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Pushing Action Research Toward Reflexive Practice

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Abstract

Managers today increasingly find themselves facing unexpected problems, needing to learn how to cope with complex environments and to take action in an often chaotic flow of events. This article discusses how researchers can engage managers in a form of dialogical action research, capable of nurturing knowledge and change. This is achieved by creating space for collaborative dialogue between managers and researchers, and supplementing it with the integration of a reflexive writing practice. We first present methodological reflections related to the challenges of sustaining management practice through action research. Second, we explicate dialogical action research and illustrate the reflexive writing practice through two vignettes which provide opportunities to reflexively explore “how things work” in managers’ organizational contexts. This forms the basis for sustaining participation and learning at individual and collective levels. Finally, we identify and discuss the specific conditions and limits of such an approach.

Keywords

management education, organizational learning, qualitative research

Introduction

Managers today find themselves increasingly facing unexpected problems, needing to adapt to complex and multifaceted environments, and to take action in an often chaotic flow of events. The extent to which academic research is useful in helping them understand and act in such complex and uncertain situations is questionable (Markides, 2011; Schiele & Krummacker, 2011; Starkey & Madan, 2001; van Marrewijk, Veenswijk, & Clegg, 2010; Vermeulen, 2007).

As Marcos and Denyer (2012) acknowledge, to bridge the different worlds of the researcher and practitioner, *knowing* and *practicing* need to unfold in a space of collaborative dialogue. Yet there is often a communication gap between practitioners and academics that makes knowledge integration challenging, and therefore “specifying the conditions under which management research inspires practice and practice inspires researchers is important” (Kieser & Leiner, 2012, p. 24). We address this challenge, arguing that by engaging in “an intense (and perhaps endless) ‘conversation’ between research actors and research subjects” (Nowotny, Scott, & Gibbons, 2001, p. 187), researchers and practitioners may explore *how things work* in an organization; discover underlying values, interests, and conflicts that are not immediately understandable or are taken for granted; and finally reframe what is already known to produce something new.

Several scholars have proposed *action research* as a fruitful methodology for narrowing this divide (Marshall, 2011;

Reason & Bradbury, 2001; Shani, Mohrman, Pasmore, Stymne, & Adler, 2008; Sykes & Treleaven, 2009) because it offers a collaborative way for academics and practitioners to address “issues of concern to individuals and communities in the everyday conduct of their lives” (Reason, 2006, p. 191). Even so, few articles discuss in any depth how researchers and practitioners can engage in a dialogue capable of nurturing knowledge of relevance to practice and of facilitating change. Many action researchers still seem to generate theories that practitioners are expected to apply, that is, the fundamental principle underlying the process is one of knowledge transfer rather than collaborative knowledge engagement.

Our aim is to address the issue of constructing relevant knowing and learning by integrating theory and practice through what we call *reflexive dialogical action research*. To do so, we build on Marcos and Denyer’s (2012) idea of creating space for collaborative dialogue, and supplement it with the integration of a reflexive writing practice that can be used to create *generative moments* (Shotter, 2010) for learning within an action research setting. Reflexive writing practice

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also offers a way of engaging managers as *co-researchers* in creating meaning and generating change.

We will first present reflections related to the challenges of sustaining management practice through action research. Second, we explicate reflexive dialogical action research and present and illustrate the reflexive writing practice through two vignettes. Finally, the specific conditions, potentialities, and limits of such an approach are identified.

The Action Research Approach

Action research is situated within a range of collaborative research approaches with the common characteristics of producing practical relevant knowledge around a situation or problem, a sensitivity to context (Reason & Bradbury, 2008), and the co-construction of knowledge and new possibilities for action through shared cycles of meaning-making and understanding (Cassell & Johnson, 2006). Dialogue is often seen as a key ingredient of this process (Bartunek, 2004; Bate & Robert, 2007; Maclean & Macintosh, 2002).

A review of the action research literature indicates that either narrative, discursive, or ethnographic methods are seen as fruitful ways of generating knowledge. From a *narrative* perspective, practitioners' stories and texts are seen as central to meaning-making and re-interpreting the relationship among actors, events and *contexts* (Boje, 2001; Czarniawska, 2007; Gabriel, 2000; Watson, 2009). Carlsen, Rudningen, and Mortensen (2014) for instance propose to cards as a textual artifact to co-produce useful knowledge within an action research project.

