data collection and analysis; using his framework, the methodology employed here is ethnography and the methods are participant observation, interviews and participant learning journals. Although the distinction is made here between ethnography and participant observation, to a large extent, the terms are synonymous. Indeed, there is some confusion as to what ethnography actually covers. According to Gans (1999:541) 'empirical ethnography is now a synonym for virtually all qualitative research except surveys and polls'.

I do not intend to get involved in the debate about what is or is not ethnography. However, the reason that this research is labelled 'ethnographic' is to reflect the significant period of time I spent trying to understand how action learning sets work by being a part of them and by interviewing set members. Van Maanen (1988:1) suggests that the method of ethnography is fieldwork (or, what others may term participant observation) and its subject is culture or selected aspects of a culture. This represents how and what I am trying to achieve here.

Learning journal

The purpose of the learning journal was to generate interest in and awareness of the study. Participants in the programme were asked by recorders in the set to

complete a journal and send it back to me. Some recorders were better at remembering to do this than others. I received a total of 19 learning journals from a potential of around 100. Some journals were received from participants I had met in set meetings where I had been present, others were not. The learning journals were useful in identifying participants who were willing to take part in the study and as a starting point for the interview. Accounts of participants' learning as recorded in their learning journal are analysed here although these formed only a minor part of the data collection.

Participant observation

The term 'participant observation' is quite misleading; it is a general heading for four types of researcher engagement (Burgess, 1984):

- The *complete participant*, who operates covertly, concealing any intention to observe the setting.
- The *participant-as-observer*, who forms relationships and participates in activities but makes no secret of an intention to observe events.
- The *observer-as-participant*, who maintains only superficial contacts with the people being studied (for example, by asking them occasional questions).
- The *complete observer*, who merely stands back and 'eavesdrops' on the proceedings.

The participant-as-observer is the most common model of fieldwork in management studies. Here, the researcher openly declares him or herself as such and seeks to embed him or herself in the organisation, learning about the particular aspect of work in which s/he is interested and developing relationships with informants. Some accounts of participant observation carried out in this way report that the researcher is often forgotten about by informants who are generally more concerned about getting on with their job rather than being observed.

Watson's (2001) study of ZTC Ryland provides an example of in-depth participant observation of and with managers in a telecommunications company. Watson's account is interspersed with dialogue, designed to illustrate how managers make sense of their roles in their struggle to achieve objectives in a difficult business environment. The verbatim reporting of 'real' conversations as opposed to research conversations is typical of participant observation studies and allows Watson to describe managers' roles in a way which takes us beyond the normative models of management traditionally offered to students of management, portraying it instead as 'human social craft' (Watson, 2001; 223). In this study, I acted as a participant-as-observer; my presence in action learning sets was legitimised by my membership of the evaluation team. I was clearly there to collect information but the nature of action learning means that it is very difficult to have someone merely 'sit in' on a set meeting without that person being included in the discussion. This meant that I could take an active role in the discussions (and pose questions quite openly) rather than passively observing and taking notes.

The initial reason for participating in action learning set meetings was to get a feel of how the sets worked in this programme so that I could ask relevant questions during the interviews. However, they served much more of a purpose in that I gained an insight into how learning was occurring during the set meetings by observing and interacting with participants. So whilst the initial research strategy did not include reporting and analysing data from the six set meetings I attended, it became clear that here was a rich source of data. The set meetings were not tape recorded so accounts of them are taken from notes I made during the meetings and recollections of my own feelings and thoughts whilst I was part of them.

Interviews

The interview is the favourite methodological tool of the qualitative researcher

(Denzin and Lincoln, 1994:353) 'Qualitative' interviews are conducted in a range of ways based on;

- 'The degree of structuring (structured, semi-structured, unstructured)
- The number of people involved (individual or group)
- Media of communication (face-to-face conversation, telephone, e-mail)' (Alvesson and Svensson; 2008)

Easterby-Smith *et al.* (2002) suggest that interviews are appropriate when:

1. 'It is necessary to understand the constructs that the interviewee uses as a basis for her opinions and beliefs about a particular matter or situation; and
2. One aim of the interview is to develop an understanding of the respondent's 'world' so that the researcher might influence it, either independently, or collaboratively as is the case with action research'

These ideas resonate with the real world focus of action learning and the relational ontology which underpins the social constructionist epistemology of this study. 18 unstructured, one-to-one, face-to-face interviews were carried out. All interviews were recorded and subsequently transcribed.

Collecting qualitative data

Patton (2002:4) suggests that qualitative findings grow out of three kinds of data collection:

1. in-depth, open-ended interviews
2. direct observation
3. written documents

All three approaches are used here. Set meetings are described first in order to explore the process of action learning and what seems to be happening and how participants are learning. Next, interview data are reported to show how participants talk about their experience of action learning. 'Purposeful sampling'

(Patton, 2002) is used here, in that a relatively small sample of information-rich cases are presented. The sample chosen here probably does not reflect a broad cross section of the 100 SME managers who took part in the programme nor does it seek to provide evidence from all types and make-up of the range of learning sets which were created. Instead, I have chosen events and stories that best illustrate how learning occurs in the action learning situation and how participants experience action learning.

Methods of data analysis

Easterby-Smith *et al.* (2002) draw a distinction between two approaches to the analysis of qualitative data: content analysis and grounded analysis. Content analysis, as prescribed by Miles and Huberman (1984), involves developing a matrix with the constructs along one axis and respondents or occurrences along the other. Although this approach could be useful in synthesizing the work of a group of researchers, it is too clinical for the type of data generated here. However, another approach to content analysis, in the form of discourse analysis, was considered.

Discourse analysis.

From a management research perspective, the analysis of texts may entail a process of coding and quantifying the number of times a word or phrase has been used by respondents in, for example, interviews (see Easterby-Smith *et al.*, 1997:107). However, a grounded approach in which themes and patterns emerge from the data is more common. Once transcripts of the texts have been undertaken, an analysis can be made of relatively short passages of speech, examining syntax and semantics in close detail or the analysis may entail the examination of large amounts of material, using a system of coding and classification (again, see Easterby-Smith *et al.*, 1997:110-112, for an example).

However, the quantitative, content analysis approach does not lend itself particularly well to taking account of the social context in which these words are spoken.

A wider view of text encompasses cultural artefacts such as a picture, a building or a piece of music (Fairclough, 1995). Austin's (1962) work on 'speech acts' or 'performatives' is underpinned by an assumption that by making an 'utterance', language users perform a social act. One of Austin's examples is that in speaking an utterance, you may perform the social act of making a promise and, as a result, convince your audience of your commitment (Slembrouk, 2003). As management researchers, we are often much more interested in the social functions of language.

Fairclough and Hardy (1997) criticise mainstream linguistics for failing to 'develop an adequately social view of language' and propose a method for analysing discourse which encompasses an examination of 'text', 'discourse practice' and 'sociocultural practice'. Discourse analysis for Fairclough and Hardy is 'the process of identifying all the genres and discourses that are drawn upon in producing or consuming a text and the particular way they are combined together'. They focus on 'ideational, interpersonal and textual functions of language' by an examination of nominalization, pronouns, vocabularies, metaphors, mood (declarative, interrogative or imperative) and modality features. Although critical discourse analysis offers more scope for examining the social context and function of language, its emphasis on *post-hoc* analysis does not capture the 'words in their speaking' (Shotter 1993) approach that I wished to take.

Whilst my wish to produce a robust, credible and defensible thesis might lead me down the route of discourse analysis or critical discourse analysis, I tend to agree with Alvesson and Sköldbäck, (2000) that 'it's rather naïve to think that social realities can be expressed in unequivocal terms'. And that:

‘Utterances are explained in DA by their effects, what arises from them, and not by the intentions or cognitive processes lying behind what is said or written’.

Another issue is the fleeting, ‘once only’ element of speaking as opposed to written text or images. In the latter cases, the researcher has the opportunity to re-visit the image or the text. Even if the spoken words are transcribed, the researcher is distanced from them by time and consequent fading or distortion of memory. Spoken words lose their flavour not only when they are written down but also when they are analysed retrospectively. They are utterly transient; any attempt to re-capture them is flawed.

‘Research is done through listening, reading, speaking and writing as well as observing. And it is through language, formal and informal, official and unofficial, that the bulk of the business of management is conducted. It is through speaking to each other that all of us make sense of the worlds we move in, whether we are trying to make sense of things as managers, as researchers or as part of our ordinary lives’. (Watson, 2001:8)

For these reasons, formal discourse analysis and its derivatives such as narrative analysis, textual analysis and conversation analysis are not considered a suitable method of analysis here. Instead, I chose to collect narrative accounts of action learning experiences.

Analysing narrative accounts

Some of the analysis of my subjects’ accounts of their experience happened during the interview itself; certain things that were said or implied affected the direction of the interview. However, once I had collected data from set meetings and interviews, I was left with a huge amount of paper and I had to make some decisions about how I was to analyse it in a way which would be rigorous and robust and which would also provide a piece of research which could have an impact on practice. I am particularly taken with Turner’s (1983:348) idea of producing grounded theoretical accounts ‘which are understandable to those in the area studied and which are useful in giving them a superior understanding of

the nature of their own situation'

Following Glaser and Strauss (1967), I have used a grounded approach; themes have emerged from the data. I collected an 'adequate stock of accurate descriptions' (Martin and Turner, 1986:143) of the phenomenon in question (in this case, experiences of action learning among owner-managers) and have analysed them in a way which seeks to make sense of them.

The approach I chose to follow is that of 'Grounded Analysis' suggested by Easterby-Smith *et al.* (2008) as a way of 'sifting through volumes of non-standard data':

Familiarization: this step involves re-reading transcripts, field notes and drawing on unrecorded information. In my case, this meant listening to the tape recordings of the interviews, reading the transcripts and incorporating the notes that I had made after the interviews. I also had field notes from the action learning sets, including sketches of how the group was seated in relation to one another.

Reflection: Easterby-Smith *et al.* (2008) suggest asking the following questions:

- Does it support existing knowledge?
- Does it challenge it?
- Does it answer previously unanswered questions?
- What is different?
- Is it different?

I had an enforced lengthy period of reflection due to the fact that I had started a new job; this stage of the analysis was crucial for me as it prompted me to go back to the literature to re-define what I was looking for. I became much more concerned with my subjects' articulation of their experience of critical reflection as meaning making 'in the moment' (Cunliffe and Easterby-Smith, 2004) and the importance of 'words in their speaking' (Shotter 1993) rather than a 'colder' analysis of the actual words. This helped to refine my research questions and to identify how I might add something to the literature by using comparatively

lengthy verbatim narrative accounts to give both the flavour and content of the nature of critical reflection.

Conceptualization: This stage involves identifying the concepts which are important to understand what is going on. In this study, these emerged as:

- Non-learning
- Identity and self-efficacy
- Questioning basic assumptions
- Focus on business/self
- Community building
- Soul searching and mould-breaking

Cataloguing concepts: Easterby-Smith *et al.* (2008) suggest using focused codes (conceptual) and axial codes (categories or sub-categories). The six concepts listed above became focused codes and I read through interview transcripts and notes from action learning set meetings to find examples and linkages. Axial codes developed under each heading; for example, the way in which subjects discussed their experience of 'non-learning' or the various articulations of the development of a new identity.

Linking: This stage involves the development of theoretical codes and it was here that I looked at the data and started to hypothesise how the experiences described might relate to the level or extent of critical reflection experienced by subjects. These emerged as:

- Little or no reflection
- Simple reflection
- 'c'ritical reflection
- Radical reflexivity

Data grouped under the 'concept' headings and further analysed in sub-categories were then linked to these four modes of reflection which subsequently developed into a framework of modes of learning.

Re-evaluation: Easterby-Smith *et al.* (2008) suggest this as the final stage. In this research, evaluation was ongoing as concepts and theories changed and emerged as the analysis went on, the numerous iterations of the Discussion and Conclusions chapters formed part of the ongoing evaluation of the concepts; sensemaking came in the writing.

In the next chapter, I have identified the concepts and theoretical codes, but instead of reporting data using them as headings, I have written up the account of one individual whose story, in each case, best exemplified the themes that ran through them. The reason behind this I believe is that reporting one person's experience is 'truer' to the data, than creating a 'patchwork' of various people's accounts.

Chapter Four

Action learning in practice: data reporting and analysis

Introduction

The chapter begins with a description of two learning set meetings. The intention is to provide the reader with a picture or a sense of what happened in the action learning set meetings; the type of issues that are discussed, the ways members talk to each other and the role of the set adviser or facilitator. This is followed by five individual narrative accounts of learning.

The final section of the chapter uses Burgoyne and Hodgson's (1983) model for analysing learning experience which is based on Bateson's (1972) framework previously presented in Chapter One as a useful way of conceptualising the differences between distinct levels of learning.

Learning sets

I attended six learning set meetings; following Patton's (2002) suggestion of 'purposive' sampling, I will report on two here which provided particularly rich data and seemed to exemplify the group interaction and language which appeared to either promote or impede learning.

Learning set 1: Leafy Cheshire

This was an all female set, deliberately set up as such. The examination of the impact of gender mix in a set is beyond the scope of this research. However, there was a high level of self-disclosure from certain members of the group which may have been due to this factor.

The meeting took place in a semi-rural village church hall in Cheshire. There were seven members of this set; four of them attended this meeting (Karen, Louise, Susan and Annette) plus the facilitator, Paulette and the recorder, Zoe, who did not become involved in any of the discussions. One of the set members, Karen, was not an owner-manager but worked as personal assistant to the managing director of a business employing 25 people. I did not tape record the meeting but took extensive notes of verbatim comments and also made notes of what I felt was happening in the group. I used my drive home from the meeting to reflect upon what had happened and then wrote some further notes of my general impressions. I asked permission from the set to take notes and nobody objected; no-one ever made reference to the fact that I was writing or appeared to be conscious of it. The usual 'Chatham House' rules of an action learning set have been broken here – with permission from the set members, whose names have been changed.

Before the meeting started, there was some general chit chat and making of tea and coffee. However, this did not last long; the approach was very much about getting down to business. The group had met several times and had developed a protocol for running the set, which they did not need to be reminded about. This protocol was very much along standard action learning lines. Each individual presents their own particular issue which is then followed by questions from the rest of the group; responses from other set members should not be about offering solutions but allowing that person to resolve issues for themselves.

Karen was the first to present her issue. She was by some way the youngest member of the group. (At a guess, in her late twenties whereas the others were in their forties). Karen said she had problems with her boss; she wanted to go to college to pursue a CIPD qualification but her boss refused to fund it. Karen said that she intended to pursue the qualification as it was important to her. Paulette spent some time trying to clarify what Karen wanted to work on in the meeting: Karen said that she wanted help finding a new job and this was decided upon as the issue to be worked on. However, as soon as this had been decided, Karen

started telling the group how she wanted advice on convincing her boss to train and develop her and other people in the company:

'Can anyone help me please? ... He's not listening'.

Karen used emotive language and gestures throughout her airtime:

I love people...I enjoy seeing their development ... I need to restore faith'.

Paulette persisted in asking Karen what she wanted to work on but this was difficult to pin down. The conversation turned into a discussion of Karen's relationship with her boss. Karen's tone continued to be highly charged:

'I want to do more HR and help people have a better life at work ... I'm going to sign up for college ... he'll say he doesn't want me to do it, I'll tell him I'll find a company that will ... I'm not being valued ... I'm not being challenged..

Throughout the discussion, Karen talked about her feelings whilst others, notably Paulette and Susan, encouraged her to come up with a plan of action. Karen portrayed herself as unselfish and caring:

'I don't think about myself a lot ... I'm happy if they're happy'.

This certainly was not the impression Karen was giving in the meeting; she used the words 'I', 'me' and 'myself' constantly. When she was challenged to come up with actions that might help her to resolve her problems, she answered in a vague manner and persisted in talking about how she felt. Her airtime ended rather scrappily with no action being decided upon.

Louise runs a marketing consultancy business as a sole trader. She reported that she did not have any particular issues to discuss as she felt she had learned from presenting problems at earlier meetings.

Susan's airtime slot took up most of the rest of the meeting. Susan reported that she was in the process of setting up a business offering seminars, lectures and one-to-one coaching for women wanting to improve their communication skills; specifically, *'dealing with men in business'*. The other half of Susan's business was public relations. Her airtime question was about how to promote her new

business, offering the same kinds of service, in partnership with a former television presenter. The conversation started quite seriously with a discussion of the pro's and con's of partnerships and then moved onto an interchange about what each partner could bring to the business in terms of personal strengths. Susan said that she didn't like talking about her personal strengths; Annette, who had arrived late at the meeting, interjected with:

'You've got great tits!'

No-one responded to any great degree (although Annette herself continued to laugh under her breath). Annette appeared to be something of an interloper in the set; she was physically removed from the rest of the group, sitting between me and Zoe, and somewhat away from the table which everyone else was leaning on and talking across. Annette also had very little airtime and the rest of the group complained about her after she left.

Susan continued by talking about how she intended to market the business and other set members began listing ideas of whom she might contact. Paulette interjected at this stage and encouraged them to ask questions. Very little emerged from this exchange and it soon became clear that Susan preferred to use the opportunity to talk about the balance of activities in her life. It seemed her real issues were about not being able to sell her house and not earning enough money. Major life changes (divorce and resigning from a well paid job) seemed to be taking their toll:

'I used to have a secretary now I have to pick up the kids from school'.

When Susan talked about the things that were worrying her, she sometimes used gestures rather than words to express herself, almost as if the strain of finishing the sentence was too much for her:

'I'm downsizing big time: it will be a massive weight off ... places hands on shoulders'.

'I'm in the hands of him ... points skywards'.

Susan often ran her fingers through her hair seemingly as an expression of her frustration or the burdensomeness of her situation. These gestures seemed to resonate with the rest of the group and their non-verbal signals were conveying sympathy. The questions turned to how Susan could find more time to relax and she resisted these; when asked what she did in her spare time, she replied:

'The ironing. There's so much happening at the moment'.

When she was asked what she enjoyed doing, she said

'Not being busy enough'.

Few actions were decided upon as a result of Susan's airtime.

Annette was given a short amount of airtime at the end, but chose to talk about her experience of working with the group rather than dealing with a particular issue. (This may have been as a result of my presence). Annette was a director of a small engineering company and had just set up an interior design business. There were few questions (none were invited) and Annette's airtime was something of a tale of her self-discovery:

'Being honest with people and not feeling bad about it ... not beating myself up ... it's ok to get things wrong'.

The rest of the group looked bored and Paulette abruptly put an end to Annette's monologue.