Similarly, from a *discourse perspective*, the focus is on working with organizational discourses and language to facilitate new landscapes and possibilities for meaning-making and change. Alternative and even contradictory discourses are surfaced and put in play (Cassell & Johnson, 2006; Sykes & Treleaven, 2009), because such a *heteroglossia* (Bakhtin, 1986) may be used as a strategic opportunity to question hegemonic and limiting discourses and to promote change. In this regard, Shotter (2010) suggests that researchers and practitioners adopt a *poetic attitude* to question their discourses and talk, and provides some suggestions for helping practitioners to use *bridge words back to their everyday use*, to call to mind the interrelationship between their use of words and the concrete everyday situations from which such words emerge and take on meaning. Another possibility relates to using real stories, vignettes, or images to suggest new ways of talking that not only orient managers and researchers toward unnoticed meanings or details, but can also provide new connections and relations with other meanings or discourses. Asking the right questions, arresting opportunistically the flow of talk, and providing metaphors and new poetics for describing each other's organizational landscapes are therefore seen as meaningful co-produced research strategies for sustaining change.

Other contributions based on *ethnographic* methods discuss the opportunity to draw attention to the cultural context in which action research is carried out (Bath, 2009; Sykes & Treleaven, 2009). Many different forms of ethnographically oriented action research are proposed. van Marrewijk et al. (2010), for instance, advocate the so-called *ethnoventionist approach* where researchers seek to *make the mundane matter*: "unlike anthropologists or ethnomethodologists they seek to act with the 'natives' or 'ordinary members' to make changes in their states of affairs—not merely record them as such" (p. 218). Sykes and Treleaven (2009) more explicitly discuss how first-, second-, and third-person action research could fruitfully work within an ethnographic approach. A first-person orientation appears as a kind of *insider* research, where the researcher-practitioner fosters inquiry into his or her life or professional practice through auto-ethnographic accounts, diaries, or notes from the field. In doing so, he or she becomes able to reflect and question his or her own practice. Second-person action research involves a community of inquiry—of researchers and organizational practitioners—who together set the research agenda, collect and interpret ethnographic data, and reflect around a given topic to discover new actions or new directions for change at a group or organizational level (e.g., Burns, Hyde, Killeth, Poland, & Gray, 2014). Finally, at a third-person level, action researchers are committed to the inclusion and dissemination of the ethnographic knowledge constructed from the co-researchers' reflections to foster new and broader orientations to learning and change.

All these contributions therefore postulate that when involved in action research, both researchers and practitioners should find ways of engaging in a dialogue that emphasizes the dynamic, multifaceted, and multi-vocal nature either of their *stories*, *discourses*, or of their *culturally informed practices*. Similarly, central to all these approaches is that organizational problems are *co-owned* by researchers and practitioners, and that narrative, discursive, or ethnographic data could sustain a *joint research and reflection* on alternative views and change strategies (e.g., Markides, 2011; Schiele & Krummaker, 2011).

Yet despite it is being well acknowledged that action research should be intrinsically participative and reflective, most contributions still seem to propose theories or techniques for solving practical problems that practitioners can then apply. Only a few authors move beyond this to propose the need to question what is taken for granted in organizational policies and practices and manager's decisions and actions, as a means of generating new and alternative possibilities for action (Cunliffe, 2001, 2014; Cunliffe & Easterby-Smith, 2004). Few describe in detail (Shotter, 2010, is an exception) how relevant knowledge and new practices—to both researchers and practitioners—can be dialogically generated in collaborative ways. This is a crucial point in bridging the researcher-practitioner and theory-practice gap, and

is central to our argument for a move toward a more reflexive form of action research. It also allows for learning *within practice* and for a greater self-awareness and understanding of the role that we as researchers and managers play in shaping organizational “realities” and knowledge. Moving from a reflective to a reflexive-oriented action research also provides opportunities for self- and organizational development. We will address how this may occur in the following section.

Toward Reflexive Dialogical Action Research

We refer to the concept of *reflexivity* as questioning what is taken for granted in one’s own—and other’s—beliefs and actions, examining how those beliefs and actions are influenced by and shape social and organizational identities and realities, and as a socially, situated, political, and collective process in which we need to recognize the situatedness of knowledge and practice (Cunliffe, 2014; Hibbert, Silience, Diefenbach, & Cunliffe, 2014; Cunliffe, 2002). Ontologically, reflexivity is situated within social constructionism, which is based on the assumption that our social world does not exist independently from us, but is shaped in our interactions, which are dialectically influenced by our sense of what that social reality might be. *Reflexivity* acknowledges that we shape and make meaning about our world from within, while *reflection* is about taking ourselves outside of a social world that is external to us to analyze it from an objective stance.

Action research is therefore *self-reflexive* when participants question their own taken-for-granted assumptions and actions, and *critically reflexive* when participants question the taken-for-granted underlying logics and values that shape the discourses and the practices in use in a specific organization or professional community (Cassell & Johnson, 2006; Cunliffe, 2010). It is *dialogic* and reflexive (Shotter, 2010) when multiple voices and sources of knowledge are incorporated into the inquiry process and different logics of action, and different professional or organizational cultures and visions meet each other. Far from being harmonious encounters, these processes require the recognition of differences as sources of creativity and actionable knowledge (Hong & Fiona, 2009; Kakavelakis & Edwards, 2012; Macpherson & Clark, 2009).

We suggest that action research needs to go beyond reflection to reflexivity, an ontologically different positioning in which participant-researchers and researcher-participants are not just reflecting *on* issues from an objective distant stance, but recognizing reflexively their role as *embedded in* the flow of events and in constituting social and organizational *realities* in ways that they may be unaware of. That is, participants and researchers *author* their practices, identities, and organizational “realities” in their everyday interactions (Cunliffe, 2014; Shotter, 1993). In taking a more reflexive

stance, participants are encouraged to interrogate and recognize their responsibilities by becoming more aware of how their assumptions, beliefs, and actions shape “realities” and create possibilities for *moving on* in the situations they face. This may be achieved by an approach to action research Shotter (2010) calls *situated dialogic action research*, which means working from within the practice to notice what might be going on—and in doing so being sensitive to our place in relation to others. We argue that one way of achieving this is by incorporating reflexivity in a deliberate way—through a reflexive dialogic approach to action research. *But what dialogical practices help sustain these participative and reflexive processes?*

Methods and Settings for Reflexive Dialogic Action Research

Within narrative and discursive approaches to action research, most of the settings and tools proposed refer to conversational and face-to-face techniques: narrative interviews, critical incident techniques, dialogic encounters, group discussions (Gabriel & Connell, 2010; Rhodes, Pullen, & Clegg, 2010), and video diaries (Mason, 2012).

Other contributions, mostly coming from the ethnographic tradition, focus on the power of written accounts (Ellis, 2004; Gabriel, 2000). Practitioners’ writings are at the center of a wide debate regarding their potentialities for exploring the ways in which professional practices and organizational discourses are constituted and connected (Scaratti, Gorli, & Ripamonti, 2009). The auto-ethnographic approach is used often within first-person action research projects (Sykes & Treleaven, 2009), as an autobiographical genre of research that displays multiple layers of consciousness, connecting the personal to the cultural. Structured or unstructured journals, personal diaries, and at-home ethnographies (Alvesson, 2009) are other techniques that can be used for sustaining practitioners’ effort in co-researching within reflexive first-, second-, or third-person action research settings (Czarniawska, 2007). In this tradition, the process of writing is emphasized as a form of discovery, which enables the inquirer to learn more about themselves and his or her relationship with the research topic (Richardson & St. Pierre, 2005).

Although written accounts therefore seem a fruitful means of facilitating practitioners’ participation in action research settings as co-researchers, actively involved in the process of data gathering, reflexive confrontation, and change, some criticalities can be found. The sole use of individual accounts appears sometimes to be too narcissistic and self-indulgent, ignoring the need for a sensitivity to context and surroundings (Silverman, 2007). To address this, suggestions have been made for more collectively made and collectively interpreted texts through critical incident accounts, journals, and field notes, written and analyzed by practitioners together

Table 1. The Writing Grid.

Critical event—Individual	On-the-spot comments—Individual	Group comments
Describe a situation or event in your daily practice that has required all your energy and thinking	Describe your emotional response to the situation	Describe key aspects emerging within the group discussion: ideas, comments, feedback, interpretations, and considerations
Describe the details of what happened: the actors involved, the organizational and contextual features and characteristics that you consider may be useful in explaining what happened and why	Describe your thoughts and interpretations of the event: how might these help explain what happened?	Record any new solutions, alternative visions, new agreements achieved by the group

with researchers, and also by small teams and communities of inquiry (Bate & Robert, 2007; Ellis, 2004; Gabriel & Connell, 2010). Here, accounts are gathered and interpreted collaboratively and understood in relation to the *whole* of a professional community or organization. Such texts can highlight both convergent and divergent meaning-making systems by emphasizing the relationship between individual views, and organizational and professional myths of a certain experience (Rhodes et al., 2010). The possibility of discussing and collectively interpreting meanings, values, and logics underpinning such collective texts can more directly lead to a second- and third-person action research approach, where the embedded relationship between individual practitioners and their professional or organizational context represents the main focus of reflection and change.

Although collective forms of meaning-making can help avoid narcissism, they may lead to the risk of missing individual voices and perspectives as culturally shared and more socially legitimated discourses and meanings take the foreground. The less practitioners find room to speak with their own unique voice, the less they will identify and learn from the process of co-researching. It is important therefore to recognize the heteroglossic and many-voiced nature of conversations.