The meeting formally closed; Louise and Susan carried on discussing Susan's situation, Annette left and Karen chatted with Paulette. On the way out, all of them discussed how they felt that Annette was not really entering into the true spirit of action learning and did not contribute that much to the group. Susan's personal account of her learning is detailed later on in this chapter.

Learning set 2: Not so leafy East Lancashire

I attended the seventh of twelve planned meetings. The brief for this set was much more defined than in the other groups I met with. The following excerpt from a progress report prepared by the set adviser details the way the set worked:

'Participants receive a set of business slides on a particular topic or topics 3 weeks before the action learning set is due to meet. They are then expected to work on the slides and apply. Participants are asked to come up with an issue related to the topic or topics that they can bring to the action learning set for discussion. If participants have no issues relating to these particular topics they are encouraged to bring any issue of relevance to them at the time. Participants email their issue to the programme leader (set adviser) a few days before the set. All sets are facilitated by the programme leader and membership of the action learning set is expected to remain the same for the duration of the programme. Sets meet to discuss issues raised by set members using Action Learning techniques. Within a week following the set meetings the participants are asked to reflect on their learning and send the reflection to the programme leader who then circulates this to the rest of the group. The process at the action learning set tends to follow a pattern of:

- *Exploring reflections on learning from last time and action taken*
- *Identification of issues to discuss*
- *Agreement of what will be discussed and priorities*
- *Brief recap of process of Action Learning*
- *Discussion of issues'*

This set comprised three women and four men. There were two light engineering businesses (owned by Alan and Henry) a livery business (also owned by Henry), a veterinary practice (Sue), a distributor of commercial washing machines (Pete), a beauty products distributor (Jayne), a telecommunications business (Tony), and an independent health and safety trainer (Nicola). The set adviser was Pamela. The age range of participants was from late twenties to late fifties.

The meeting commenced with a general discussion of and reflection upon the previous few months of working in the set. There was much talk of 'strategy', 'growth' and 'plans' although not all participants took themselves too seriously:

Pamela *'Have you got a business plan?'*

Jayne: *'Not in your terms!'*

Stage two of the meeting involved participants presenting the issues they wished to discuss that day resulting from them studying the slides sent out by the set adviser or as a 'burning issue' in their business. Each set member offered a problem and Pamela informed the group that Alan, who was going to arrive late, had a problem which had to be discussed by the group. Pamela reminded members of the nature of action learning and the approach which she expected them to take during the meeting. In doing so, she set the rules of which she reminded them throughout the meeting:

Pamela: *Insightful questions, how, what, when, why. Give people time to think; be sensitive. Anything else?'*

Sue: *Don't give solutions.*

In setting these rules, the set adviser influenced the way the group members talked to each other. She was encouraging set members to take a questioning approach and by the continued use of the first person plural (*we always say, don't we, that...*) promoted a genre of speech of a team meeting with its undertones of inclusivity and common purpose.

Group members then presented their issue. Pete's issue involved setting up a distribution system for Chinese washing machines in Europe. Pete outlined the background to his issue by talking about *'segmenting markets'* and *'finding distributors to fit the business needs'*. The rest of the set followed Pete's lead and adopted his strategy discourse; the tone of the discussion was intense and lacked humour, prompted by Pete's seriousness and seemingly aggressive stance: his expressions conveyed his awareness that he was operating in a cutthroat market: *'I want a hungry boy...'* some members of the group opted out of the discussion in its later stages. I felt there was a fair amount of machismo in Pete's presentation and the subsequent discussions. The 'hungry boy' image was very powerful; it shaped the conversation around Pete's issue by portraying the kind of business he is in and perhaps the type of person he is. The inference from

his stance was that he himself was a 'hungry boy'; that he would survive in business because his desire to succeed was greater than others. He gave clues to the rest of us as to the type of answers he was seeking and the kind he was likely to ignore. Pete sat with his arms folded much of the time, giving the message that he was unlikely to accept that anyone besides him had the answer to his problem.

Jayne's issue centred on a problem she had with a member of staff who had taken a part-time evening job which Jayne considered to be detrimental to the employee's health and her performance at work. Jayne introduced the problem by talking about how she instigated a chat with the employee to voice the concerns she had. Jayne talked about how she viewed the employee as a '*member of her family*' and that she was '*worried about her health*'. The tone of the discussion was much softer than during Pete's airtime; it felt like a group of friends discussing a personal problem, listening to her concerns with empathy.

Alan's problem involved his works manager who was feeling threatened following Alan's decision to headhunt a new production director (there was little to differentiate the roles). Alan wanted to know what to do with his works manager: '*How to calm her down*', he thought perhaps he should '*send her flowers and chocolates*'. When he was asked how his works manager might be feeling, he replied, '*You're a woman, you tell me, I can't follow her mind!*' Alan assumed that he was being straight-talking and humorous and two of the men in the group followed his jokey lead and engaged in verbal banter with him and each other. The women in the group were much more focused on resolving the problem. Alan supposed that he was '*backing two horses at the same time*' by bringing in a new production director. He characterised women as being nervy, unpredictable and difficult to understand and manage. There are two ways to interpret Alan's behaviour; he either genuinely believed that the works manager and the production director could work together and the works manager's response was unreasonable. Or, he really could have been '*backing two horses*' – appointing a new production director with the intention of eventually sacking the works

manager if the appointment turned out to be a good one. Alan seemed to quite like the image of himself as a gambler and a risk taker; it served to reinforce his status as a boss and an entrepreneur.

Alan often lifted his head back and smiled during the discussion of his problem. He also lifted his hands palms-up as if to say 'I don't have a clue' when confronted with a difficult question. His refuge was in humour and these gestures served to reinforce his mirth at his predicament of having to deal with an emotional woman. In the face of such 'humour' and of these exaggerated poses, other members of the group found it difficult to confront him. Alan's opinion of women may have resonated with others in the group but no-one openly agreed with him on these points although most people smiled at his jokes. I felt as though most of us knew he was 'crossing a line' but would neither condemn nor condone him.

Henry's issue was about expanding and developing his livery business which was co-owned by him and his father. He was trying to persuade his father to invest money on the business. Early on in the discussion, Henry faced a barrage of questions which appeared to make him feel uneasy. Henry, it seemed, wanted some time to think about his issues but the group were exhorting him to take action. It did not become clear until late into the discussion that this was more than a simple business problem but was rooted in Henry's relationship with his father. However, none of the group members sought to change the way they questioned Henry after this was revealed. Henry's face became increasingly flushed and his answers to questions more disjointed. There was no apparent resolution to his problem.

As Alan's issues had taken up so much of the allocated time, Sue agreed to defer discussion of her problem until the next meeting; Nicola arrived with only thirty minutes of the meeting remaining.

The Facilitator's Role

Evidence collected in the course of this research suggests that action learning facilitators or advisers adopt a range of styles. The two learning set advisers mentioned here, Paulette in the Cheshire set and Pamela in the East Lancashire set, used different approaches to engender learning. Paulette's style initially appeared harsh and her abrupt manner could have been disconcerting to the uninitiated; she frequently interrupted set members in an attempt to bring their focus back to their question and their proposed action. However, this style ensured that learners were not allowed to avoid difficult issues. Paulette often used the tactic of repeating words or phrases back to learners as a way of encouraging them to examine and question their thoughts and feelings. Pamela had a contrasting style with a keen focus on process; she generally asked very few questions about the issues, preferring to interject with contributions such as, *'When are we going to build on the question of the market?'* and *'Is the pace of questioning ok for you?'*

Despite both Paulette and Pamela prompting critical reflection in certain members of their respective sets, there was one individual in each set who was treated dramatically differently by their adviser. In Paulette's set, Annette arrived late and, as previously reported, appeared to be something of an interloper in the group. Annette was not one of the middle class women who formed the majority of the group and there were obvious differences between her accent and appearance and those of the rest of the group. The fact that she tried to either lighten the mood of the group or disrupt it with light-hearted and at one point, crude, comments seemed out of step with the general tone which was fairly serious and professional. It was obvious (to me but perhaps not to Annette who did not appear offended) that Paulette had little time for her. Annette received minimal eye contact and little acknowledgement of her contribution. By the time Annette's 'airtime' came around, only five minutes of the scheduled meeting time

remained; she was allowed to talk without interruption for about ten minutes and then there were two perfunctory questions from the set. Paulette did not interrupt Annette to ask her any questions. The rest of the group talked about Annette after she had left and Paulette joined in with this discussion which centred on Annette's inability to contribute to the group and her failure to understand action learning.

Pamela's behaviour towards Alan could be described as fawning. It became evident as Alan's airtime progressed that Pamela was also Alan's coach. Pamela had already discussed the works manager problem with Alan and suggested that he bring it to the action learning set. Pamela emphasised at the beginning of the meeting that Alan was going to arrive late and had a 'very important issue' which he wished to discuss. The data already provided describing Alan's airtime show that his language and attitude are blatantly sexist yet he was never challenged by any member of the group about this. I suggested to him at one point that his actions towards his works manager could be construed as sex discrimination by an employment tribunal; he laughed this off. Pamela failed to challenge Alan in a critical way and the rest of the set followed her example; I remember feeling very uncomfortable that this was happening in the name of action learning.

It would appear that both Paulette and Pamela adopted a completely different approach to one particular person in each of their respective groups. Paulette's behaviour seems to have been prompted by a personal dislike for Annette which could have been based on Annette's class and her general demeanour. This may well have been reinforced by the rest of the group's antipathy towards Annette or it may have been that the group picked up on Paulette's attitude. Paulette let her dislike for a set member interfere with her responsibility to treat learners with respect. Pamela's obsequiousness towards Alan may have been based on the fact that she relied on him as a source of income; he alluded to his wealth on numerous occasions and for me, he evoked an image of a 19th century factory owner; an old-style omnipotent entrepreneur who no one should dare to question.

However, in doing so, Pamela was blatantly falling short of the facilitator's obligation to play the role of critical friend in that she lacked any critical edge as far as Alan was concerned.

Individual learner accounts.

Five narrative accounts are reported here. I have chosen them because they exemplify the five themes or 'modes' of learning which emerged from the data collection, namely:

- 1) Non reflective-learning; James
- 2) Learning as mutual support and business growth: Shirley
- 3) Learning as confidence and identity building: Sean
- 4) Learning as a reality check: Susan
- 5) Learning as finding courage: Ernest

In all but the first category, learners reported experiencing critical reflection in a way which would be recognised by Mezirow (1990) and Reynolds (1998). Examples of these experiences will be discussed after each category is discussed in turn.

1. Non reflective learning

James has been running his own business for fifteen years. He designs and manufactures electronics products; his current biggest customer is the local passenger transport executive for whom he is producing the electronic components of 'talking' bus stops. We met in his office in the factory, located in a run-down part of Salford. From the outside, the building could be mistaken for being derelict and inside, conditions were spartan. During the interview, there were constant interruptions from his shop floor supervisor and his accounts clerk

who were asking James for decisions. James looked harassed; he appeared unkempt and overburdened. From the beginning of the interview, he left me in no doubt that his was a tough marketplace to be in, where customers wanted top quality at the lowest price and were not prepared to pay significant development costs. He told me that the business had never done particularly well, but they were 'still here' employing between ten and fifteen people.

James has been a member of his learning set for twelve months and has attended all but one of the meetings. His group is relatively small with six members and this created a problem when only three or four showed up for meetings (this happened quite regularly). Halfway through the twelve month period that the set was established for, new members were introduced to try to counteract this problem. However, this brought its own issues of changing the group dynamic and the necessity to re-establish trust in the group.

I asked James what he gained from the experience; he started off quite positively:

'It gives you somebody else's or a group of people's take on what you should be doing, whereas normally people have got an axe to grind or you're buying from them or you're selling to them'.

James evidently has learned through harsh experience that:

'(normally) people don't share their information, well you can't believe what people tell you, you don't believe what your staff tell you, you don't believe what your customers tell you, that sounds harsh but they've usually got an angle on it'.

James likes the fact that other members of the learning set do not have an agenda as far as his business was concerned and that this makes their advice and help more plausible.

James graduated in Electronics fifteen years ago and has never really been involved in any other formal learning since then. He has attended a few seminars provided by Business Link but confessed that:

'I'm not really patient enough to sit there and listen to them mutter, so I have but I just stopped getting involved, it wasn't worth it for me'.

Things weigh heavily on James; I asked him about his degree:

'Electronics at Salford, there's nothing left now, good university and it's all gone'.

Although James feels that some of the advice he received at the set meetings was useful, one particular aspect of the process disaffects him. The recorder assigned to the group was from the Chamber of Commerce and, in James' view, was there with the purpose of promoting the Chamber's activities and products. This proved to be a major irritant for James:

'I didn't go there to be sold to; from whatever corner of the world they want to come and sell to me, if I don't want to let them into my factory I'm not going to let them, I don't really want to go somewhere else and have it pushed down my ears either, if I want something I'll go and look for it'.

James talked about how this affects his behaviour in the group:

'He was quite a good bloke but he ruined, he spoilt that evening because you've got to become defensive, you can't be open, just as you've got to have them be open to you and give you their honest opinion, you've got to give them open information and if somebody's selling to you or flogging to you, it's not an open agenda, you've got to start putting the walls up'.

I asked James if he could think of any examples of ideas that he had developed in the learning set that had an effect on him or his business. He struggled to answer the question and conceded that it had helped him explore options but it had not significantly affected his behaviour:

'I mean in the end you run your own business, somebody else isn't running your business'.

James knows that he has a lot to learn:

'I mean there was one guy that after the first meeting I thought, well he's doing it all wrong because he's going through exactly the same problems as I'm going through and I know I'm wrong'.

In James' opinion, the changes in the group's membership have been a significant block to his learning:

'These new people come in and they upset the dynamics I suppose, they do upset it and when you first meet people of course you're much more cautious in expressing your opinions and so you don't express them you just think, he's a Wally'.

2. Learning as mutual support and business growth or survival

Shirley is based in Cumbria; she and her husband moved there two years ago when he was offered a job in the area. It gave them an opportunity to move to the Lake District which had been a long term ambition. Shirley is a graduate chemist and had worked for a 'lot of years' in the chemical industry before the move to Cumbria. She had often thought about starting her own business, but the comfort of her secure job had always pulled her back from the decision; now it was almost forced upon her. Shirley had worked in corporate communications for her former employer and her experience was in crisis management, emergency planning, media relations and internal marketing communications. She was given some freelance work by her employer and has since built up a good client base mainly working in media relations; 80% of her work is now for Cumbria-based clients. Shirley has achieved this in the space of 18 months.

Most of Shirley's work has come from contacts she has made whilst networking and initially doing some work for no charge which gave her some good coverage in the local press. She has also done some voluntary work with Cumbria Deaf Association through Pro-Help, a scheme which pairs off professionals with voluntary organisations. Shirley's initial work came from existing contacts in Cheshire but she has since built up a local client base and 80% of her invoicing is to Cumbria. Shirley is an avid networker and has concentrated on building up contacts to grow her business:

'I did some work for free early on. I came across a lady who was setting up a business ... and I said well your timing is right ... I am happy to do some press work for you for free ... and it was a good story, and I knew that it would help me get in with journalists ... So that is what I did and she got some super coverage, partly down to me ... and meant that the journalists had begun to know I am there.'

Shirley enjoys the variety of work that she now has but struggles with the unpredictability, so getting the balance between generating new work and dealing with existing clients is sometimes a challenge.

There are eight members (all women) in Shirley's set; all of the businesses were start-ups and working in quite diverse sectors. The funded, 'official' meetings with a facilitator had finished two months before, but the members decided to carry on meeting on a monthly basis:

'We had enjoyed the fact that we had really got to know each other very well and enjoyed just having that time to set aside to think about what was going on and to share issues with each other and to help each other out.'

Shirley spoke about how she experienced vicarious learning as a result of being in the set and how it was useful to set some time aside to think:

'You tended to learn from other people's issues as well as your own anyway, rather than it being just your bit and it was quite good to think, I think that was the main thing' .

Shirley gave an example of an outcome of her thinking time in the set:

'I think one of the most useful things for me was at the very beginning of the new year we started the session by having us write down where are we, where do we want to be by the end of the year, what are the priorities for this year and I realised that I had not done that and yet in a bigger business of course you would do that ... (I realised that)I can charge very competitively (locally) ... because it is slightly subsidised by some of the ... corporate work I do and I realised I had got to be able to ... generate that corporate work ... (because)without it the other work would be threatenedlooking back on it now I hadn't thought that through'.

Shirley kept returning to the theme of how action learning helped her to deliberately put time aside to think about where her business was going and

reflecting on successes and failures and planning ahead. She talked about how, when she worked in a large organisation, there was a clear delineation between her work and personal lives but now that she ran her own business, life and work were much more integrated. This seemed to be the case for other set members too:

'Sometimes some of the things we were discussing were as personal as they were about the business because it was hard to separate the two ...it became quite personal ... I it was about the people who were there and how they were juggling everything else. It was very helpful but it did occasionally feel uncomfortable because you found yourself with people discussing issues and their issues were much more personal than business. It became about the people rather than ... their job'.

A major learning point for Shirley was in the re-evaluation of her skills and the ability to view them as a customer might:

'There was one fairly late night when I realised that something that I could do very easily (which) was a real problem for someone else ... they were ridiculously grateful and it dawned on me that something like that that I take for granted ... it was actually something that other people didn't feel they could do and having somebody suddenly say yes I can put that into words was like wow'.

Mutual support emerged as a key issue for this group; a diverse group of individuals working together, supporting each other but neither judging nor pushing each other into doing something they felt uncomfortable with. Running a start-up business in Cumbria can be an isolating experience: Shirley related how a few members of the set were farmers' wives who had set up businesses through a dire need to bring more income into the home whilst their husbands continued to work eighteen hour days:

'We ... helped each other out and certainly a couple of people I think felt very on their own in their businesses ... I think when you are somewhere like this ... you have got other people around but nobody else who is particularly bothered about what you are doing ... having the time to sit with people who are wanting to know what happened about that and how is that going is good'.

'It was that mutual support and feeling that you weren't the only one with a problem, realising that we had several answers and none of them were right or wrong, just different and it was quite reassuring'.

3. Learning as confidence and identity building

Sean specialises in marketing and management strategy, helping organisations to 'create competitive advantage' His background is in engineering as the marketing director of a small division of a group of companies until he was made redundant. His clients are from a range of sectors and are of all sizes – from a one person psychotherapy business to engineering companies with a 15 million pound turnover. He has been in business for just over a year and admits to feeling 'quite disappointed' with the acquisition of new clients in his first year which is why he thought that action learning might work for him.

Sean is part of a set in Bolton comprising two women and three men from a range of business sectors. Sean described the main benefits for him:

'Because I work on my own it's a non-competitive environment to talk about business and bounce ideas and talk to grown-ups without sort of actually looking to get fee-earning work out of it and some good ideas, different points of view. It's also imposing a discipline on me in that each month I've got to go back and say what I've done because I would imagine it's a bit like Alcoholics Anonymous where you sort of sit in a group of people and it's not just mental and you report back, if you say you're going to do things really you've got to do it and one think ... I've got out of it specifically was networking which clearly is the way to develop my business and through the group I've really, really got very busy on networking'.

As a result of being in the group, Sean has taken a much more focused and targeted approach to finding new customers. He has also joined a (public) speaking club along with another member of the action learning set as a way of improving his networking and marketing skills; something he said he would have 'avoided at all costs' before joining the set.

I asked Sean to give me an example of an issue that he'd taken to the group, and to tell me the story of what happened to that issue and what happened to him in talking about it and getting some help with it.

'Well if we take the public speaking one, I mean I've done it for years and dreaded it, hated it but had to do it but the thing about working in your own business, you can tailor your comfort zone to suit yourself so obviously that is the way that I've avoided it and no-one's forced me to do it but talking about it in the group, it's obvious really, sort of discussions along the lines of, well you know it's going to help if you get involved in seminars, possibly joint seminars with people doing complementary services but you're not doing it, it's because I don't want to do it, it's because I'm not confident in doing it so ...(I'm) do(ing) that's going to boost your confidence, so that's what I'm doing'.

I asked what was it about the set that made him do something that he really didn't want to do:

'Because a group of people made me face up to the fact that I was cutting off a very positive way of growing my business'.

He also said that now he had started with this course of action that he felt a responsibility to follow it through.

Sean talked about the way his set worked and his main observation that members of the group challenged each other. I asked him to talk to me about how action learning compared with other learning that he'd been involved with:

'This is less structured, possibly more challenging in some ways because you can get personal skills as well as your academic skills which is very different ... and there's a lot more to get out of it I think because socially the group's developing quite well and ... we can help each other work-wise specifically by pointing work in each other's direction because we all do different things, that's not the main reason for doing it but that's a side benefit'.

We moved onto talking about feeling uncomfortable in the group. Sean referred to the discomfort he felt in watching somebody else in the group obviously struggling with a number of business and personal issues. I asked him if he had

ever felt uncomfortable himself because he had been made to think or act in a way that wasn't comfortable or normal for him:

'Yes, I mean the whole business that led to me talking about developing the business is pretty uncomfortable because ... it is somewhat ironic and somewhat embarrassing ... a good friend of mine has got a carpet business but his house is a disgrace and I think it's the same problem.'

So why was Sean prepared to undergo this discomfort?

'I think it's possibly the mix of people but it is a non-judgemental group of people where there aren't any rules basically, you just go and sit and discuss and I think there's a general feeling that we're helping each other'

Sean admitted to being a 'closed shy sort of individual' who had not previously enjoyed talking but acknowledged that this was the main way in which he was learning to change his behaviour. He talked about a time when talking helped; he likened it to

'Vocalising your own stupidity in a way and you can't not do something about it.'

And how that talk might lead to action:

'It's almost the realisation that I'm sat here saying this and I'm not doing anything about it ... and there are people there, you're being witnessed in your own stupidity and I think there is a responsibility if people are prepared to care about it and spend time talking about it, you can't not do anything about it, I mean there is a mutual responsibility within the group.'

4. Learning as a reality check.

I had gleaned something of Susan's background by attending the set meeting (the 'Cheshire' set) but the interview which I carried out with her revealed much more. Susan had previously been Worldwide Communications Director for a prestige car manufacturer; her particular expertise is in public relations and crisis management. Susan now works as a consultant to clients in a wide range of businesses including the automotive industry. She also has other interests:

'I do quite a lot of charity work, I'm a Princes Trust mentor and I'm a Listener ... one of these telephone charity services you know, people phone up for help and it's helped me a lot ... asking open questions rather than closed questions.'

Susan had been divorced two years earlier and she and her twin eight year old daughters had been living with a new partner until she found out that he was also living with another woman at the same time. Her time as a member of the learning set meeting coincided with her trying to sell the marital home (the 'Sunday Times, *Property of the Week*' at one time). In the three months that had elapsed between the learning set and the interview, the house had been sold and she and her daughters had moved into a much smaller property.

Susan is in the process of starting a venture with a new partner, aimed at helping women in business to appear and feel more self confident and to acquire and develop networking skills. There was something of a missionary zeal in Susan's description of how they planned to help women overcome obstacles to success, both in the corporate world and in SME's. She spoke about it with passion and she alluded to a number of episodes in her life as a corporate high flyer in which she felt disadvantaged as a woman:

'Well on the confidence side, a lot of people do have to fake it because to be really, really super confident head to toe (is difficult)... if you had that client or your boss saying, oh Susan can you come into my office, what's the first thing you think, what have I done wrong and that's an absolute lack of confidence, that's all it is'.

Susan first heard about action learning from a Business Link adviser who gave her a list of names of women that she could call and get advice, guidance and ideas and one of the women was already on the programme and recommended it to Susan. During the first meeting, Susan felt quite uncomfortable but decided to listen and decided to commit to attend the next meeting because she liked the way in which there was such a clear emphasis on taking action rather than just talking. However, Susan admitted to feeling like a '*kind of an outsider*' at the first

couple of meetings because the process was new to her and because of the personal nature of some of the discussions. She also revealed that:

'I was at a difficult point in my life then and I think that probably had an effect as well and for me it was different, I had a very senior position in corporate life and to suddenly be in a village hall in the middle of nowhere talking to a group of women about their problems, I was kind of thinking, what have you come to and what are you doing here but I was interested in the process and interested enough to go again the following monthand my life has kind of changed fairly quickly in the period of time that I've been attending; the second one I went to was useful and what I did like was that the group...were quite challenging and digging; ok so now explain why and just trying to peel away those layers to get to what is the problem'.

Susan talked about the 'discomfort' of being in a set;

'There's a level of discomfort in there because it's always somewhat uncomfortable being pushed further than you're used to pushing yourself especially with people who don't know you and who you don't know and although it's about business, it's not really, it's about how you are reacting to business, your situation and why and so on and I think it should be uncomfortable to be effective, I mean I think if you're just sitting there having a glass of wine and chatting you're actually not going to get very far ... there was a point where one of the girls was almost in tears, not because anyone was being beastly or bullying.... but because she was suddenly having to confront things that she hadn't had to confront before and there were a couple of times (when) I had to confront myself and I thought, well I've got to really sit and think about this one, what is the underlying issue here that I've got to deal with?'

Susan suggested why she thought action learning worked:

'(It's about) how you ask a question without being presumptuous, how to try and draw the person out of themselves without assuming you understand where they're coming from and without having to put your views upon them.'

'There was a time when I just thought, oh yes actually I haven't thought about why I'm no good at doing this particular thing, I've just kind of thought, well I can't do it so I'm not going to do it and I think this process made me think, well why can't I do it? Let's really rationalise that or let's get to the root of why and then rationalise that and then the issue starts to become less of an issue for you to think about different ways that you can tackle it'.

And how she thought action learning had changed her:

'I'm a big mouth, I'm always in there, I want to talk, I want everyone to hear what I've got to say and action learning made me just shut up completely and stop and listen and not say anything or ask any questions until I'd really thought through what on earth was going on here and I think the group's response to me was, gosh well she's somebody that doesn't really say much but when she does it's really considered and it's a very good question and that's something that I've really been sorely lacking before...it would be very easy to slip into typical management mode with everyone shouting to get their voice heard.'

5. Learning as finding courage

Ernest is one of three directors working in a family business in the Lake District; the fifth generation of the same family in a business which was founded in 1858. It had always been a timber business but the directors have recently started diversifying its product range and moved into the hot tubs and spas market. The focus of the business is now on garden leisure and the manufacture of timber products for the garden covering the South of Cumbria and North Lancashire. They currently employ 16 people, three of whom were appointed to full-time contracts last year. In addition to manufacturing and selling timber products, there is a coffee shop and plans to open a small museum looking back at the history of the business and also looking at local industry and local heritage and historical interest sites.

Business is fairly good. Although traditionally a very low margin business the directors have tried to add value to it over the last eight years by introducing more high-margin products into the mix, Although the location is spectacular in terms of scenery it does not lend itself to volume business and whilst they have a regular and fairly loyal client base, attracting new business is always difficult and trade is highly seasonal and weather-dependent.

Ernest is keen to develop himself and the business; he has spent the previous

four years working through the Institute of Leadership and Management courses to diploma level and is now actually teaching on a course at the local college. Ernest left school after 'A' levels, didn't go to university but now in his late forties, is rediscovering his desire to learn more, he had 'got the bug' so when approached to join the action learning set, he jumped at the chance.

I asked Ernest what he thought of action learning:

'The whole process I've found to be a fascinating process ... I remember the very first set ... quite well. All I can say is it was a very powerful experience, not for me but for the guy that decided to take the hot seat as it were ... he was facing quite a lot of crisis in his business and his personal life and none of us knew each other at all and I've been in various groups over the years and it's taken quite a while for people to open up to the depths that we got to on that first occasion and I came away feeling..., it was quite an emotional roller coaster ride for me and I was only asking the questions to the guy who had the issues ... when you talked about it, it sounded a little bit like a ... discussion group and the actual outcome of it was much more dynamic'.

Ernest talked about how this approach was replicated in the rest of the group:

'He came back with ... an incredible story of transformation in his perceptions (of) ... the crisis that he faced at the time ... his way of being able to deal with it was much clearer and I think the key was that it wasn't so much that the crisis went away, it was just that he was actually much more equipped to go back and face that crisis with a much more positive outlook which I think is the one thing that seems to have come out of all the sessions, is that if people have got issues which are crises or which are problem issues, it isn't so much that the problem changes, it's just that the perception of how they're going to deal with it is different and usually more positive and also more proactive rather than being, what am I going to do about this, you go back and say, I'm going to do something this about this. I think that's the key, because sometimes in business when you're very close to the business and working in the business, it's very hard to ... see ... the wood from the trees and I think what this group does is, it helps you to draw back from being at the coalface and being right up against the problem and it gives you an opportunity to look at all the kinds of solutions that maybe you might not have considered before if you hadn't been asked the questions that people are asking'.

Ernest then went onto talk about the issue he had taken to the group; his part-time job as a teacher at the local college, which he very much enjoyed, was

beginning to affect the amount of time he could spend in the business and was therefore affecting his performance. His co-directors of the business are his brothers and his mother is the managing director. Ernest began to feel guilty about the amount of time he was spending away from the business and began to feel as if his loyalty was becoming divided between his own aspirations and the family business. As a result, he felt anxious about discussing his issue with his co-directors. The set helped him to face his problem and to talk to his brothers about how he felt and the implications for the business and their working relationship. The actual discussion with his brothers and his mother turned out to be much more positive than Ernest had expected; he talked about how being in the set made him take action:

'I got to the stage of saying ... 'I'm going to take the decision ... and it galvanised me into action ... it made me get on with doing all the things I wanted to do and things I'd thought about doing and not done because I felt for whatever reason that I was going to cause too many upsets if I proceeded with my ... heart's desire ... and it's turned out it's been a positive move, for me personally anyway'.

I asked Ernest to talk about how his learning set worked:

'(There) was a process of asking open-ended questions, some of which were quite challenging and deep reaching, people asking fairly blunt questions about my own motivation and my kind of ambition and also about the business and really some quite searching questions ... about my relationship with my mum particularly and my brothers and ... trying to unpack why I felt ... a bit in the business because I'm a family member ... and so it helped me to address some of those areas which perhaps I hadn't really spoken about before, so it was again quite an emotive issue but it was possible to explore those issues in that group because nobody there had an axe to grind and it was much easier for me to express things perhaps in that context than it would have been in a context where I knew people or people knew my family, ..So the process was, yes just very, very well phrased questions, open-ended, challenging, there was no discussion really, it was all questions and me answering the questions in an open and honest way as much as I could and then obviously a time of summary at the end and then a time for me to reflect and tell the group what I was going to do about it, so the action part came at the very end after I'd had time to reflect on the things that I'd actually thought through as I was answering the questions and then I said, I'm going to do a, b or c. I can't remember exactly what they were but there was three actions I think I chose to do and

I was going to tell my mum that I was going to apply to the colleges or further education organisations for a part-time post, so I did all those things and I think the process helped me to get to the stage of deciding that my desires to do those things were sufficiently strong enough to go forward at that point and just get on with it really and take the risk element out of, not take the risk out of it but to face the risk and to take the risk on rather than not take it on'.

I commented on the level of self-disclosure which there seemed to be in his group, Ernest agreed:

'It's been quite a remarkable thing really because I think certainly in British society generally you don't find that kind of openness, you certainly wouldn't get that kind of openness around a pub table even after a few pints, not to the same degree anyway

'This action learning group certainly has surprised me in the way in which all of a sudden you are ... baring your soul to complete strangers ... I really don't know how that works, whether it's just the fact that a) you don't know people and there's nothing to lose and b) you having committed yourself to the group, there obviously are ground rules of confidentiality and so on which you'd expect in that kind of a group and ... the dynamic of the particular group that I'm in, there seemed to be a high level of trust from the word go'.

I asked Ernest about to talk a little more about the process of action learning:

'There were certainly ... questions which provoked in me a deeper reflection than perhaps had done before particularly in relation to my relationship with my mum and my brothers in terms of how I felt about being trapped or my ability to be able to address those issues with them, I hadn't really gone into that side of it too much but I think it's one of those things that you're aware(of) in the background that's an issue that you have to address but you kind of, because it might be painful or might be difficult, you prefer not to think about it too much ... I hadn't unpacked it in anywhere near the depth in terms of, out loud anyway, to the depth that I was able to do whilst I was in the group. So that whole process certainly was, therapeutic isn't perhaps the right word or is it?'

Identifying learning at three levels

Whilst I have been conscious so far not to separate the data from the person in a

deliberate effort to relate accounts which capture the essence and the flavour of the action learning experience, I now attempt to pick out some examples of level 1, level 2 and level 3 learning, using Burgoyne and Hodgson's (1983) framework, based on Bateson's (1972) original work around levels of learning:

Burgoyne and Hodgson take Bateson's original work (described in Chapter Two) and interpret it for their use in the following way:

'Level 1 learning occurred when a manager simply took in some factual information or data which had an immediate relevance but did not have any long term effect on their view of the world in general...

Level 2 learning...was when a manager apparently 'learnt' something which was transferable from the present situation to another. i.e. he had changed his conception about a particular aspect of his view of the world in general; the aspect in question being...situation specific.....' (pp393-4)

Level 3 learning was when a manager seemed to 'learn' or become conscious about his conceptions of the world in general, how they were formed, or how he might change them. Level 3 learning is therefore not situation specific (p.395)

Examples from the data collected in this piece of research are given below. These data are taken from interviews and learning journals.

Level One learning

Level one learning is about acquiring factual information which is useful in the 'here and now'. Much of the evidence of level 1 learning came from learning journal entries, in answer to the question, 'What did you learn today?' Many respondents felt that this question was asking them to provide a piece of 'knowledge' that they had acquired:

'I learned about the planning required for effective selling' (learning journal entry).

'There is European funding available for some projects and that this may help with the translation of my resources' (learning journal entry).

'A better understanding of recruitment and motivation' (learning journal entry).

'The need to address speculative letters to individuals' (learning journal entry).

'Identifying the strengths and weaknesses of my knowledge-based product' (interview).

'Approaches to training and development...and discussing what was on offer for young people' (interview).

"How we go about recruiting decent welders" (interview).

'I picked up a speeding fine for the first time in 30 years and one of the ladies told me about a special machine that...sat on the dashboard and warned you as you were coming up to speed cameras' (interview).

Level Two learning

Burgoyne and Hodgson (1983:394-5) found in their study, which encouraged managers to 'think aloud' while doing their work and then 're-live' episodes soon afterwards, that most learning occurred at level 2. This is the level at which transferable learning takes place. There are five types of level 2 learning:

1. *'Specific learning incidents ... after which managers feel explicitly 'wiser' ...*
2. *Evoking and extending personal 'case law' ... referring back to 'learning incidents' in their personal histories.*
3. *Gradual and tacit change in orientation or attitude on the basis of cumulative experience.*
4. *Deliberate problem-solving and learning.*
5. *Reflective learning ... no particular external stimulus seems to be critical to this process other than just time and 'space' to do it'.*

Examples of level two learning from this research mainly focus on the opportunity to have some reflective time and space to talk about specific incidents and how they might learn from them:

Ron was talking about how he had appointed a new Sales Manager. Having poached him from a competitor after travelling with him several times, Ron felt that he knew him well:

'I was probably quite shocked that I had made a mistake ... I really couldn't accept that I had got it wrong ... everybody had some input ... and I realised I didn't consider (the views of my staff) ... and I was blinded.'

Jo was talking about how she sought help with a decision she had to make:

'I decided not to continue (with a project). I hadn't decided really and as I was talking it through and getting reactions ... I thought, I've made my mind up here, haven't I? I've worked this out for myself by having the opportunity to verbalise it.'

Burgoyne and Hodgson reported that level 2 learning was the most prevalent in their study of 'natural' learning. This was clearly not the case in this study.

Level Three learning

In contrast, level 3 learning was comparatively rare in Burgoyne and Hodgson's study, yet during the interviews carried out for this research, it was the most common. Level 3 learning encompasses a person becoming more aware of their conceptions of the world (including themselves) and how these might be changed:

'A realisation that despite having a jolly good reason for 'holding back'. The real barrier was me.' (learning journal entry).

'I learned to face my fear of presenting which is inhibiting the growth of my business.' (learning journal entry).

'When I shared with John that it was time to 'get from behind the desk' and take on the world, I realised that I needed to do the same.' (learning journal entry).

'I looked and saw just what a mess my life was ... I don't have hobbies, I only socialise from a business point of view. I don't take any holidays ... and that is when I started to make those changes.' (interview).

'(There was) a realisation that the playing card idea could actually work and some of my... self-imposed barriers to it were just knocked down.' (interview).

'I had to try and learn to be a bit more decisive and not to try to over-think a problem... and to try and work on facts rather than assumptions.' (interview).

'(I realised that) it's a numbers game ... it's always going to be a small percentage of those you convert ... some of the suggestions he was making ... put me on the spot and made me feel a bit uncomfortable but it was good, it was good for me to be in that situation.' (interview).

In the next chapter, I offer a series of reflections on the research methodology in the light of an analysis of the data.