To address these issues, we have developed a reflexive dialogical practice that integrates the advantages of individual and collective writing and narrative, discursive and ethnographic approaches to action research. In doing so, we have been inspired by Argyris, Putnam, and McLain Smith's (1985) "two-column format," a narrative and reflective practice developed within the action science field, as well as by Gobo's (2008) ethnographic grid that orients ethnographic and auto-ethnographic observations. We built on these traditions for moving to a more openly reflexive and dialogical approach. The result is a practice that is partly constituted by a practitioner's first-person written account around his or her professional experience (as in Argyris' and Gobo's examples), and partly organized as a joint and collective text, generated by the researchers' and practitioners' community of inquiry. We find this solution suitable for sustaining a wider exploration of socially and culturally made meanings informing professional and organizational life. It can also help

integrate first-, second-, and third-person approaches to action research.

The reflexive written account is organized through a semi-structured grid with three main thematic sections, edited by practitioners either individually or collectively (see Table 1).

The first section (Critical event column) asks practitioners to describe individually a key situation or event in their daily practice. This first column is a description of *fresh events*, recently happened and narrated as freely as possible, without any analysis or evaluation. This account of the event may later be useful in explaining what happened and why.

The second section (On-the-spot comments column) asks individual practitioners to express how their emotional state might be influenced by the situation, together with some first interpretations and thoughts on the event. This aims to develop reflection around the possibility of making explicit reference to how emotions and assumptions might play into the situation.

The third section (Group comments column) provides a specific space to be written only after discussing the critical event within a community of inquiry. Here practitioners share and discuss one another's writings and discuss the issues. In this discussion, the researcher triggers open dialogue and alternative interpretations to surface different voices and perspectives and to question what may be taken for granted. Whereas the first two sections are often *reflective*, the third section is openly *reflexive* and the researchers act as a catalyst in helping practitioners question their (and their own) taken-for-granted assumptions and actions as a means of generating new and alternative interpretations and responses to common problems.

At this stage, the quality of dialogue and relationships is important: the need to be open and responsive to differences, be attuned to the complexities of the situation, and to respect others (Cunliffe & Eriksen, 2011). This third section therefore represents the common legacy of the group's reflexive process and offers room to write and develop new organizational discourses and agreements as they are generated in the dialogue and discussion. In our view, this writing practice helps move participants from reflection to reflexivity through

dialogical engagement. It presents several advantages. First, it provides a space in which practitioners become active co-authors in the action research process. They are, in effect, not only encouraged to account for their experience (first column), but also have an active role as reflexive practitioners and co-researchers in Stages 2 and 3 (second and third columns) when encouraged to make explicit, discuss, sometimes contest, and review the meanings, values, and assumptions orienting their professional talk and action. Second, this practice integrates first-, second-, and third-person action research by providing information to support individual reflexivity around each participant's practices and position, and collective reflexivity around the practices characterizing their professional and organizational community that can be shared within the rest of the organization.

Moreover, the written nature of the practice allows a tracing of the development of the action research experience, which helps researchers and practitioners to evaluate learning through joint interpretive work. In effect, comparing the three columns fosters insights around specific individual or collective changes. We will illustrate this process through a case study, which will examine specific opportunities and threats of creating a dialogic space using reflexive writing within an action research approach.

The Case Study

The Context

The action research project took place in a Federation of Nursery Schools, a Northern Italian organization that manages services and centers for child education in nursery schools, and provides training, consultancy, and innovation strategies. The Federation coordinates 160 schools, organized in smaller networks. At the beginning of our intervention, each network was coordinated by one pedagogical manager and one administrative manager. These two roles represented two cultural anchors: the pedagogical one, for which managing meant planning and supporting the educational activities, and the administrative one, in which managing meant providing advice and assistance in running the service. This structure had functioned effectively for many years. However, as the Federation became larger and more complex, several limitations were recognized, including fragmented or chaotic communication between the administrative and teaching areas, and lack of flexibility in dealing with complex critical situations.

It was thus decided that a new role was needed: the pedagogical and administrative roles were subsumed into one, which resulted in new responsibilities, new actions and practices, and a structural and culture change. Whereas in the past managers used either their pedagogical or administrative content-driven expertise to maintain well-established procedures, a clear division of work, and defined role boundaries,

in the new organization, managers were required to cross boundaries and become more process experts, able to analyze complex situations, mediate conflicts, activate networks and relations, and develop the problem-solving skills of other employees.

We were invited to carry out an intervention to help the new managers build and interpret their new role. Initially, the Board requested a consultancy project to help the managers interpret their new role in a shared manner. However, from our point of view, it was first necessary to produce knowledge about this new role and the new practices supporting it because it was entirely unprecedented and there were no similar change experiences reported in the literature. We proposed to conduct action research in which the managers would be engaged with us as co-researchers in producing knowledge about their new working practices. Because of our responsibilities as a research team, we decided that two of us would co-research with the managers, while the others would stay "backstage" to coordinate the process and report to the managerial Board.

The Action Research Process: Reflective and Reflexive Writing

Helped by the Board, we recruited a group of 25 managers to participate in the action research project. Each had different backgrounds, stories, and positions, having previously been either pedagogical or administrative managers. Our challenge was threefold: (a) to help them reflect on how their daily practices were informed by different logics than their previous expertise, (b) to help them share the knowledge arising from their previous and actual experience, and (c) to revise these practices and knowledge cooperatively according to the changed organizational needs.

Eight meetings were held with the managers over a 1-year period. About every month, we asked them to write at least one account of their experience (first and second columns), to be circulated and discussed during the group meetings. These were collected in a blog, and each month two or three writings were voted as the most representative and meaningful cases to be discussed more deeply in the group. This strategy allowed both the group to identify the *hot issues* to be discussed along the way, and single managers to be the protagonist of the collective work. From a researchers' perspective, we felt a degree of vulnerability in handing the selection of issues to the managers, as they were not necessarily the issues we would have identified. This meant recognizing the need to relinquish the control we often feel we need to have over our research, and be responsive to our co-collaborators.

During the meetings when the chosen writings were read and discussed, we maintained a kind of *scaffolding function* (Alby & Zuccheromaglio, 2006), helping managers to connect their personal experiences to the story, describing different possible views and strategies of action, and helping managers

critically question the taken-for-granted knowledge and expertise emerging from their accounts. At the end of each session, we invited the group to help the author edit the third collective column. Here the outcome of the group discussion was reported, together with new insights and learning. This moment represented a way of tracing how new meanings and practices were being built collaboratively. New situated knowledge and new agreements could then be progressively shaped around alternative ways of seeing and enacting the new managerial role. Finally, after this step, a new reflective/reflexive writing could be validated and further discussed.

At the end of the research, about 200 reflective and reflexive writings were edited and collected, 20 of which were discussed during the meetings. Overall, each manager composed 8 texts, but not all of them were discussed in the group. We did analyze all 200 at the end of the action research to help compose a final report, discussed with the managers. This allowed evaluation of the new trajectories in their community, and the identification of new perspectives and orientations to be shared with the rest of the organization.

Moving Toward Reflexive Dialogical Action Research: Illustrations

This section offers examples from the reflexive practices developed in the action research through two vignettes, which show how we worked on the managers' writings. In both these examples, analysis of and reflection on the material was guided by the theoretical framework developed by Emirbayer and Mische (1998), which appeared to us particularly suitable for helping the managers analyze their practices by considering their different agency orientations and their impact on their new role and mandate.

Within this framework, agency is the ability to interpret the situation and roles not as passive and repetitive executors, but as aware and influential authors of new knowledge and new possibilities of action (Emirbayer & Mische, 1998). Three possible *agentic orientations* can be displayed in managing organizational change:

Iteration—the selective reactivation by actors of past patterns of thought and practice

Projectivity—the reconfiguration of the present in relation to future plans

Practical evaluation—the ability to make situated decisions and to shape new courses of action in response to a deeper understanding to emerging demands, dilemmas and ambiguities or presently evolving situations. (pp. 171-172)

In our view, the more managers developed both a projective and a practical evaluation orientation, the more open they could become to the contextual, complex, and relational factors that influenced their course of action, and the more able to author their realities.

First Vignette: New Role Boundaries

During one meeting, we found ourselves discussing an episode relating to the management of lunchtime at the school. This apparently ordinary issue triggered an interesting discussion on inter-professional work and boundary management, and seemed to require the new managers to revise their agentic orientation.

Lunchtime usually involved the cooperation of staff with different professional roles (teachers, educators, auxiliary personnel, and catering staff), as well as children, who might be involved, for example, in distributing food, utensils, and drinks. These actions often created disorder because they required a high degree of cooperation. As one manager described in his writing (see Table 2), managers were required to help the staff deal with lunchtime challenges, particularly the practical and physiological overlaps among roles.