Chapter Five

Methodological reflections

Introduction

'Persons are always in relation ... one cannot study persons without studying the relations they make with others ... And the method used to observe must be one that allows us to study the personal form of relating ... the observer, with the co-operation of the other, constitutes himself as part of the field of study, while studying the field he and the other constitute ... (The researcher) must be able to reflect upon and reason about, a reciprocity that includes himself as one of the reciprocating terms' (Rowan, 1981:167-168)

In setting out to examine and locate the social dimensions of learning within the 'black box' of action learning, I initially underestimated how much I would become a part of that learning process; both as learner and facilitator. Although I intended to take a reflexive, self-conscious approach so that I would be fully aware of my impact on the research and the data produced, I did not fully understand the nature of the reciprocity described by Rowan (1981) above. Traditional conceptions of the researcher-as-scientist weighed more heavily on my psyche than I realised: I imagined myself able to go in and retreat with data, carefully conscious of where I had influenced proceedings. As my research progressed, I felt an emotional attachment to the project and to many of the people I interviewed; a responsibility for not just reporting their narrative accounts, but to also help them make sense of it.

I set out to gain a 'flavour' of what was happening in the action learning sets through participant observation in a number of meetings and to then subsequently interview individual learners. I originally intended to carry out some form of discourse analysis of the interviews but this proved difficult given the 'dialogical' nature of my meetings with these learners. The outcomes, in terms of

data created, are two accounts of action learning set meetings and five individual narrative accounts of the experience of action learning, each exemplifying a particular theme. In this chapter, I offer my reflections on being a participant observer and I also explain how, with retrospect, what I was actually doing in the interviews was a form of 'social poetics' (Cunliffe, 2002b) rather than a more traditional qualitative interview.

Learning, researching, sensemaking and storytelling

As a researcher, I situate myself as a co-learner with subjects. Rowan (2001:121) writes about research which entails treating people as if they were human:

'This means that as researchers we do not hide behind roles. We take reflexivity seriously; and by this we mean that what we find in research may be applied to us too. It also means we do not exclude ourselves from the research process.'

This authentic approach to situating oneself as a researcher seems to be the first step in honestly engaging with subjects. It carries an underpinning commitment to ethical research practice. However, it can often be more concerned with scrutinising one's behaviour and how this affects research outcomes (implying some degree of detachment) rather than a truly collaborative process. Heron and Reason (2001) suggest Co-operative Inquiry as an approach to conducting research *with* people rather than *on* people. However, their formula for Co-operative Inquiry dictates that everyone is involved in the design and management of the inquiry from inception through to sensemaking and drawing conclusions. It is a deliberate strategy which is implemented from the beginning of a project by the establishment of a co-operative inquiry group. In a similar vein, Appreciative Inquiry (Cooperrider and Srivastava, 1987) involves the co-construction of future visions with a strong focus on the positive as a way of stimulating transformational dialogue.

Co-operative and Appreciative Inquiry both suggest a method to be followed and both are used as an action research approach for organisational change. Their underlying principles of co-operation and positivity sit well with the approach taken here and although the research process evolved rather than following a formula, the spirit of Co-operative and Appreciative Inquiry was adopted.

The 'Researcher as Learner' was a strong motif in this piece of work, echoing themes from action research and collaborative inquiry. A consciousness of my own learning was inevitable as I was studying how others learned. However, I was not new to the field (of action learning) so did not have to:

'Learn the values, lore, codes of behaviour, hopes and fears, costs and rewards, sense of involvement ... and the like of another social world' (Stebbins, 1987:103)

This should not necessarily be seen as an advantage as my comfort with the process may have caused me not to remark on practices or events which, to an uninitiated observer, could be deemed worthy of further investigation. However, my familiarity with the values of action learning helped me to situate myself as a co-learner. This was an attitude rather than a stated objective at the beginning of the data collection phase, which was verbalised more as the research process went on.

If learning is seen as sensemaking, then the researcher's role is to help make sense of situations and data. Much of the sensemaking in this project went on in the action learning sets themselves but for some participants, the interviews provided a further layer of the process. Weick's (1989) 'tacit set of propositions' about sensemaking provide a useful way of examining the nature of the research interviews I engaged in. For Weick (1989) sensemaking encompasses the following ideas:

1. **Grounded in identity construction** (p.18)

This link between learning and identity construction has already been made. The talking 'out loud' that went on both in learning sets and in research interviews helped subjects to learn about and shape their identity in a number of roles (owner-manager; wife; husband; brother; learner; research subject; enthusiast; detractor). It also helped me to shape my identity as a researcher. Significantly, it helped us to co-construct narratives which made sense for both of us (and hopefully for others who subsequently read them).

2. **Retrospective.**

Weick (1989:24) contests that we can only create the future by understanding the past.

3. **Enactive of sensible environments** (p.30)

The environment in which we operate is not a 'given'. Our actions create that environment and, 'the concept of sensemaking keeps action and cognition together'.

4. **Social** (p.38): 'Sensemaking is never solitary because what a person does internally is contingent on others' (p.40).

5. **Ongoing** (p.43).

For many of my subjects in this piece of research, sensemaking was an integral element of their experience of action learning. It became clear to me, from my very first interview, that because action learning had helped them to learn through talking, the interview became another layer of the sensemaking process and what I was really doing was not collecting narratives but co-constructing the account of their learning. I give the impression in Chapter Three that I have collected narrative accounts and presented them here as a way of explaining what happens to people who learn through talk. However, this is somewhat disingenuous as I was an active participant in the interview; the process of learning continued, in many cases with their discussion with me; in that they gained new insights into it during the interview. This happened because, with hindsight, we were engaged in what Cunliffe (2002b) has called 'Social Poetics'.

One of the objectives of this study is to explore how managers experience learning and to specifically look at the phenomenon of management learning. A case study approach (Yin,1994) was considered but once the interviews had begun, it became clear that such a formulaic approach did not help to unearth the essence of the experience of the subjects. Rather than to dispassionately distance myself from the text created in an interview, I see myself as a professional and skilled helper. It's rather like being a midwife at a birth; sometimes it just happens and you step in only when entirely necessary, whereas others need more help with the delivery. The key is to stay 'tuned in' and to work with mother and baby or in this case, subject and narrative. It also serves as an example of Schön's (1983) reflection-in-action in that there is an intuitive approach to professional practice.

My feeling was that I was helping interviewees construct a narrative account of their learning journey. I have deliberately not labelled these narrative accounts as 'stories' as stories tend to have a set structure and form. At times, however, these accounts did take on a biographical form. Stories are a powerful way of helping others understand how individuals or groups have been affected by their experiences. The interest in the use of storytelling as a device for studying or bringing about individual and organisational learning is a by-product of the rise of postmodernism. There is an increased value on the role of stories in making sense of the increasingly complex problems organisations face. Stories can bring order and pattern to chaos and there is a universal appeal to a good story told by an engaging narrator. According to Bohm (1996) thought is a collective phenomenon and stories help communities to share and create common meaning through dialogue. Dialogue enables individuals to gain insights that cannot be accessed alone. In true dialogue, just as in our engagement in a story, we suspend disbelief and open our minds to new possibilities.

Gabriel (2000) points out that until the end of the twentieth century, stories were

marginalised and treated as folklore rather than as ways of making meaning. However, we should be cautious of the licence frequently taken by storytellers:

'Story work involves the transformation of everyday experience into meaningful stories. In doing so, the storytellers neither accept nor reject 'reality'. Instead, they prefer to mould it, shape it and infuse it with meaning ... through this activity, they shape their personal and organizational identities' (Gabriel, 2000:41)

Gold and Holman (2001) and Gray (2008) suggest storytelling as a device for engendering critical reflection in management development. The construction of arguments within stories is also considered to be a useful tool for critical thinking (Gold *et al.*, 2002).

In the case of this research, subjects did not necessarily construct stories and arguments; we engaged in reflective or reflexive conversations which I subsequently wrote up as narrative accounts of their experience of learning. The writing up element was the next stage of the sensemaking process for me and a way of offering a version of their experience to the readers.

The final part of my sensemaking journey was in returning to the literature after the interviews had been carried out. In the tradition of action research, I began to conceptualise the experience of action learning as I found it because the literature with which I had previously engaged seemed only to give a partial account of what I perceived subjects to be experiencing. So, with hindsight, my methodology should have acknowledged the possibility that the data collection and analysis could open up another stream of thought and literature which I had not previously considered to be relevant. This meant that there was a collision of the literature in which I had based my methodological stance and that in which I was searching for the theoretical basis of the study. In short, I became a reflexive researcher investigating the nature of reflexivity from within the phenomenon itself.

Language as epistemology

Cunliffe (2002b:129) situates language and discourse-based research methods in two broad categories:

'Those that take a monologic, objectivist stance and view language as epistemology (as method) and a second ... that sees our social experience being constructed through language, that is language as ontology (as being).'

In studies that view language as epistemology, language is viewed as something that can be transcribed and dissected. Alvesson and Kärreman (2000) illustrate this point in their empirical illustration of the various forms that discourse analysis offers the researcher in analysing interview data. The data are seen as ways of describing reality or the social system they operate in; language is representational. Having set out to collect interview data, something that worried me was the fact that in order to analyse the text of an action learning set or any other management learning activity, I would have to transcribe the spoken word into the written word. I had tried to push this thought to the back of my mind and convinced myself that others had done it successfully so why shouldn't I? It still did not (does not) feel right. Even if I learn the most complicated system of graphically representing what is going on in a conversation, I still don't think I can ever capture it on paper. If I were to analyse a letter or a journal article, I perhaps would not have this same misgiving because I would be examining the document in its original form.

The second problem is described by Parker (1999:4):

'As we read a text ... we ... produce ... another text which is a translation which can then be subject to discourse analysis'.

Here lies my real struggle; why should I assume that I know what these managers mean by translating what they say into written text and then analysing

that text, using my own frame of reference? If there were no other way to do it, then it could be a perfectly legitimate research method. However, there are other ways, the most obvious of which is to actually speak to managers and ask them what they mean. I'm assuming that I want a detached position as a researcher rather than engaging with the people I'm studying. Ironically, I may have done this because it seems to offer a more objective stance.

To be fair to Parker, (1999) he encourages researchers to be critically reflexive in the way that they as analysts become part of the text and to 'take responsibility for their activity in the construction of meaning'. In the deconstruction of advertising images or of the organisation as text (Höpfl, 1999), the researcher has no choice but to make assumptions and draw conclusions in a reflexive way. In my case, I need to be reflexive about the approach I am taking but remember that the text comes from living, breathing humans rather than inanimate objects.

The critique offered by Alvesson and Sköldbberg (2000) illustrates what I have come to see as the main problem of discourse analysis:

'Utterances are explained in DA by their effects, what arises from them, and not by the intentions or cognitive processes lying behind what is said or written'.

If this is the case, then I can never know what managers actually feel or know. I can only see the effects of their words which may, in turn, produce their own effects.

Another issue is the fleeting, 'once only' element of speaking as opposed to written text or images. In the latter cases, the researcher has the opportunity to re-visit the image or the text. Even if the spoken words are transcribed, the researcher is distanced from them by time and consequent fading or distortion of memory. Spoken words lose their flavour not only when they are written down but also when they are analysed retrospectively. They are utterly transient; any attempt to re-capture them is flawed.

Situating my subjects in the research: Reflection and reflexivity in learning

In the next chapter there is a discussion of Shotter's (1993) notion of practical authorship and Shotter and Cunliffe's (2003) 'relationally-responsive' view of social constructionism which is termed social poetics. This discussion forms part of the description of how managers learn, encompassing the idea of managers creating a jointly constructed social reality. Shotter and Cunliffe (2003) believe that managers who understand the social constructionist nature of their *meaning-making* actions are likely to become more critical of normative prescriptions and more aware of ethical and moral considerations. Although there was limited evidence to support this in the learning sets I participated in, these ideas about the co-construction of reality (or in this case, the co-construction of accounts of lived experience) were much more useful in explaining what happened in the research interviews.

Language as ontology

Cunliffe (2002b:129) offers social poetics as an approach to researching language as ontology and the:

'Relational, embodied, taken-for-granted nature of the process of intralinguistic activities'.

She does not offer as clear a formula or framework for collecting or interpreting data as other discourse or text-based methods. However, she does give some clues as to what to look for:

'Poetic researchers explore how the vibrant use of language – metaphor, stories, irony, poetic imagining, gestural statements and resonant ways of speaking – may construct shared experience and meaning'. (Cunliffe, 2002b:143)

What appeals to me most in this approach is that the line between researcher

and researched is blurred, meaning that the researcher is not cast in some expert, privileged role. We are almost invited to 'live' the research and to immerse ourselves in it without claiming an independent, external reality which is a given in many other narrative approaches.

Shotter (1996) proposes the following 'poetic methods':

- 'The use of metaphors, images, analogies ...
- The use of instructive forms of talk to move others, such as 'do this', 'look at that', 'listen', 'finish this by tomorrow' ...
- The use of forms of talk to reveal possibilities or new ways of connecting: 'imagine', 'suppose we look at it like this ...' 'think what would happen if ...'
- The use of gesture; pointing, shrugging, thumping the desk as we speak'

Cunliffe (2002b:138) adds 'resonance' to this list:

'In exploring responsive speech acts, resonance allows the listener to sense and maybe feel and connect with what those implications may mean. Is the speaker trying to engage with the listener's feelings in some way?'

Cunliffe (2008a) later adds a discussion of how irony and contradiction can evoke oppositional meanings and new understanding.

Radical reflexivity

Pollner (1991:370) suggests that:

'Intrinsic to radical reflexivity is an "unsettling", i.e. an insecurity regarding the basic assumptions, discourse and practices used in describing reality'.

Cunliffe (2003:991) suggests 'radical-reflexivity' as a way which assumes that all research is constructed between research participants (including 'researcher' and 'subjects'). Her explanation of radical reflexivity is useful:

- 'Questioning our intellectual assumptions;
- Recognizing research is a symmetrical and reflexive narrative, a number of 'participant' stories which connect in some way;
- Examining and exploring researcher/participant relationships and their impact on knowledge;
- Acknowledging the constitutive nature of our research conversations;
- Constructing 'emerging practical theories' rather than objective truths;
- Exposing the situated nature of accounts through narrative circularity;
- Focusing on life and research as a process of becoming rather than already established truth'.

Through social poetics, Cunliffe (2008a) claims that organizational members (in this case, owner-managers) constitute their organizational experience as they talk with others as a way of articulating new organizational realities. It is a process through which we make meaning rather than discover something about an aspect of the organisation. Social poetics, underpinned by radical reflexivity is not necessarily a way of finding answers to problems but it may mean that managers go back to their businesses and talk in a different way as a result of a conversation, in this case, a research interview. Meaning-making is 'in the moment' (Cunliffe and Easterby-Smith, 2004:37):

'What matters is not what you think when you speak ... but the interrelationship and impact of our words and actions on others'.

For the subjects in this research, this may mean finding new ways of shaping their own identity and that of their business. We also need to bear in mind the

need for SME owner-managers to contextualise their learning and to create subjective contextual knowledge in order to benefit from planned learning and development activities.

The interviews were reported as narrative accounts because they emerged as such; none of them was a question and answer session covering what they liked or disliked about action learning or what they thought the benefits and disadvantages were. Most of the interviewees seemed to value the opportunity for some space to talk about themselves; some conversations were predominantly reflective whilst others could be described as reflexive. Other conversations combined the two elements. I see reflective conversations as those which talk about events in a retrospective way and can be a description of an event coupled with some discussion of feelings about it whereas reflexive conversations create 'new readings of experience' and 'becoming more aware of how we constitute and maintain our "realities" and "identities"' (Cunliffe, 2002b: 36).

The next section illustrates how social poetics was used (unwittingly for a while) in the interviews.

Social poetics exemplified

After I had written up the data, I listened again to some of the audio recordings of the interviews, this time with a consciousness of social poetics. I have picked out a number of 'poetic moments'.

Sean's account has already been reported but some of it is worth reviewing here as he had several 'poetic moments' during the interview; these were times when he reached a realisation about himself or his learning. His talk was full of images and his facial expressions reinforced his feelings. Sean talked about how action

learning had helped him realise that he was not managing himself or his business very well. It was clear to me that the full extent of this revelation only dawned on him as he was talking to me. When he talked about 'vocalising his own stupidity' he looked embarrassed and then quite angry with himself. Even though he was talking to me, he was also talking to himself; looking around, with his palms up as if he couldn't believe what he was saying. He was reflecting on his actions from the set meeting but also being 'practically reflexive' (Cunliffe and Easterby-Smith, 2004) in that our conversation made him question some of his own assumptions and taken-for-granted theories. He used irony to mock himself – to emphasise his wake up call:

'A good friend of mine has got a carpet business but his house is a disgrace and I think it's the same problem'.

I did not have to say a great deal; I posed questions and listened, making it clear from the beginning that I understood how action learning worked and implying throughout that I empathised with him. I suppose I gave him some 'safe space' to make sense of what had happened to him in the action learning set.

Josh was the first person I interviewed. His account of the action learning experience has similarities to Ernest's; based in the Lake District in a family business, struggling to change the business because of the influence of his father who had established it and run it for over forty years. I was surprised at the openness with which Josh spoke. I gained a deep insight into his world in the two hours I spent with him. The interview was carried out in the office above his factory which produces high quality furniture. There was a back door open to some steps which led out onto a field and then miles of farmland. Josh's dog ran in and out of the office throughout the interview and his barking is clearly audible on the tape.

Josh talked about how 'somebody at the top can get very lonely' and how he felt he was full of 'tales of woe and non-sleep'. There was a genuine sadness in the

way he talked about how he felt before he had started implementing changes to the business, as a result of action learning. One of the issues he was trying to address was about forward planning and he likened it to a game of chess:

'It's like playing a game of chess, you can play the chess one move ahead or three moves ahead and as you get further down the line, you don't actually do anything because you...over-think'.

As the interview went on, Josh's demeanour changed; he smiled more and appeared to relax. He moved onto the part of his account that told of how he had decided on what the problems were and what he was doing about them:

'One of the weaknesses in my business was that it was too much me'.

'My aim ... (is) to be much more visionary and more creative and more entrepreneurial...rather than be cluttered up with the day-to-day things'.

It was interesting to notice that when Josh started off talking about how he had done things wrong, how he could not find the courage to confront established ways of running the business, he talked slowly, with minimal eye contact and little use of gesture. As his account became more hopeful, his body language changed noticeably. So although his use of imagery was not as rich as Sean's, his use of gesture, eye contact and facial expression emphasised the poetic moments.