We decided to begin the discussion of this writing with the request to identify the organizational actions undertaken by the manager-author and to comment on them briefly. We believed that this would help the group to reflect on the logics and the agentic orientations underlying every action described. The following group discussion immediately focused on excerpts such as “re-designing a formal structure that many have forgotten” through “explanation of the new organization chart.” The group felt that, in this account, the manager enacted a projective agency (Emirbayer & Mische, 1998). Several participants noticed that without any other evaluation of the context, the specific situation in which the event occurred, or of the stories of its protagonists, the manager had proposed a new operational model by exerting generic pressure for a reconfiguration of the present in relation to the future: “things have changed at the school, but many staff members have not yet realized it, or they resist the new situation. It has seemed to me useful to explain the new organization chart again.”

One of our challenges was in deciding how to engage managers in reflexive dialogue around the logic and meaning of the practices, when as researchers and educators we often perceive ourselves as “experts” in our field. To facilitate reflexive dialogue, we offered questions such as the following:

What type of role/position is the manager attributing to himself or herself in this episode?

What is the history of the professional groups involved, and how can this history explain the positions that they assumed?

What is the history of this school, and what significant episodes can describe it?

How have relationships among roles been regulated until now?

These questions were offered to encourage the managers to think about the contextual and historical dimensions of

Table 2. Example 1: The Critical Event Account.

First column: Critical event	Second column: On the spot
<p>We are at a meeting and discussing issues related to school life. A teacher proposes that, during lunch, the teachers should be flanked by a member of the cafeteria staff, who will help the children and the teacher herself to manage the meal—as already often happens during the afternoon break. The cook intervenes by saying: “Now that’s enough, you can’t keep on having the assistant at your beck and call. She’s not your maid, she doesn’t provide a service inferior to yours. You have to understand that when you take her away from her work for your convenience, she has to do the things that she hasn’t done by working overtime, and this happens almost every day.” This outburst has been expressed in highly emotional language. The teacher addressed by the cook reacts violently. She disputes the cook’s right to interfere in educational decisions that are up to the teachers, and she also criticizes the way in which she constantly denigrates the teachers, and also in the presence of children.</p> <p>My reaction has been to rebuke both the teachers and the cook in order to halt an excessively conflicting exchange. I have therefore re-presented the Federation’s new organization chart, and I have clarified the roles of each professional figure. According to the new organizational structure, the assistants can furnish a service in support of the teachers, but only if it is pertinent to their role.</p>	<p>It is not acceptable to address problems by insulting each other. Things have changed at the school, but many staff members have not yet realized it, or they resist the new situation. It has seemed to me useful to explain the new organization chart again. In this way I have drawn a sharp boundary between the staff members, and I have contributed to re-designing a formal structure that many of them have forgotten.</p>

their practices. This was important in valuing their expertise and helping them reflexively question what they were taking for granted, but meant that we found ourselves working hard not to offer advice but to engage in the inquiry process. Together we discussed alternative approaches more consistent with a *practical evaluation* orientation, in which the managers assessed the specific circumstances and conditions in which the new organization chart could be matched to the school’s specific features. We offered questions such as the following, to encourage managers’ reflections and reflexivity on these aspects:

What do you think the new organization chart has meant for the actors involved?

What new logics does it propose? (*reflexivity*)

How can the new organizational project be implemented in this specific context, given its history? (*reflection*)

One issue we considered was the careful phrasing of questions to elicit both reflective and reflexive dialogue around the issues: to help the participants share their viewpoints and look to the future in a proactive way, without judgment and censure.

At the end of this session, in the third column we all together wrote summaries of the discussion and the learning achieved by the group as a whole (see Table 3). All the managers validated this writing.

This discussion helped the managers to re-consider their own and other actors’ positions in role–boundary conflicts:

“This episode concerns the different ways in which schools employees interpret different roles.” The possibility of exploring the historical and contextual dimensions underpinning such a critical episode, together with the analysis of the agentic orientations displayed by the actors involved, helped us recognize new and more effective opportunities for interpreting the managerial role: “. . . here we see firsthand the importance of being a manager of processes. It is not possible to intervene prescriptively and generically in a conflict of this type. A call to order is not enough.” One proposal that emerged, for instance, was a training course, which could allow a more collective reflection on how the role boundaries were changing due to the reorganization, and how this was affecting power and identity issues: “Designing a training course after a conflict among roles is a way to develop a proactive attitude toward, and conscious management of, both the contingent and the identity problems by everybody.” One issue we faced as a research team was that while encouraging reflexivity, agency through practical evaluation, and participants to become “managers of processes” and “promoters of organizational learning,” rather than authoritative guardians or operative executors of top-down prescriptions and rules, we were doing so with 25 managers embedded in a wider context in which other organization members had not participated. This can place action research participants in a vulnerable position in which they struggle to enact a new way of thinking and acting with participants who have not been part of the project. This raises a number of ethical issues around the responsibilities of “academic” action researchers for the impact of their work.

Table 3. Example 1: The Group Comments.

Third column: Group comments

Discussion with colleagues has shown that what happened was not an isolated episode; rather, it is commonplace in schools. This episode concerns the different ways in which school employees interpret different roles. The catering and auxiliary staff felt themselves "children of a lesser God" and often assumed oppositional positions. The teachers seemed to claim for themselves complete power relative to the educational sphere, forgetting that the educational task must be shared.

This episode seems to demonstrate a need for training and reflection on role boundaries and the organizational mandate for all the actors involved.

As regards the managerial role, here we have seen at firsthand the importance of being a manager of processes. It is not possible to intervene prescriptively and generically in a conflict of this type. A call to order is not enough. This reorganization and our joint reflection have enabled us to envisage possibilities for intervention less to do with the operational solution of educational or administrative problems and more closely centered on constructing new conditions for organizational learning. Designing a training course after a conflict among roles is a way to develop a proactive attitude toward, and conscious management of, both the contingent and the role-identity problems by everybody.

Second Vignette: Door to Door

This second vignette describes a problem concerning enrollments at a school. This appeared to us a crucial issue, because if a school does not reach a minimum level of enrollments, it loses a large amount of funding. In the previous organizational design, enrollment was managed centrally by the Federation. In the new one, the managers had the mandate of organizing initiatives to promote the school in the local community and enroll students. In one selected writing (see Table 4), a manager recounted how she took up this challenge.

The reading of the case caused uproar among the participants. Some of them said that the colleague's action was inappropriate: it was too market oriented and typical of private and for-profit companies. Conflict arose around the degree of entrepreneurship and market orientation required, expressed in excerpts such as follows:

I do not know whether our work will be helpful in recovering the missing enrollments, but it has been useful for the revision of prejudices and beliefs about our role and for safeguarding the image of the school. . . . My and the secretary's initiative has been an important opportunity to make contact with families that normally exchange only a few words with us and do not know how the school works.

Our concern at this moment was the judgmental stance of participants, the impact on the manager, and our ability to handle the situation and bring it back to a constructive dialogue. As data collectors and/or observers of action, we are rarely exposed to situations in which we have to intervene and our credibility as researchers may hang on how we do so. We experienced a degree of tension not only in this example, but also throughout the questioning process, because in asking the managers to critically examine their previous experiences and certainties and consider the specific needs and differing interpretations of all parties involved we could provoke conflict, feelings of vulnerability, and resistance. We reassured the managers that our intention was to search for

Table 4. Example 2: The Critical Event Account.

First column: Critical event	Second column: On the spot
<p>The secretary is seated at her desk and she greets me cordially while I ask her how many enrollments have been made. She answers that there have been 149 enrollments so far, but there are still six or seven children who haven't enrolled yet and who could make the difference.</p> <p>We examine the list of the names of the children whose parents have not yet applied for their enrollment at the school. Considering that, probably because of culture or through simple habit, the written notices sent to the parents have not been read or understood, I suggest to the secretary that we go together to the homes of these children and make a last attempt with their parents. So we spend the whole morning going to talk to people on the margins of social and community life, sometimes without anybody answering the bell.</p>	<p>I do not know whether our work will be helpful in recovering the missing enrollments, but it has been useful for the revision of prejudices and beliefs about our role and for safeguarding the image of the school. In the past, notification letters were sent to the families, and then we waited. Only on closure of the enrollments did we discover whether the number had been reached. We cannot go on like this anymore.</p> <p>My and the secretary's initiative has been an important opportunity to make contact with families that normally exchange only a few words with us and do not know how the school works. It is useless to complain about the low number of enrollments. (...) Complaining is a pointless exercise. It should be abandoned because the times and opportunities no longer permit it. This delicate moment for the school must be managed proactively, especially in this community, where we find it difficult to communicate with families. Monitoring the number of enrollments so as to take action before it is too late seems the best strategy to me.</p>

new and more suitable solutions, not to allocate blame or correct behavior. This meant trusting our own ability to manage conflict constructively, and, because of the nature of the research, to enact the reflexive stance we were advocating.

Although the research team can anticipate such situations arising, having two researchers in the meetings working together to deal with the conflict helped allay our fears and work together to shift the conversation toward enabling the group to interpret the type of agency (*practical evaluation*) enacted by the manager. Some managers commented that their colleague assumed an approach whereby she was not just generically proactive but also able to tailor her action to the specific context: “This delicate moment for the school must be managed proactively, especially in this community.”

On the basis of this analysis, we invited the group to relate the episode to the new managerial mandate and the history of the school community in which the events had occurred, through the following stimulus questions:

How do you think the Federation’s mandate may be interpreted in this specific situation?

What are the functional characteristics of the school where this episode occurred?