Much of Ernest's experience has already been reported verbatim. The reason for using so many of Ernest's own words is that he painted such a vivid picture of how he felt; his use of images and analogies was very powerful:

- *'It was quite an emotional roller coaster ride for me'.*
- *'It helps you to draw back from the coalface'.*
- *'I began to knock on a few doors'.*
- *'I proceeded with my heart's desire'.*
- *'I felt trapped in the business'.*
- *'Baring your soul to a group of complete strangers'.*
- *'There was a point where a light bulb was switched on'.*

Ernest said at the end of the interview, after the tape had been switched off, how talking to me and talking about his experience was part of the reflection process for him and that he had gained new insights by talking to me about it that day.

There were interviews in which there were no poetic moments. One example of this is my interview with Bob who ran an accountancy business. Bob was very matter-of-fact in his description of his action learning experience; he falls into the 'Non-reflective learning' category. There was no passion in the way he talked about it and his manner was in stark contrast to Ernest, Sean, James and others. Bob did not seem to have gained a great deal from action learning and this may have explained the lack of any spark in our discussion. When he did use imagery, gestures and resonant language, it was to describe his job:

- *'I'm sow(ing) the seeds for future development'.*
- *'I've got 60 clients on board'.*
- *'I get a real buzz from it'.*
- *'Marketing is a whole new ballgame'.*

In all the cases where action learning had been highly positive or highly negative (i.e. for James), the interview conversation was filled with poetic moments; subjects talked in an inspiring and imaginative way. If they had not been touched by the process, their talk was generally fact-driven and descriptive.

Social poetics as therapy

'The whole process ... was therapeutic, isn't perhaps the right word for it'.
(excerpt from interview with Ernest)

Therapeutic was the word that had been going through my mind when Ernest had been talking about his experience of action learning. He talked about *'unpacking his feelings ... out loud'* which, for me had connotations of counselling or psychotherapy.

Shotter (1998) describes '*special, spontaneous, embodied reactions*' that enable us to gain access to each other's '*inner lives*'. These moments are 'poetic' in that '*they are to do with novelty, with the process of creation (Gr. poiesis = creation) with 'first time' meaning-makings and with 'first time' understandings*'. In some ways, this reflects the purpose of the psychotherapy session in which a therapist might encourage a client to make sense of themselves and their problem by talking about it, with the intention of the client re-inventing themselves in some way.

So is action learning therapeutic? Were the research conversations here a form of therapy or were they simply 'good' conversations that encouraged subjects to think about and make sense of their experience of action learning? I did not intend for them to be therapy sessions and I did not actively encourage anyone to 'bare their soul'; I listened and tried to understand; if subjects wanted to use the interview as a further layer of sensemaking then the opportunity was there.

The next chapter identifies a missing dimension to the literature review and presents the theory construction element of the thesis.

Chapter Six

Discussion

Introduction

I set out to understand the nature of action learning and to examine whether it could live up its promise of offering a new paradigm for management development (McLaughlin and Thorpe, 1993) and to also examine Willmott's (1997) proposal that critical action learning presents a useful format for developing criticality and critical reflection. The research questions also identified the nature of criticality and whether 'being critical' necessarily means engaging with a critical curriculum in the CMS sense.

Once I had analysed the interviews that I had carried out, I realised that there was a missing dimension to my literature review. This missing element became apparent to me when I analysed the way in which some of my subjects made sense of their learning in their interviews and how the process of talking out loud and hearing oneself speak was a powerful feature of critical reflection. At this point, I returned to the literature on social learning and began to connect the literature and the methodology. This section of the literature is reported here.

I then go onto explain two frameworks which represent the theory construction element of the thesis. The first provides a way of naming and exemplifying the four levels of learning which were experienced by subjects in this study. The second framework builds on the first by providing an analysis of the nature and type of reflection experienced by learners at each of those four levels.

Finally, a number of questions which have emerged as central to this inquiry are considered:

- The place of the CMS approach to critical reflection in business schools;
- The nature of radical reflexivity and the learning conditions which may provoke it;
- Social constructivist and social constructionist approaches to conceptualising learning;
- The value of action learning in management education.

Learning and the co-creation of meaning: practical authorship

The so-called 'linguistic turn' in management embraces the idea of practical authorship: an approach to conceptualising management learning which has critical reflection at its core. The epistemological basis of this approach is social constructionist and takes its lead from Gergen (1999) and Shotter (1993). Cunliffe (2002a) and Shotter and Cunliffe (2003) along with others (e.g. Pavlica, Holman and Thorpe, 1998) who seek to show how the co-creation of meaning in the management learning situation may be practically brought about. They seek, not just to interpret and explain what is happening in management learning situations, but also to influence and improve the quality of learning taking place. This body of literature has sound philosophical roots and all draw heavily on the work of Merleau-Ponty (1964), Goffman (1967), Weick (1979), Wittgenstein (1980), and Bakhtin (1986).

Shotter, (1993) acknowledges a move from the modern to the postmodern world and with it, the need to rely less on science and more on human behaviour and experience and on the language which we use to construct our world. Managers work in specific social contexts. Knowledge and knowing are embedded in these contexts rather than existing as theories to be applied at the appropriate juncture.

Normative prescriptions pay no attention to the fact that managers cannot always speak and act as they please and that they operate in a 'jointly constructed moral setting' (Shotter, 1993). The 'fuzziness' of the management environment and the way managers work and learn with others is best explained by a 'relationally-responsive' version of social constructionism (Shotter and Cunliffe, 2003). Understanding, describing and solving problems are all achieved through dialogue: Shotter and Cunliffe (2003) take this notion of dialogue one step further in their adoption of the phrase, *social poetics* to describe the co-creation of meaning in which managers are engaged. Good managers are aware of the power of language and their role in jointly constructing social reality with their colleagues. The language they use offers a sense of the situations in which they find themselves. Furthermore, through language we and they can gain insights into their ethical and moral stance on issues. Being aware of how dialogues are constructed and examining 'words-in-their-speaking' (Shotter and Cunliffe, 2003) can help managers to discover new possibilities and perhaps examine that which was previously taken for granted.

Cunliffe (2002a) encourages managers to take a critical view of their dialogical practices, acknowledging the role of tacit knowledge (Polanyi, 1967) in guiding their actions. This 'knowing-in-action' is constantly being refined by the one-off events of which our lives are made up. It leads to a capacity to be reflexive, that is, to engage in complex thinking which exposes contradictions, doubts, dilemmas and possibilities (Chia, 1996). This stands in contrast to Schön's (1983) or Kolb's (1984) simple reflection. So critical reflection (or reflexivity) is best achieved by an examination of language. Cunliffe (2002a) acknowledges her role as a management educator and as an agent of control, and from this basis, offers insights into her practice in attempting to introduce reflexive dialogical practice or the co-authoring of learning into her teaching practice. Students' written work and reflections, conversations between and stories created by teacher and learners, provide opportunities for reflexivity and the construction of 'practical theories' about how managers relate to others.

Social poetics, therefore, became for me not only a way of understanding what had happened in the interviews with subjects, but a way of conceptualising how managers work and learn together. I had been so fixed on using it as a way of analysing data that I had ignored the possibility of it also providing an explanation of how learning occurs. This collision of methodology and the conceptual framework of the learning literature was initially quite disconcerting but only in terms of how it could be presented in the form of a thesis.

There are links between practical authorship and Lave and Wenger's (1991:47) socially situated view of learning:

'Conventional explanations view learning as a process by which a learner internalizes knowledge, whether 'discovered', 'transmitted' from others or 'experienced in interaction' with others. This focus on internalization does not just leave the nature of the learner, of the world, and of their relations unexplored... It establishes a sharp dichotomy between inside and outside, suggests that knowledge is largely cerebral and takes the individual as an unproblematic process of absorbing the given as a matter of transmission and assimilation'.

Wenger (1998) develops his view of socially situated learning to include the notion of the existence of communities of practice in which individuals in organisations participate on a daily basis. These involve groups of people with a shared interest, coming together to work and solve problems, developing shared mindsets, language and tacit knowledge:

'A community of practice is different from a *business or functional unit* in that it defines itself in the doing, as members develop among themselves their own understanding of what their practice is about'. (Wenger, 1998)

The idea that individuals co-create and develop meaning as a way of critically reflecting is a common thread in 'pragmatist critical' (or small 'c') and social constructionist approaches. An Activity Theory perspective would characterise written and spoken text as 'mediating artifacts' in these situations (Engeström 1999). Here we are more concerned with the spoken word and how critical reflection happens when individuals and groups engage in 'guided talk'. In the

case of this research, this guided talk happened both in the action learning sets and in the research interviews.

Identity and self efficacy

Berger and Luckmann (1971:194) were the first to suggest that identity is formed by social processes. Lave and Wenger (1991:53), adopting a relational view of learning, claim that it involves the construction of identities simply by being a part of the system of relations which are produced by social communities. The formation of identity in this way is often linked to a growing affiliation with or attachment to a profession and the adoption of the genres (or speech acts) used by practitioners is an indication that the values, beliefs and skills required in a particular practice have been acquired (Hung and Chen, 2001). Billett and Somerville (2004:313) claim that behaviour is shaped through 'social suggestion' in the form of social norms and guidance from others and that this change in behaviour also has a cognitive outcome which they characterise as learning. However, an individual's construction of self is dependent on their personal history and the agency or energy they deploy when interacting with the knowledge encountered in the social world (pp.317-18) In proposing these ideas, Billett and Somerville (2004) assume that the reference point for identity construction is embodied within a particular profession; they provide case studies of mine workers, hairdressers, mechanics and care workers to illustrate their point. Their central tenet is that an individual's learning is founded both upon the intensity of individual agency and the intensity of the social agency (p.317). In other words, everyone will forge individual identities based on their motivation, their past experience and the way in which they engage both with the role and with other people. In creating our own identity we also help to re-create the identity of the role or profession itself. In this sense, an outcome of learning is the formation of (in loose terms) a professional identity which is socially constructed

and mutually defining.

For Giddens (1991:32-3) the self is a 'reflexive project'; a process of connecting personal and social change. Therapy and particularly autobiographical writing or speaking is used as a way of helping individuals understand themselves and to make sense of social and personal forces which impinge upon their construction of themselves. Giddens (1991:78-9) also discusses the notion of authenticity – being 'true to oneself' which entails a high degree of self knowledge and an acknowledgement of our 'inner experience'. Being authentic seems to involve being able to separate our true feelings and traits from those imposed on us by others. Postmodern theorists would disagree with Giddens' notion of 'self' as a rational, knowable entity. For them, self is illusory, and life histories are 'grand narratives' (Lyotard, 1979).

Fenwick (1998:203) discusses women's 'search for self' in the context of the workplace. The women in her study, she claims, come to know about their work self in three ways:

'By watching the self perform ... what they did well, what fitted and what did not for them, what their voices sounded like ... through the images reflected in their colleagues gaze ... (and) through their accumulated biography of work experience'.

Fenwick reports that many of her subjects referred to an 'authentic' self:

'Knowable through a delicate process of reflective meditation'. (1998:210)

A clear sense of this authentic self helped these women to make decisions about their 'fit' with a particular workplace or role and, in some cases, to challenge it in situ or to summon the courage to leave it behind.

Holman *et al.* (1997:145), in a social constructionist critique of Kolb's *Experiential Learning Theory*, suggest that the construction of managerial identity is enabled

when managers are located within their unique situation, characterised as capable of changing their social and cultural context.

So whilst identity construction may be an outcome of learning it is by no means 'once and for all' and is best viewed as a dynamic and ongoing process. However, it may be that as Fenwick (1998) illustrates, having a strong sense of self and being able to articulate this in some way is a powerful personal development tool. Perhaps it is the ability to create that identity, however ephemeral, in spoken or written words which makes sense to the person who owns them that is the 'identity outcome' of the learning process.

A positive sense of self or strong identity may encompass a high level of self-efficacy (Bandura, 1977). This refers to the level of belief which learners have in their own ability to do something. Highly efficacious people attribute failure to lack of effort whereas the inefficacious blame lack of ability. A high degree of self-efficacy allows a learner to visualise what success will look like. According to Robertson and Shadri (1993) a high degree of self-efficacy is linked to high performance and low self-efficacy produces poor performance. Self-efficacy is closely linked to the idea of self-confidence which, according to Norman and Hyland (2003:262) has cognitive, emotional (affective) and performance components. The cognitive elements include self-belief and self-knowledge; the feelings generated by confidence are happiness and an absence of fear; performance is expressed through words such as 'able', 'effective' and 'competent'. In the same study, Norman and Hyland (2003:267) found that lack of confidence made their subjects:

- Self-critical and doubtful of their own abilities;
- Anxious, nervous, tense, uncomfortable and insecure;
- Have difficulty communicating and interacting with others;
- Avoid certain tasks.

One of the conclusions drawn from their findings is that;

'Group activity and interaction has the potential to enhance confidence and achievement at all levels of learning'. (2003:269)

Co-creation of meaning and learning is also explored by Vygotsky (1978, 1986) in

his notion of the zone of proximal development. Vygotsky's interest in co-operative learning, mediated by language, showed how children can do more with assistance but only within their personal limits. According to Ryle (1999:412) his work was particularly concerned 'to determine how interpersonal activity, involving tools and/or language, became transformed into intrapersonal, mediated thought'.

The idea of the zone of proximal development fits with Engeström's (2001) notion of expansive learning in that learning is multi-dimensional. In this study, the development of shared meaning and understanding within learning sets has the effect of opening up new vistas and understandings for learners, both of the contextual setting of their business and their role within it. For most subjects, this would have been impossible to achieve alone.

For Weick (1995:23), sensemaking, identity construction and therefore self-efficacy are inextricably linked:

'The idea that sensemaking is self-referential suggests that self, rather than environment, may be the text in need of interpretation'.

Action learning exemplified

In reporting and analysing the data, I developed four modes of learning each of which encompasses a different level of reflection. The categories which have been developed here should neither be seen as mutually exclusive nor as exhaustive; they are a reflection of the lived experience of people in the project studied. There is no question that individual learners set out with any of these

purposes in mind nor that facilitators ran action learning sets in such a way as to engender or provoke certain reactions from set members.

The categories provided here should not be seen as a formula for facilitating sets or for evaluating the outcomes of action learning; it is simply a taxonomy which hopefully helps the reader to differentiate between various reactions to, and engagement with the action learning experience. Each of the categories will be discussed here with particular reference to the nature or absence of critical reflection which seemed to occur in that group of people. Figure 6 shows the various modes of learning which are described here.

Modes of Learning

Level 1	Level 2	Level 3	Level 4
Non-learning	Abstract; not 'of self'	Confidence and identity building	Finding courage
↑ <i>Little reflection, piecemeal learning, information gathering</i>	↑ <i>Focus on business and community- building rather than self</i>	↑ <i>Strong focus on self. Asking tough questions. Questioning basic assumptions</i>	↑ <i>Making life-changing decisions. Soul searching. Forging a new identity. Mould-breaking.</i>

Figure 6: Modes of Learning

Level One: Non-reflective learning

Some learners remain untouched by action learning. At best, set members in this category may pick up some snippets of information but do not take action on a particular issue which they presented to the group as their 'problem' as defined by Marsick and O'Neill (1999). The 'non-reflective' learners in this study,

exemplified by James, often did not have a particular issue to bring to the group in the first place. This meant that there was no focal point for their learning and therefore no vehicle to which they could hitch their personal development. Therefore, the cycle of working on problems, checking individual perceptions and taking action (Pedler 1996:20-2) did not materialise.

This could have happened because they were not fully briefed about the nature of action learning or because the set was run in such a way as to not ask members to specifically define and present 'problems'. However, in all the sets in which I encountered this type of learner, there were others who experienced deeper learning. It is more likely that this lack of a 'problem' was a facet of these learners not wishing to personally engage in the process; a way of keeping the discussion superficial and their level of self-disclosure low. The 'non-reflective' learners I interviewed all perceived action learning as either a problem-solving group (in the sense that there were solutions to be 'found' rather than jointly constructed) or as a networking opportunity. Their involvement in the group reflected these perceptions in that they would offer solutions to other set members or look for opportunities to promote their business. There is no reason why action learning could not fulfil these purposes but there are other forums (workshops; networking meetings) which could do so equally as well, without seeking to impose the critical edge which these learners sought to resist.

Level Two: Abstract learning

Shirley's experience shows how many learners in this study embraced the notion and practice of action learning without immersing themselves fully in the process. The detachment that Shirley, and others like her, managed to maintain was underpinned by her discomfort with becoming too personal in her deliberations about her business (in public at least). Although she admitted that the dividing lines between work and business were less defined in a small firm than in a large

corporate, Shirley resisted public self-disclosure. The focus was firmly on the business rather than on the owner-manager and a further theme of mutual support evolved from helping others to find new clients or sourcing suppliers rather than coming to terms with them, as an individual, running a business. The links that are made at level three, between the development of the owner-manager's identity and the development of the business are not evident here.

These action learners viewed their stints as set members as rewarding and interesting. There was a good degree of community-building both in terms of the set constituting itself as a community of like-minded individuals who helped each other and in recognising the particular needs of small businesses in their region or sector. Shirley's story was chosen as an example of this because she was part of a set in which members lived and worked in rural Cumbria where small businesses face different pressures to those in urban contexts.

Level Three: Learning as confidence and identity building and as reality checking.

These two categories are discussed together in this section, rather than separated as in the data reporting chapter. This is because the level of learning and the nature of critical reflection were similar although they resulted in different outcomes or served different purposes. The majority of interviewees fell into this category, with 'non-reflective learning' and 'business growth or survival' joint second in frequency and 'finding courage' being the least common.

Fenwick's (1998) contention that the ability to articulate a strong sense of self is a powerful personal development tool is certainly borne out here. A strong theme from many learners was that of identity-building although most of them certainly did not set out with that intention. The links between identity and self-efficacy (Bandura, 1977) and the ability of those learners with a strong sense of their own

identity to visualise success were also clear. For owner-managers of small firms, the manager *is* the business; their identities are inextricably linked. Sean's story illustrates this well: he did not have a clear vision of what he wanted to achieve in his business – he drifted into it post-redundancy; he was unsure about the kind of clients he was looking for or how he would find them. Action learning enabled him to assess the gaps in his skill set and to realise that the business could not progress unless he addressed them. He found it difficult to detach himself from the business in the way that Shirley could, so the growth of his business had to come from the forging of a clearer vision of what he could offer to clients, and how he could achieve it. Confidence building can come from the mutual support and encouragement that is given by the group but more powerfully from the process of the learner 'working through' their identity-building with the group. This was certainly the case with Sean who felt proud of the fact that he had recognised his shortcomings despite having to undergo a large degree of discomfort in set meetings to get there.

Learning as a reality check involves learners learning to see themselves as others might see them and as a result, changing their behaviour. These learners already have a strong sense of identity and have fairly high self confidence. Susan's account is interesting as she professed and appeared to be a very confident woman, yet she needed to 'check' her external image with others. In doing so, she developed a set of skills which she needed for her new business which delivers confidence-building seminars for women. Susan learned to listen and to think about other people's issues; something which she had not been used to doing in her senior role in a large, prestigious corporate organisation.

Another learner undergoing a reality check explained how she had learned to realise that anticipating problems which never materialised often became a problem in itself. Louise explained how the levels of stress that she felt in running a small firm often led to a distrust of others and a need to control every situation – even those which had not yet happened! As a result, her stress levels rose and

the problem inevitably grew. Louise talked about how the 'why' questions in her learning set made her see how this controlling behaviour was unhelpful for her and those around her and was stifling the growth of her business. Without action learning, Louise would have found it difficult to have taken the time to 'stand back' and analyse her actions.

Both of these women discussed their experiences of undergoing a 'reality check' as something which happened naturally during the process of action learning. They talked, in their interviews, of 'suddenly realising' the effects of their behaviour at work and at home, during a set meeting. Having been a participant at two of their 'leafy Cheshire' set meetings, I would assert that their 'sudden realisations' did not happen as a matter of course but as a result of skilled questioning and a supportive learning climate.

Level Four: Learning as finding courage

Two narrative accounts of learning as finding courage were reported during the interview process. They were both powerful testimonies of life-changing experiences in which learners realised that they needed to change a set of circumstances in the face of strong emotional reactions, both on their part and that of others. In both cases, the learners were part of long established family businesses with a strong set of traditions and expectations of family members: namely, the presence and power of a matriarch for one learner and a patriarch for the other. The nature of conflict within family businesses is well recognised (see, for example, Davis and Harveston, 2001 and Sonfield and Lussier, 2004) but is not a subject for discussion here. However, the personal struggle of these two men in which they had to take a stand against their respective relatively aged parents to change either their direction in life or the course of the business, illustrates how action learning can facilitate powerful reactions and the building of a completely new identity.

Ernest talks about being 'galvanised into action' by being able to share his issue with a group of people who had 'no axe to grind', answering questions in 'an open and honest way' and then being able to 'take the risk'. This resonates with Revans (1980) premise that action learning should encompass dragging out experience for the inspection of comrades in adversity. Ernest was able to re-define himself as a novice teacher, building experience and fulfilling a vocation rather than just another member of his mother's team, fulfilling his duty.

Although Ernest's learning experience is deeply personal, his decision to change direction in life had major implications for the business, encouraging all family members to be more honest about how they saw their role. It stands as a clear example of 'double loop' learning (Argyris and Schön 1978) and epitomises the Revans spirit of action learning.

Critical reflection

The analysis in the previous chapter used Burgoyne and Hodgson's (1983) learning levels to assess the type and level of learning. Although this was helpful in categorising the experiences of learners, it does not fully capture the nature of reflection in the learning process especially as what they describe as learning at their level two is not likely to happen here; this 'naturalistic' learning is more likely to occur in the workplace, rather than in the action learning setting which provides the space, focus and potential for critical reflection.

The modes of learning offered here represent a continuum of reflective practice with non-reflective learning at one end and 'finding courage' at the other. Figure 7 shows each mode of learning and a brief description of the type of reflection which, in this study, was observed and recounted by subjects.

Modes of Learning: types of reflection

Level 1	Level 2	Level 3	Level 4
Non-learning	Abstract; not 'of self'	Confidence and identity building Reality check	Finding courage
↑	↑	↑	↑
<i>Little or no reflection</i>	<i>Simple reflection; Boud et al. (1985); Kolb (1984); Constructivist approaches (Mezirow, 1990,1991)</i>	<i>'critical' (not 'Critical') reflection (Reynolds, 1997, 1998, 1999) 'Double loop' learning (Argyris and Schön, 1978)</i>	<i>Critical /radical reflexivity (Cunliffe, 2002a)</i>

Figure 7: Modes of Learning: types of reflection

A summary of the theory building process

The construction of theory in this thesis emerged through an iterative process of comparing data and the literature dealing with levels of learning and the nature of reflection and critical reflection.

1. Concepts

Data collected and analysed from participant observation in learning sets and from interviews initially produced five concepts (see page 92) which emerged from a grounded analysis as potentially significant:

- Non-learning
- Identity and self-efficacy
- Questioning basic assumptions

- Focus on business/self
- Community building
- Soul searching and mould-breaking

2. Themes

Five Individual learner accounts were initially categorised into themes which best described the learning experience of groups of research subjects and which also exemplified the concepts initially identified. These themes are:

1. Non reflective-learning
2. Learning as mutual support and business growth
3. Learning as confidence and identity building
4. Learning as a reality check
5. Learning as finding courage

3. Modes of learning

The data and the emergent themes were considered against Burgoyne and Hodgson's (1983) framework and Bateson's (1972) work on levels of learning. The themes had some congruence with Burgoyne and Hodgson's (1983) framework. However, when themes 3 and 4 (Learning as confidence and identity building and Learning as a reality check) were subjected to further analysis in terms of the level and type of reflection which occurred for these learners, there was little to differentiate between the two and a decision was taken to present these two themes as one mode of learning underpinned by 'critical reflection. So five *themes* which emerged from the data became four *modes of learning*, as two of the themes were recognised as representing one mode of learning after they were compared against the existing frameworks and the level of critical reflection analysed. The modes of learning (see Figure 6 on page 148) are:

- Level 1: Non-learning
- Level 2: Abstract; not 'of self'
- Level 3: Confidence and identity building
- Level 4: Finding courage

4. Modes of learning: types of reflection

The final stage of theory construction involved the identification of the relationship between each mode of learning and a particular type of reflection. The object of this exercise was to understand and explain the nature of reflection at each level of learning. This process comprised a comparison of those modes of learning identified from the data against levels of reflection recognised in the existing literature. As a result, four distinct levels of reflection were identified each associated with a particular mode of learning (see Figure 7 on page 154):

- Level1: Little or no reflection
- Level 2: Simple reflection
- Level 3: critical reflection
- Level 4: Critical reflection

The model offered as a result of this research incorporates a fourth level of learning – Critical reflection – and it is differentiated from critical reflection at level 3. It is this differentiation between critical and Critical (level 3 and level 4) learning which is offered as a contribution to knowledge in this thesis.

Reflection and critical reflection in learning

Using the model suggested here, the process of incorporating reflection into learning only begins at the second level of action learning – ‘Abstract learning’. Simple models of reflection provide the most appropriate description of these circumstances. Kolb’s (1984) model, based on the four stage cycle of concrete experience, observations and reflections, formation of abstract concepts and testing the implications of those concepts in new situations, provides a template for the learning experience which many owner-managers described to me. The reflection was often ‘simple’ in that the action which it prompted may have led to changes in their business (e.g. the creation of a new marketing strategy) but not to significant personal transformation. This rather detached and retrospective approach to sensemaking was often carried out in the company of others (i.e. in the action learning set) but could not be described as a process of jointly constructing a new reality. Pavlica *et al.*’s (1997) proposition that the experiential learning model cast learners as ‘Intellectual Robinson Crusoes’ seems to be a sound analysis of what was happening to those owner-managers operating at this level. This does not mean to say that this is an unhelpful experience for most learners and there is some evidence to suggest that certain owner-managers became more aware of the need to reflect on a regular basis as part of their working day rather than as simply part of the action learning set process. That is, the experience of action learning, even when only simple reflection occurs, may be useful in helping owner-managers become ‘reflective practitioners’ and be more aware of their ‘reflection-in-action’ (Schön, 1983) in between set meetings and after the action learning experience has ended.

The process of simple reflection may not always preclude a conscious examination of feelings. Boud *et al.* (1985) incorporate an examination of feelings into their model of reflection and propose that attending to feelings can offer new perspectives on, and changes in, behaviour. So action learning set discussions may not always centre around the need to take certain actions in order to help

the business grow (as in the marketing strategy example given previously) but may also focus on emotional responses experienced by set members to aspects of their work.

Examples of simple reflection can be found in the description offered in the previous chapter in Learning Set 2. Pete's issue about the establishment of a distribution system for washing machines involved an examination of his experience of the market and what it might need. This included observations and reflections both from himself and the rest of the group in the form of a discussion about the range of ways in which he could proceed; the formulation of possible new ideas and approaches and some testing of these both within the set discussion and in practice. Ultimately, Pete solved this problem for himself or at least preferred to believe that this was the case.

The resolution of Jayne's issue can also be categorised in this Kolbian way but this time with much more of a focus on how Jayne felt about her experiences and how her feelings were affecting her decision-making and her judgement. This analysis of her feelings, with other set members often 'reflecting back' what they were hearing rather than asking insightful questions, helped Jayne to gain a new perspective on her experience and helped her to formulate plans for future action.

We should not assume that because reflection is 'simple' that it is unhelpful; many action learning set members were wholly satisfied with their learning experience which they felt helped them to make changes in their business and solve problems by 'talking out loud'.

Reflection becomes more 'critical' (Reynolds, 1997; 1998; 1999) and learning of the 'double loop' (Argyris and Schön, 1978) variety when the learner him or herself, rather than the business issue, moves centre stage in the process.

Reynolds' (1998:189) five principles of critical reflection will be examined here. The first entails the idea of questioning basic assumptions and 'taken-for-granted's':

'The fundamental task of critical reflection is to identify, question and if necessary, change those assumptions. It is a process of making evaluations, often moral ones, and not simply exercising judgements of a practical, technical nature'.

This was evident in all the examples of learning which I have included in this category. Many respondents talked about feeling uncomfortable when being asked insightful questions that made them confront hitherto sidelined issues. This seemed to echo Thorpe's (1990) idea that action learning should include an element of 'strangeness' for learners, Revans' (1971) proposition that learning with the power to transform is derived from unfamiliarity and Cunliffe's (2002a) notion of learners' 'discomfort'. From the evidence collected for this study, it would seem that these 'taken-for-granted's' may be about the nature of the business itself (for example, asking questions such as *Is there really a market demand for a proposed new product?*) or, in most cases, about the owner-manager him or herself. In the latter case, these are often assumptions about their perception of themselves as an owner-manager, business partner, boss, spouse, parent, sibling, son or daughter and may provoke learners to use action learning to construct a realistic picture of themselves (reality checking), to create a new identity or to become more self-confident as a way of becoming more personally efficacious and of taking the business forward.

The second of Reynolds' (1998:189) principles of critical reflection is that

It has a collective focus; as an antidote to the 'overriding preoccupation with the individual and the personal in adult education'.

There is evidence from this study to suggest that learning can be conceived both as a social constructionist and a social constructivist activity and that both may occur in and through the company of others.

Susan's experience seems to exemplify Mezirow's (1990, 1991) notion of 'transformative learning'; whilst Susan, and others like her, questioned basic assumptions and engaged in a critique of their practice, the focus was very much upon themselves. Mezirow's idea of 're-framing' oneself and creating new personal constructs in the way that Kelly (1963) suggests is constructivist – that is, it is focused on the person making sense of him or herself rather than constructionist – a process of joint construction of knowledge and reality.

Kelly's (1970:17) view of experience is that it has the capacity to shift personal constructs with the proviso that:

'The amount of a man's experience is not measured by the number of events with which he collides, but by the investments he has made in his anticipations and the revisions of his constructions that have followed upon facing up to consequences'.

So personal constructs are changed not simply through the accumulation of experience but through the analysis of that experience. The idea that anticipation is a key facet of shaping behaviour is borne out by Louise's observation that she changed her behaviour patterns by learning to anticipate events in a different, less negative way. Kelly (1970) proposes that a pattern of behaviour emerges from an individual's personal construct system rather than through their social encounters.

Although the changes in thought and behaviour in this mode of 'action learning as a reality check' can be conceptualised as a process of individual introspection, there is also a collective focus to it. Susan talks about how the questions offered by the set made her think about her behaviour and attitudes but the changes she made came primarily from a *post-hoc* analysis conducted in her own mind rather than in the process of 'talking out loud' in the set. Weick's (1995:18) 'sensemaking' describes this well. He talks about sensemaking being grounded in identity construction and as an activity focussed on the individual:

'How can I know what I think until I see what I say?'

Yet, for Weick (1995:20) although there is a predominantly social focus to this activity, the sensemaking, or learning, occurs as a result of the individual's cognitive process rather than being created in the moment, by the group:

'Identities are constituted out of the process of interaction....presenting some self to others and trying to decide which self is appropriate'.

The mode of learning as 'confidence and identity building' does have much more of a collective focus and can be best understood from a social constructionist perspective, as opposed to the constructivist way in which Weick (1995) characterises it. One learner who engaged in critical reflection in order to create a new identity talked about 'witnessing myself in my own stupidity'. This idea that the process of 'hearing yourself speak' can give those words a different meaning to that which they have when they are merely unarticulated thoughts, was a strong theme for learners here. It seems that putting your thoughts into words and sharing them with the set is the first step to action – one of making sense of a situation and then jointly creating solutions in dialogue with others. Sets, working in this mode, constitute themselves as a community of practice (Lave and Wenger, 1991) which defines itself in the doing (Wenger, 1998). This also exemplifies Vygotsky's (1978, 1986) zone of proximal development, whereby individuals are stretched towards their potential through the group's interaction. Sean described his group as 'not having any rules ... there's a general feeling we're helping each other'. From the set's discussions a *modus operandi* emerges, not in any formal or published sense but through the talk and behaviour of set members.

The ability for the set to produce 'generative discourses ... that simultaneously challenge existing traditions of understanding, and offer new possibilities for action' (Gergen, 1999:49) comes from this shared sense of practice which is often difficult to explain to an outsider. However, the discourse may not always be 'generative' in the way that Gergen suggests; Shotter (1993) talks about 'a

more everyday kind of knowledge' which is a 'contextualised form of knowing which only comes into being in the course of acting within the social situation within which it is known'.

The group develops its own set of discourse and in some sets, each member identifies him or herself by their own particular slant on this discourse. Learning set 2 provides examples of this; the set constituted itself as a business-focused, action-orientated group by frequent use of 'business' terms ('strategy', 'business plan', 'marketing plan', 'return on investment') and as a team by the continued use of the first person plural, particularly by the set adviser ('we always say, don't we...'). As each set member discussed their issue, they followed this convention but also laced their dialogue with their personal discourse which for one person was about family values, another about caring for staff and another about being ruthless in achieving objectives. The retrospective analysis of these words is interesting enough in its own right but that is not the point here; in jointly constructing this social situation (the action learning set), there is much more to be learned from studying 'words-in-their-speaking' and paying attention to the '*constitutive or formative powers*' of language. (Shotter and Cunliffe, 2003:26)

Critical or critical?

Reynolds' three final principles of critical reflection will be discussed together as they represent those elements of critical reflection which are influenced by critical social theory:

Analysing power relations – 'Perhaps the most notable distinction between reflection and critical reflection'. (1998:190)

It is concerned with emancipation; 'The realization of a more just society based on fairness and democracy'. (1999:173)

'Confronting spurious claims of rationality and objectivity and revealing the sectional interests which can be concealed by them'. (1999:173)

Reynolds (1998) believes that Kolb's and Schön's theories of reflection are limited by the individualized perspective which they promote. In critically reflecting, managers become aware of a much wider environment in which they operate and begin to realise the social power relationships of the organisation and their own networks. The language that Reynolds uses to describe these phenomena ('emancipation', 'rationality', 'power relations') has its root in critical social theory and is recognisable as that which is used in Critical Management Studies. There is little evidence from this study that discussions of this nature occurred in action learning sets. This would seem to support Pedler's (1997) criticism that action learning is anti-theoretical or it may be that these theories are of little use to helping owner-managers make sense of and take action in their context. I have already made the point that theory construction is of the 'practical' variety; finding ways of helping these learners become better managers in the context in which they operate.

In analysing power relations, managers are encouraged to discover new ways of conceptualising an organisation (perhaps their own organisation) in order to create fairer societies (or organisations) leading to the emancipation of those in subjugation. The concept of dialectics is central to critical theory and would seem to form the basis of the idea of 'questioning basic assumptions' and of taking a holistic view of organisations and systems. It describes the mediating process of creating new reality and of understanding the social world in its totality rather than isolating elements for examination.

Carr's (2000a) discussion of dialectical thought and discussion points out some common misconceptions relating to dialectics: Dialectic is often portrayed as thesis-antithesis-synthesis where the synthesis is a compromise between thesis and antithesis reached in a fairly straightforward manner. Mediation takes place in and through the extremes (the thesis and the antithesis): it is not a simple give

and take along a continuum. The synthesis becomes a new working reality and may in turn become a thesis. Popular conceptions of binary oppositional thinking reduce dialectics to a level of simplicity in which there is always a clear opposite when in fact there may be many. This could be compared to the process of simple reflection. A dialectical view recognises a range of possibilities and involves an acceptance of possibility of transformation in the social order. Dialectical relationships exist between employees and organisations. Managers in particular can become engaged in a de-reification of established social patterns and the need to work through consequent strains and tensions (Carr, 2000b) The principle of negation within dialectics is important. This involves considering alternatives (however unthinkable) to established social or organisational practice. This questioning of 'taken-for-granted' is described by Jacoby (1975) as a 'dialectical self-consciousness' and resonates with the theme of critical reflection and the philosophy of action learning.

There is a significant minority of management academics who adopt a Critical Management pedagogy, encouraging undergraduate and postgraduate students of management to consider management theory and practice from a radical perspective. Critical approaches provide a theoretical basis for reflection; in a management classroom we may be able to create a 'de-reified' view of how organisations might function based on research carried out from this critical perspective. This may lead to change in organisations if students are willing to be 'radicalised' and if they have sufficient power in their organisation to change the social order (although this could well mean that they lose much of their existing power).

Whilst the application of these concepts may promote worthwhile intellectualising, there is little chance of it leading to real change either from a management classroom or from an action learning set. As Perriton (2004:130) observes, 'Critical Management Studies is more about 'studies' than changing management

practice' (p.130). Management students may accept that the level of abstraction required to learn from critical theory is a worthwhile exercise but owner-managers have much more of a focus on the practical and the doable. There is also an argument that the academic exercise of using critical theory as a tool for thinking in the classroom is just that – academic, and will not lead to the development of critically reflective practitioners.

Radical reflexivity

Cunliffe (2002a) argues that a social constructionist approach to management learning entails a move from learning as a cognitive process to a dialogical process. In this context, learning has a truly collective focus in which meaning is jointly constructed and relationships with others in text, conversations and shared experience are the focus. Cunliffe and Easterby-Smith (2004:31) differentiate between reflection and practical reflexivity thus:

'Whereas reflection encompasses learning by *reflecting on experience*, reflexive approaches embrace *learning in experience*. Reflection is generally characterized as a cognitive activity; practical reflexivity as a dialogical and relational activity. Reflection involves giving order to situations; practical reflexivity means unsettling conventional practices'.

In other words, reflection assumes an objective ontology – that there is something to reflect upon after the moment (as in Reynolds' models) and works on the assumption that there is an objective reality. Practical reflexivity assumes a subjective ontology in which there is no external reality and in which meaning is created 'in the moment'.

Radical reflexivity has already been discussed in the Methodological Reflections chapter of this thesis; I sought to capture 'poetic' moments in the interviews I carried out as a way of creating jointly constructed accounts of my subjects' experience of action learning. However, this radical reflexivity was also reported by subjects as part of the experience of action learning.

Cunliffe and Easterby-Smith (2004) argue that one person can engage in reflexive thinking - questioning assumptions and taken-for-granted in their own mind. Practical or radical reflexivity occurs when two or more people engage in this as a joint endeavour and create an open and critical dialogue. This assumes that all parties involved are able to do so and have sufficient 'ontological skills' or 'new ways of being a person' specifically in the way we relate ourselves to our surroundings rather than learning more facts and more information about what already exists. (Shotter, 2006)

There were some glimpses of radical reflexivity in level three, 'Learning as identity confidence and identity building' but in the main, this mode is best categorised as critical reflection as there was generally some 'thing' to reflect upon, even though the outcome may have been a new understanding or new course of action. Practical or radical reflexivity was most apparent in level four, 'Learning as finding courage'. Here, the two subjects needed to totally re-invent themselves; past behaviour was not a sound basis for reflection as it required more than a simple modification.

It may well be possible that someone who has been learning at the level of 'simple' reflection can go onto experience a more transformational type of reflection, if they are comfortable and willing to do this (some barriers to critical reflection may well be self-imposed especially as some learners' have a strong resistance to self-disclosure) and given the right learning conditions. From the evidence collected in this study, these learning conditions seem to be:

- An atmosphere of trust and collaboration
- Thoughtful and thought-provoking questions
- A heightened awareness of 'words in their speaking' (Shotter, 1993) and of how knowledge can be jointly constructed

- An agreement to analyse the sub-text; not taking everything at face value.
- A recognition that critical reflection can be both cathartic and overwhelming; knowing when to pause or stop.

Elements of all these learning conditions can be seen in the example of Learning Set 1. However, that does not necessarily mean that every learner in a particular set will be open to engaging in critical reflection as indeed was the case in the following example. Karen strongly resisted committing herself to action and Annette made it clear that she did not want to be questioned. Yet two other members of this set (Susan and Louise) engaged in critical reflection using action learning as a 'reality check'. This question of learner characteristics and particularly those which would pre-dispose a learner to become critically reflective is a possible area for further research.

Social constructivist and social constructionist approaches to learning

Learning, in this social context, can be explained in a constructivist or constructionist way. A constructivist approach would be adopted when an individual uses feedback to make sense of their 'issue' in their own mind; here, learning is a cognitive activity, underpinned by an objective ontology. A constructionist approach would see an individual making sense of their 'issue' with and through others 'in the moment'. Learning, in this sense, is a dialogical activity underpinned by a subjective ontology.

Revans' (1971:106) view of learning is essentially constructivist:

'Learning is not an acquisition of the new knowledge so much as a rearrangement of the old. We try, by taking repeated action, to build, out of what we already know, those successive programmes of behaviour that enable us, with increasing accuracy, to predict their outcomes'.

Whereas a wholeheartedly social constructionist approach involves the creation of new knowledge, illustrated by Cunliffe (2002b:38-9)

‘Learning can be redefined from discovering already existing objective entities, to becoming more aware of how we constitute and maintain our “realities” and identities. Knowledge incorporates a “knowing-from-within” ... rather than an externally imposed system of abstract propositions or critique’.

Both approaches emphasise the social nature of learning and offer different ways of conceptualising and explaining it. There is evidence from this study to suggest that ‘generative’ (Senge, 1993: Gergen, 1999) or ‘double loop’ (Argyris and Schön, 1978) learning can possibly occur in either scenario as a cognitive or dialogical process. It would appear that either the adoption of the more individualised approach epitomised by constructivism or the collective constructionist approach could be influenced by three factors:

1. The style of the facilitator ‘where the facilitator is overt about engendering learning as an “embodied process”’ (Cunliffe, 2002a) and creating an atmosphere of trust.
2. The predisposition to self-disclosure of group members.
3. The ‘life’ stage of group members and the nature of the problem they present to the group. Simple day-to-day issues *can* create double loop learning but do not necessarily involve an examination of the learner’s sense of self and future direction.

There is also a question of whether constructivist and constructionist models are or should be mutually exclusive. Both represent the social nature of learning; it is the intersubjectivity (or lack of it) in the sensemaking process which defines it. Learners seem to experience sensemaking both as an individual and as a collective experience.

We should perhaps view level four learning, that of an embodied, relationally-

responsive, reflexive dialogical process (Cunliffe, 2002a) as one possible outcome rather than a desired objective. Although this could be seen as an 'ultimate' level of learning, it is not appropriate for all learners and presents just one mode of learning outcome and process rather than something which should be striven for.

What can action learning offer to learners and developers?

The results of this study confirm that action learning offers a practical, business-focussed and person-centred approach to management development. Although there were some learners for whom action learning was little more than another networking opportunity, for most it offered an opportunity to reflect on business issues and in so doing, become 'reflective practitioners' (Schön, 1983). There was evidence of 'double loop' learning (Argyris and Schön, 1978) although not in all cases; some learners were happy to solve their problem and move onto the next one. For others, interviews suggested that action learning had been a cathartic experience in which they saw themselves in a different light and I would suggest that some learners had learned to:

'Engage in reflexive conversations with themselves, colleagues....and in other situations'. (Cunliffe 2002a:43)

and had become more thoughtful and conscious of their impact on others.

Many interviewees gave examples of the way in which their personal development had improved the performance of their business because they had solved a seemingly insurmountable problem or because they had become more reflexive. This seems to support the idea that the personal growth of the owner-manager is directly related to the success of the business.

For developers, action learning offers a person-centred approach which, in the right hands, can produce dramatic results. Initial evidence suggests that action

learning set facilitators should be capable of the critically reflexive practice which may be an outcome for their learners. This involves set advisers or facilitators being thoughtful about their own practice. Burgoyne (1994:36) talks about how, as management developers and educators, we encourage learners to learn about and reflect upon the models and theories which influence their practice as managers and that:

‘A central proposition of Management Learning is that the people who do management development need to apply the same principle to themselves’.

Burgoyne goes on to suggest that this reflection should be upon both the nature of management itself and assumptions or beliefs about how people learn. A critically reflexive management developer would have a heightened awareness of both and probably initiate discussions with learners and colleagues about these issues.

The role of the facilitator in the sets described in this research is seen to be key in engendering critical reflection. Paulette’s style of abrupt questioning and reflecting back words and phrases worked well with those learners she chose to use it on. Similarly, Pamela’s process orientation heightened learners’ awareness of the need for insightful questioning. However, in disregarding the potential of Annette’s ‘difference’ to contribute to the group’s learning, Paulette short-changed Annette in terms of her entitlement to learning. Furthermore, from a Critical perspective, Paulette allowed a class-based judgement to lead her to consider

that Annette was not worthy of the attention and care which other set members were afforded. A critical examination of Paulette’s facilitation skills reveals that she has not followed Burgoyne’s (1994) advice. Pamela’s deferential approach to Alan also makes her guilty of the same practice. In agreeing with Alan and accepting his sexist language and attitude, Pamela denies him the opportunity to critically reflect on his behaviour.

The 'facilitative' turn in education

McWilliam (1999) exemplifies the work of those concerned with the creation of 'learner-centred' classrooms and builds on the work of Knowles (1990) in expounding a philosophy of 'facilitative' teaching. The idea that the management development practitioner brings expertise in process management rather than content knowledge, to the learning event is based on Rogers' nondirective counselling approach (Perriton, 2007). The roots of facilitative learning lie in a tradition of therapy and getting the best out of people:

'The initiation of [the facilitation of learning] rests not upon the teaching skills of the leader; not upon scholarly knowledge of the field, not upon curricular planning, not upon the use of audiovisual aids, not upon the programmes of learning used, not upon lectures and presentations, not upon an abundance of books, though each of these might at one time or another be utilised as an important resource. No, the facilitation of significant learning rests upon certain attitudinal qualities that exist in the personal *relationship* between the facilitator and the learner (Rogers, 1990:305. Cited in Perriton, 2007)

Perriton (2007:169) is critical of the way in which management developers have moved away from the primacy of organisational outcomes towards a 'celebration of the subjectivity of the individual' and how this may lead learners to 'open themselves up', becoming vulnerable and rejecting theory as a source of objective truth. Although Perriton's (2007) critique is based on sound empirical data, it seems to cast *all* learner-centred modes of learning as disreputable and disconnected from organizational objectives. Whilst her data clearly shows an over-emphasis on how participants *feel* during the learning process rather than the skills and knowledge they are acquiring, this does not mean that all facilitated learning is conducted at such an extreme end of the spectrum. However, her work does articulate many of the concerns which most academics hold about 'soft' skills development.

This concern has a number of sources; first, the debate about the nature of management knowledge (as discussed in the literature review) and its centrality to management being taken seriously as a profession and as an academic discipline. Second, there seems to be a desire on the part of management academics to distance themselves from 'training' providers and even worse, consultants. Third, the quality assurance processes imposed on universities (RAE, QAA) place a premium on the creation of knowledge and its dissemination (measured as learning outcomes) through the teaching process. These ideas lead us back to the issues raised in the literature review and are discussed against the backdrop of this research in Chapter Seven - the final chapter.

Chapter Seven

Conclusions: management learning in business schools.

Introduction

In this final section of the thesis, I explain the nature of my contribution to knowledge. This is offered within the context of the ongoing criticisms of business schools and the discussion of the purpose of management education reported in Chapter One. In this conclusion, I return to the research questions posed in Chapter One and explain how the narrative accounts and conceptual models offered in Chapters Four, Five and Six have supplied answers to questions 1 and 2. I also discuss how the nature of question 3 changed as a result of my experience in the field. This main focus of this chapter is to answer question 4: what is the potential contribution of social constructionist approaches to learning in business schools?

These conclusions call for a small 'c' approach as opposed to a CMS-based curriculum as an approach to management education and action learning is advocated as one vehicle that could provide a pedagogical device that can create appropriate critical reflection. I also suggest Action Learning as an overarching term for a social constructionist pedagogical philosophy. Criticisms made of the 'facilitative' nature of action learning are considered and addressed through a proposal to engage learners as co-researchers thus developing 'double loop' learners through practice-focused theorising.

I also conclude that critical reflection can only be seriously considered to be significant in business school teaching and learning strategies if it is planned as an outcome of thoughtful teaching and learning, rather than seen as a largely

unplanned by-product, albeit a welcome one. Such an approach would be underpinned by a curriculum which takes account of the inductive and idiomatic nature of management work.

Although there are some contemporary accounts of good practice in this mode of teaching and learning which are referenced later in this chapter, I suggest that the publication of further exemplars may be a prerequisite of significant change and offer the framework of reflective learning developed in this study as one conceptual basis for such practice.

The Research Questions

1. How do managers in the SME sector experience a social constructionist approach (in this study, action learning has been used as the medium) to learning?
2. How can the nature of reflection and critical reflection in management learning be exemplified and conceptualised?

Chapters Four and Five offer narrative accounts of the learning experiences of subjects; these are then used to form a taxonomy of learning levels and subsequently an explanation of the features of reflection at each level in Chapter Six. Evidence is cited that social constructionist learning does bring about significant change in learners, incorporating critical reflection, double loop learning and radical reflexivity.

3. What is the place of Critical management pedagogy within a social constructionist philosophy?

This question did not form such a significant element of the thesis as I had at first

envisaged. The main reason for this was that my conceptualisation of management from the conventional technical, political and critical perspectives (Reed, 1989) with which I was familiar, moved to one that saw management based on a more practice-based theory-in-use model which was influenced heavily by my experience of attending action learning sets and interviewing subjects. Little evidence was found of the politicised discourse of CMS in my research, instead there was far more of a concern for critical pragmatism.

In this final chapter, I turn my attention to addressing the fourth research question:

4. What is the potential contribution of social constructionist approaches to learning in business schools?

Where are Business Schools going wrong?

This question is, of course, a rhetorical one and one which could be posed at a number of different levels. Some would argue that there is nothing at all wrong with business schools as they currently exist; they remain popular with a wide range of students and bring in significant revenue for universities. The assertion that something is rotten in the business school world is therefore a value judgement.

Starkey and Tempest (2005:70), citing Cheit (1985) neatly summarise the chronological development of the main criticisms levelled at business schools;

1. 'The business school was little more than a trade school
2. In transforming itself into not being a trade school, business school research has become divorced from the real concerns of business

3. Business school education and training does not have positive effects on the careers of its graduates
4. Knowledge produced by business schools is self-referential and irrelevant
5. In responding to customer needs the business school has become too market-driven and, in the process, knowledge has been dumbed down.
6. The business school has not only failed to deliver knowledge that enhances firm and national competitiveness, but has also been a major source of the wrong sorts of knowledge for management, fostering a short-term, risk-averse orientation'.

The 'wrong sort' of knowledge refers, in part, to an emphasis on quantitative, formulaic approaches to solving management problems.

Watson (1993) contends that management education should lead to three distinct outcomes:

1. 'Skills of intellectual analysis as associated with a liberal education'.
 2. 'Interpersonal skills'.
 3. 'A body of knowledge about organizations and their analysis'.
- (cited in Starkey and Tempest, 2005:74)

The debate about the type of graduates business schools should be developing is most sharply contested in the MBA arena with a particular emphasis on the lack of insightfulness, judgement and independent thought and feeling amongst MBA students and graduates. Whilst all of the criticisms of business schools listed above will potentially have an impact on business school graduates, one of the outcomes of this study is in suggesting how the adoption of a pedagogical philosophy and practice built on constructivist and constructionist approaches to management learning can bring theory and practice closer together and prevent our business schools churning out: 'critters with lopsided brains, icy hearts and shrunken souls' (Leavitt :1989:39).

In Chapter One of this thesis, I raised the question of why business school or business school-type education fails to change managers' behaviour in a profound and meaningful way despite the rise in the numbers of students they attract and the income they generate. I am concerned that we are being disingenuous in our offer to prospective students who assume that we are experts in facilitating learning. Starkey *et al.* (2004) refer to business schools as the cash cow in the university system and share Pfeffer and Fong's (2004) concerns about the purpose of business schools:

'Is the business school primarily about career and salary enhancements, factors that dictate the position of the business school in the league tables of business performance? Or is the business school to be considered a social institution, a key player in the history of the evolution of a revolutionary new idea and ideal – the profession of management?' (Starkey *et al.*, 2004:1522)

They suggest that:

'Business schools of the future will need to rediscover their roots as university departments and to become more like academic entities. The core competence of the academic department...is the disinterested search for knowledge. In this world, this will need to be knowledge that is seen to be relevant to the needs of individuals and society'. (Starkey *et al.*, 2004:1524)

They also call for research strategies which connect theory and practice and a focus on the preparation of students for managerial careers rather than simply the generation of income associated with rising through the organizational hierarchy.

The nature of the knowledge created and disseminated by business schools is discussed by Chia and Holt (2008) who crystallize the arguments thus:

'The debate brings into focus both the nature and impact of formal knowledge realized through management research and the apparent lack of practical skill, self-critical insight and awareness instilled in students of such knowledge'.

They discuss how the *art of doing* has been overshadowed by the *science of reasoning* and how learners in business schools fail to internalise social practices at the expense of memorising concepts.

Fox (1997:30) uses Lave and Wenger's (1991) critique of formal education and Quinn's (1992) terminology to explain why management education in universities does not bring about significant changes in behaviour:

1. 'Schooling does not produce practitioners of some practice. Rather it produces schooled adults, people who are able to *talk about* practice rather than belong to a community of practice (know-what without know-how)
2. Schooling effectively cuts students and teachers off from other communities of practice. It sequesters them and it can alienate learners because the link between talking about and performing a practice is not there
3. Teaching and learning in the institutions of schooling are mediated by discourse rather than by observing a skilled performance and imitating it ... Schooling necessitates the separation of abstract knowledge (know-what and know-why) from knowing in practice (know-how and care-why)(Quinn, 1992:30). This separation makes it possible to differentiate 'talking about' from 'talking within' a practice.'

This echoes Burgoyne and Hodgson's (1983) emphasis on the importance of naturalistic learning which happens, for managers, in the workplace, and often involves the development of tacit knowledge (know-how) which may reside with the individual or in his or her community of practice (Nonaka and Takeuchi, 1995).

The nature of higher education and the compartmentalisation of knowledge into subject disciplines mean that the importance of tacit knowledge in creating good practice is ignored because it falls at or between the margins of the subjects taught. This situation is exacerbated by an increasing emphasis on the importance of 'academic' knowledge in university business and management schools which means that many management teachers have never practised

management or even carried out their research alongside managers. Burgoyne's (1994) suggestion, that as a community we should reflect upon the nature of management, is only fulfilled insofar as it seems that academic journals are filled with such reflective pieces, often without an empirical basis.

Business schools feed students a diet of codified knowledge: MBA students, in particular, pay a premium to enrol at particular universities where they might be taught by 'gurus' who have published the 'best' research in a particular field of management. This creates two outcomes, first, students become purchasers of management education rather than co-learners and co-researchers and second, teachers are encouraged to create a 'research-led' curriculum which puts knowledge at the centre of the learning process rather than the learner. Although 'Mode 2 knowledge' (Gibbons *et al.*, 1994) exists, it is relatively minimal in volume, marginalised in importance and so unlikely to form a substantive element of the curriculum.

In order to create meaningful, generative (Senge, 1993) or 'expansive' (Engeström, 2001) learning in business schools, there is a need to put students back at the centre of the learning process. This could start with a discussion about the kind of managers we would like to create; this need not necessarily be a national debate; in fact some degree of heterogeneity would be a welcome change from the standardised management qualification offerings currently available. So our considerations when designing a learning programme (as opposed to a qualification course) might be about not just what managers need to *know* but how they need to *be*. Management competencies may have their place here; managers are not a discrete, clearly identifiable group; they operate at the top middle and lower levels of organisations, working on strategic, operational and people issues. However, business school teachers tend not to concentrate on the everyday concerns and problems of managers, even when adopting a so-called critical pedagogy (Parker, 2002). This study has illustrated the potential of social constructionist approaches to learning in helping managers to shape a

strong identity and to grow in self-efficacy as a consequence. This is an area of management development which is rarely considered important by business schools yet the evidence presented here (particularly in the account of Sean's learning in this study: see page 106) shows the significant role which identity development has in management learning.

The discussion of how management might be taught is addressed by Burgoyne and Jackson (1997) who argue that the field of management learning is dominated by a unitarist perspective. They describe an 'arena thesis' in which management learning is viewed from a pluralist perspective which recognises the views and needs of a range of stakeholders by engaging learners and others in dialogue. Whilst this approach could be viewed as an argument for the introduction of a critical pedagogy, it again indicates that the discussion should not be so much about how managers *are taught* but how managers *should learn*. However, whilst teachers of management remain unreflexive about the nature of learning itself, being 'thoughtful' about learning may merely mean changing the 'input' model of management education to save and make money, by either putting more students in lecture theatres or using technology as a way of minimising face-to-face contact with learners.

Management academics have been known to complain about students 'not reading for a degree' or 'not asking questions' or 'going through the motions'. The truth is that as a management academy, we are creating this phenomenon. We act as role models for unreflexive practice; we discourage students from asking questions because we teach them in a room with three hundred others. The UK government encourages managers to become qualified, which for many is simply adding more knowledge to their 'slop bucket' (Thorpe, 1990). As teachers, we are saying that we would like critically reflexive learners but we do not provide an opportunity for them to develop these skills.

Watson (1996) illustrates the problems of 'surface' (as opposed to 'deep') learning (Marton and Säljö, 1976) in higher education classrooms by reporting the outcomes of his 'ethnographic experiments'. His research exposes the complicity of students and lecturers of engaging in a travesty of learning, with one student observing:

'It's just cynical really. The lecturers know that most of us want to pass the course so they serve up undemanding stuff that neither stretches them nor challenges us. It's a sort of contract of cynicism really. The lecturers and the students are equally to blame – let's all go through the motions and everybody will be happy: 'learn this up and spew it out in the exam' Come on, we all know don't we?' (Watson, 1996:458)

Watson concludes that the students he researched had not been given any guidance on how to judge theories and models or how academic material related to practice (p.462). Without suggesting that a Critical (i.e. CMS-type) curriculum be introduced, he suggests that:

'It is only by offering challenges to course members, in which social science material itself is treated critically as the activities to which it is applied, that management education can really become useful and relevant to them'. (Watson, 1996:463)

Watson (1996, 2001), instead of advocating a Critical curriculum which, it could be argued, serves as a counterpoint to the managerialist agenda of the 'standard' curriculum, advocates a different way of engaging with the curriculum. Watson's approach encourages managers to question the small 'c's of managerial life by asking questions about the value of theory to practice rather than dealing with the big 'C's of power, emancipation and hegemony. In applying this questioning approach to the nature of managerial work, starting with questions such as, 'how do you go about getting people at work to do things you want them to do?' (Watson, 1996:459) and then examining how models and concepts can help or hinder the search for answers, theory becomes an enabling rather than guiding mechanism in management learning.

The emphasis on the pragmatic 'small c's' encourages theory construction of the practical variety and builds on Reynolds' (1998) first two principles of critical reflection. This approach is based on questioning norms enshrined in the technical (Reed, 1989) conceptualisation of management. A social constructionist pedagogy embracing an examination of the lived experience of managers casts students as co-researchers and teachers as co-learners. It seems logical that this pedagogical approach should go hand-in-hand with a more practice-based management research agenda.

The contribution of action learning

The foregoing discussion of the 'missing link' of critical reflection and questioning in business school pedagogy brings us back to Willmott's (1994) call for action learning as a suitable vehicle for criticality (although Willmott was more concerned with Criticality). Therefore, is action learning the answer?

Pedler's (1996) framework of what action learning should entail suggests that learners should:

- 'Work on and through *hitherto intractable problems* of managing and organising.
- Work on problems which personally engage the set members – situations in which 'I am part of the problem and the problem is part of me'
- Check individual perceptions of the problem, to clarify and to render it more manageable, and to create and explore alternatives for action
- Take action in the light of new insight ... the effects of the action is brought back to the set for further shared reflection and understanding
- Provide the balance of support and challenge ... which will enable each member to act and learn effectively

- Be aware of group processes and develop effective teamwork. Usually sets will have an adviser or facilitator whose role is to help members identify and acquire skills of action and learning
- Focus on learning at three levels:
 - About the problem which is being tackled
 - About what is being learned about oneself; and
 - About the processes of learning itself, i.e. 'learning to learn'. (Pedler 1996: 20-2)

In this study, level four learning, 'Finding courage', fulfils all of the criteria. In the context of developing owner-managers of small businesses, it is likely to have a significant impact on the business in that it will facilitate the owner-manager in introducing and managing positive change. For those learners who are building identity and confidence or are undergoing a 'reality check' (level three) then the process is also relevant and useful although the 'double loop' element may not be so obvious. 'Abstract learning' (level two) has much more of a focus on the problem and less on the person so the impact on personal change and the long-term effect on the business may be lessened; this is much more day-to-day problem solving than paradigm-shifting. 'Non-reflective learning' (level one) probably should not be described as learning at all as there is little personal engagement with problems, few new insights into practice and little action taken as a result. So it would seem that action learning is capable of facilitating learning at all levels and should therefore be worthy of consideration as a pedagogical device in business schools.

At this point, it may be helpful to reflect on Pedler's (1997:250) criticisms of action learning:

1. Despite its basis in questioning, action learning has become increasingly incorporated into unquestioned management agendas'.

In other words, questioning can lack the insightfulness enshrined in the philosophy of action learning if the diluted form of 'active learning' is adopted.

2. 'Action learning is atheoretical or 'anti-theory'. (p.251)

Very few action learning sets in this study were 'theory-driven' presumably as this would seem to be anomalous with the 'action centred' label which draws many learners to it in the first place. However, the sets in this study, whilst not using theory *per se*, were engaged in the joint construction of 'practical theories' (Rae, 2004) which became the basis for subsequent action thus reflecting the reality that managers operate in a 'jointly constructed moral setting' (Shotter, 1993) both in their work context and in an action learning set.

3. 'Action learning is too centred on the individual as agent; as actor and learner'. (p251)

This criticism is based on the premise that managers solve problems together in organisations; action learning places great emphasis on learning in the company of others. However, as this study has shown, it can engender both constructivist *and* constructionist approaches to learning.

4. 'Action learning sets can degenerate into support groups for individuals'. (p251)

There is some justification for this criticism; in this study, some action learning sets had periods within the meeting during which members did not challenge each other, merely endorsing each others' views and thus not creating change. Skilled facilitation is therefore essential.

McLaughlin and Thorpe (1993:20) suggest that action learning can be viewed in three ways:

1. 'As a toolbox of techniques, whereby learners solve problems using colleagues as a resource to test out ideas and strategies and gain feedback'.
2. 'Action learning as therapy ... the process of addressing a work problem with the critical support of 'comrades in adversity' will engender a social, emotional and intellectual transformation'.
3. 'Action learning as philosophy ... a set of beliefs which provide those who subscribe to them with a distinct world view'

Learning experiences categorised in this study at level four, Finding courage, encompass a person becoming more aware of their conceptions of the world (including themselves) and of how these might be changed. This characterisation of learning fits well with the calls to engender learning in business schools which promotes reflexivity and know-how, rather than privileging scientific reasoning and the acquisition of random pieces of knowledge. However, action learning is capable of engendering critical reflection at a number of levels and radical reflexivity should not be seen as the only satisfactory outcome. Results from this research suggest that radical reflexivity is only likely to be experienced by a small number of learners; other forms of reflection and critical reflection are just as likely to bring about change in a manager's practice without the need for the soul-searching which is a feature of the level four learning experience of subjects in this study.

From the work of McLaughlin and Thorpe (1993) and Willmott (1994) we know that action learning offers a new paradigm in management education in that it recognises that 'organisation development and self-development are symbiotic' (McLaughlin and Thorpe, 1993:22). This study has sought to further explain what happens during the social learning process in terms of the cognitive and dialogic learning which it is capable of facilitating. I have also sought to explain and exemplify what happens in the various 'modes' of social learning with a view to showing the potential of using social learning in management development to change individuals and organisations at a number of levels. It builds on the work of McLaughlin and Thorpe carried out in the early nineties by examining the nature of reflection in action learning, using the work of Kolb (1984), Boud *et al.* (1985), Mezirow, (1990,1991) and Reynolds (1997, 1998, 1999). The result is a model of social learning, describing various 'modes' and the nature of reflection in each of those modes. No one mode is 'better' or more desirable than another; in this work, they are examined and explained, rather than recommended. The study shows the potential versatility of action learning and builds on the promise it

has long offered, by showing how it can appeal to and work for, a wide range of learners and developers.

Debates about the nature and value of action learning raged in the late 1980s and 1990s when there was a growing awareness of the need to define and improve approaches to management pedagogy, prompted by Constable and McCormick, (1987) and Handy (1987). Since then, action learning has been associated either with Critical management pedagogy or with a person-centred, highly facilitative experience, rather than being considered a mainstream approach to management learning in higher education. This thesis has suggested the value of action learning in engendering personal change when the method is not underpinned by a curriculum. This lack of a curriculum focus must be part of the reason why action learning is not a mainstream teaching method in business schools; it is academics' relationship with knowledge and particularly the elevation of explicit or 'scientific' knowledge that defines what is taught and how it is taught. Calls to 'link research and teaching' mostly mean that lecturers deliver modules which are 'about' their research rather than taking a research-led approach to teaching which could involve using a social constructionist approach to creating 'new' knowledge by critiquing existing theory.

The relationship between knowledge, learning and practice

The thought of introducing a wholly action learning-based pedagogy either in the purist Revans sense or in the CMS mode, into business schools would probably leave many academics cold. There may, however, be some merit in searching for a happy medium between, on the one hand, an overly-facilitative style that rejects knowledge acquisition in its most formal sense and on the other, the currently dominant expert-centred approach which often precludes learners from internalising the knowledge on offer. There clearly must be a place for knowledge in the management curriculum and a university classroom is probably not the

best place for learners to 'bare their soul'. However, it may be that the lack of opportunity for critical reflection generated by social interaction with fellow learners and teachers is missing in the management curriculum. The result is that graduates of business and management schools are often extremely knowledgeable about the theory and even the practice of management, yet in no way could be judged as competent managers or as having those metacognitive skills which effective managers deploy.

One answer to this problem may be to compel students to engage more closely with the profession they intend to enter and develop a model of vocational training which many of the medical and allied professions practice, without losing their curriculum-based focus. In this way, social learning is mainly, but not wholly, fulfilled by students becoming apprentices or engaging in 'legitimate peripheral participation' in a particular community of practice (Lave and Wenger, 1991). This would require a significant investment and a significant change of culture both in the management academy and the wider managerial population but could ultimately lead to universities becoming legitimate training grounds for managers.

An alternative and less radical approach would involve building on the findings and conclusions from this thesis and seeking to integrate critical reflection into the pedagogical approach of business and management educators. Whilst this would not give students first hand exposure to the world of management, it could develop them as 'double loop' learners, capable of questioning their own and others' knowledge and practice. Facilitated learning does not necessarily mean that learners have to engage in frightening levels of self-disclosure rather that they question 'taken-for-granted' and explore how explicit, tacit and co-created knowledge can lead to action and more effective individual and organizational practice. This might be achieved by using action learning techniques of real problem-solving as a way of engaging with management theory. This builds on Watson's (1996) idea of practice-focused theorising by introducing action learning as the pedagogical tool capable of developing critical inquiry and reflexive

practice in our learners. The key seems to be in interrogating the curriculum rather than slavishly adhering to it. In short, I suggest a pedagogical philosophy which is based on the premise that adult learning happens through action, reflection and participation with others. However, it can be concluded that action learning, in the purists' form, is not the only medium through which this might occur.

There are a number of ways in which a model of action, reflection and participation may be enacted. I propose action learning as a term for those learning interventions which set out to change individual and organisational behaviour by generating critical reflection or reflexivity. Action learning and critical reflection become almost synonymous and encompass a number of teaching and learning methods rather than following a strict 'Revansesque' approach or a CMS curriculum. The formal adoption of action learning as a term which covers a range of teaching and learning approaches would reflect many people's current understanding of the term. Viewing action learning as a pedagogical philosophy rather than as a pedagogical device could also lead to the development of new social constructionist techniques. Action learning should not be seen as an expertise only acquired by the few but as an inclusive and dynamic approach to teaching and learning.

There are currently a range of methods which could come under this broad heading of action learning. For example, Gold and Holman (2001), Gold *et al.* (2002) and Gray (2008), suggest storytelling and argument analysis as devices for engendering critical reflection in the management classroom. Argyris (2004) suggests his left-hand/right-hand case method and a series of role plays based on specific scenarios as methods which facilitate double loop learning. Gray (2008), specifically looking at critical reflection, also offers reflexive conversations, reflective metaphors and journals, reflection on critical incidents, repertory grids and concept mapping as tools for management learning.

It may be that there is more critical reflection going on in business schools than we realise, either because we fail to recognise it and name it, or because it happens in an unplanned or random way. An example of this has been recently published by Hay and Hodgkinson (2008) who seek to counter the criticisms of the MBA, particularly the idea that the MBA 'speaks inadequately to practice'. Their research focuses on part-time MBA alumni from a 'Top 15 Business School' and reports overwhelmingly positive feedback with learners describing an 'opening of eyes' (p.29) 'an enhanced sense of self' (p.30), 'profound personal transformation (p.30) and 'a broadening and challenging of their understandings of practice' (p.32) brought about by 'the centrality of learning about the self and...a process of self-reflexivity which provides a space for critical management learning' (p.32). The vehicles for these learning experiences are reported to be an international consultancy project and 'the sharing of experiences with other managers on the programme' (p.34). This suggests an action learning experience but there is no account of how a forum or a medium for questioning was created as part of the programme design. Furthermore, it seems that the authors only discovered the extent of their students' critical thinking after the event, that is when they decide to carry out research with alumni, rather than deliberately setting out to engender critical reflection. It should also be noted that these were part-time students engaged in current practice; few distinctions between the needs of full-time and part-time management students seem to be made in the literature and this could possibly open up an area for future research.

The future of the business school curriculum?

Why then should we assume that managers who learn management at university are different from those who learn it 'on the tools' and why do we try to completely divorce these two processes? I suggest that it is because business school teachers are too remote from management practice and generally indifferent to theories of learning and the learning experience. Arguably, there are few rewards

in many business schools for being a thoughtful teacher or for spending meaningful time working with organisations solving real problems, unless it leads to 'world class' publications.

If our aim is to create managers who are critically reflexive practitioners through the use of action learning, why do we need to send them to business school at all? Would they not be more likely to benefit from working in an action learning set with a skilled facilitator? If this were the case, there would be no need for business schools at all. This is clearly not an option, given the fact that the remainder of the university system has to be financed in some way. From a less ironic perspective, there must be some value in the creation and dissemination of management knowledge. In order for management to be constituted as a profession, there needs to be a body of knowledge on which practice is based, just as there is in medicine, engineering and law. The key question here is in the manner of how learners engage with this curriculum. At the moment, most business schools offer students a set of 'givens', very much in the way that medical students learn anatomy, although CMS does offer students a different approach akin to learning about anatomy from the view of the patient rather than of the doctor.

However, the main difference between the management and the medical curriculum is that management knowledge is probably far more contestable than medical knowledge. Moreover, management practice is highly contextualised and imbued with subtleties which are derived from the manager him or herself and their organisation. The main similarity between doctors and managers is that both rely on instinct and need to be able to 'read' situations; however, the process of resolving medical issues is deductive and to some extent, formulaic. Managers, on the other hand often seem to use an inductive approach to their practice, using idioms rather than axioms.

‘Soft’ skills and ‘hard’ knowledge

Inevitably, the discussion returns to the nature of management knowledge and the purpose of management education. Personal experience suggests that some academic colleagues view techniques such as action learning with derision because an assumption is made that they deal with personal and ‘soft skills’ development and have no place in a business school curriculum which should be founded on ‘hard’ knowledge. This is underpinned by the idea that education entails applying some form of ‘treatment’ to a learner or supplying them with knowledge rather than engaging in the co-creation of knowledge. This attitude leads us to ignore the possibilities of social constructionist approaches which can be used to question the nature of management theory and practice.

Cunliffe (2008b:128) suggests that social construction is conceptualised at a macro-level by critical theorists examining how ‘power-infused discursive practices’ become embodied in social structures whereas ‘relational social constructionists focus on the micro-level’; that is, how people create meaning through dialogue. There is room for both macro and micro-level approaches in the business school although I am not convinced of the need for the existence of a Critical curriculum as the vehicle for questioning normative approaches to management. Students need to be given an opportunity to interrogate the curriculum rather than blithely accepting it. However, this questioning can come from their own practice and experience rather than applying a CMS approach, which has its own reified and privileged discourse. Business school graduates should ‘know’ about management theories; they should be able to question them and critique them and in so doing, forge their own identity as a manager. Such an approach casts learners as co-researchers and as equal to academics in the learning process; an egalitarian notion that would, in theory, please many Critical academics. This practice-focused theorising is not a ‘soft skill’ but a crucial element of management development and can only be achieved by harnessing the power of talk and particularly of ‘hearing yourself speak’.

Where now?

In this thesis I have examined the nature of simple reflection, critical reflection and radical reflexivity in social learning. I have offered a model of four modes of learning each of which incorporates a particular level or type of reflection. I have suggested that business schools need to develop and adopt a more idiomatic rather than axiomatic approach to management education: social constructionism is proposed as a philosophy which embraces a wide and hopefully growing, range of learning interventions which produce critical reflection. The evidence presented in this study shows that simple reflection, critical reflection and critical reflexivity may all be generated by action learning. Examples of practice from a limited literature show that this is just one of a range of possible pedagogical devices that could be described as social constructionist. The possibilities offered by the more widespread use of action learning and its derivatives and cousins are exciting and worthy of further investigation yet there are few empirical accounts of social constructionism in the management classroom. If there are no practical accounts of how social learning techniques can be applied, then we are unlikely to see much change. There is also a need for the debate about management pedagogy to become more mainstream in order for it to be taken seriously and to have an effect on practice.

Further research would therefore entail the production of empirical accounts of social constructionist techniques in the management classroom; an action research approach could be particularly helpful in creating new forms of practice that do not rely on 'a priori' judgements about the nature of Critical or critical management education. The framework of reflective learning developed in this study is offered as one conceptual basis for such practice. We also need, as a management academy, to take seriously our responsibility to develop skilled, knowledgeable and insightful managers and to make business schools truly social institutions.

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