What are the characteristics of the local community, and what challenges do they raise?

How do you think the manager’s action was perceived: as a sign of concern or as an intrusion?

What level of proactivity do you think is suitable in a context like this?

During the ensuing discussion, we had to deal with a conflict stronger and more explicit than the one described in the first vignette. Here the Federation’s mandate was called into question, and we were afraid of being seen as powerful supporters of the Board and its new marketing requirements, which could have led to resistance and an erosion of our credibility and our ability to help facilitate learning and change. We found ourselves facing a delicate situation in which we felt that our “neutrality” could be questioned. We handled this by pointing out that our role was not to force the managers to espouse a new and more marketing-oriented position, but to reflect about what public profile should be constructed and adapted to their local contexts and to their new mandate. Considering the episode from this perspective helped the managers reflect on the different possible agentic orientations in interpreting their role, and alleviated any concerns about our role. Despite conflicting opinions, the group was able to reach some agreement on the need to identify new ways, more context sensitive, of relating with the local community to promote the school and safeguard its image.

In Table 5, one notes that the main outcome of the group discussion was not the choice or validation of a specific managerial action, but rather of a new approach once again consistent with a *practical evaluation* option:

Table 5. Example 2: The Group Comments.

Third column: Group comments

The case has provoked discussion. But we have all agreed that times have changed and it is no longer possible to wait for enrollments, or to rely on the role of the ‘beacon school’ that grants families places for their children. . . . We agree that today it is necessary to assume a different public profile and take a step forward toward the users, rather than waiting for all, or almost all, of them to come into the secretary’s office. As for deciding the most appropriate ways to do this, there is still a long road ahead and we must resume discussion on this.

We agree that today it is necessary to assume a different public profile and take a step forward toward the users, rather than waiting for all, or almost all, of them to come into the secretary’s office. As for deciding the most appropriate ways to do this, there is still a long road ahead and we must resume discussion on this.

The need to discontinue consolidated and *iterative* practices, but to develop a proactive stance, was considered to be the line of development for the new community of managers.

The Final Evaluation: Setting Up a New Repertoire of Managerial Practices

In this section, we will discuss the evaluative work conducted on the overall corpus of writings to share a final and reflexive report of the action research experience.

For the purpose of final assessment, we devoted the last meetings to joint analysis and discussion of the material collected during the year. We first organized the writings on the basis of the recurrent thematic areas and the hot issues discussed. Then, together with the managers, we worked to classify the managerial actions described in the accounts according to Emirbayer and Mische’s (1998) three agency orientations, and we discussed them with reference to the organizational changes in progress. In the first session, we created several thematic maps of managers’ activities, which we then organized and proposed for further discussion in a second encounter. We then decided to invite the managerial board to a final discussion of the action research report, to create the conditions for its sharing with the rest of the organization.

Table 6 provides an extract of one of these maps, relative to the theme of the management of professional boundaries within multi-professional situations.

The final map enables us to identify the issues and problems around which new knowledge and change are more or less easily generated: the issues that we felt could be more comfortably handled in a group setting, as well as the more controversial problems that could have been difficult to

Table 6. Thematic Map.

Iterative orientation	Projective orientation	Practical evaluation
Faced with a problem of communication with parents, my competence consolidated over the years has helped me to handle interviews in a competent and balanced manner. I do not know how a colleague with an administrative background could have managed issues of a purely psychological nature. I have deployed psycho-educational skills, and these have helped me a great deal in problematic situations.	Such a delicate phase in the life of a nursery school must be managed systematically, as described in the new organizational model.	Times have changed and it is no longer possible to loftily accept enrollments, or to rely on the role of the “beacon school” that grants acceptance of applications. It is perhaps necessary to assume a different public profile and to take a step forward toward the users, rather than waiting for all, or almost all, of them to come into the secretary’s office. Complaining is a pointless exercise. It should be abandoned because the times and the opportunities no longer permit it.

reflect on in the group and that might have required more sensitivity and awareness on our part. The overall opinion expressed in the discussion was that the Federation’s new management model should largely be consistent with the notion of *practical evaluation agency*. Being able to perform one’s role by exercising discretion in dealing with the requirements of the organizational context in which one works, becoming an activator of processes rather than an expert on contents, appeared to be the orientation in which the managers had finally decided to invest.

Discussions of this type led us to the construction and validation of the new repertoire of practices, which we deemed sufficiently promising to circulate within the Federation. By virtue of the reflexive work on the writings, it was possible both to move from individual and group learning—a *first- and second-person action research*—toward an organizational level. The analysis and discussion of the overall corpus of writings in effect enabled us to construct first traces and indicators of a new management mandate and of a new set of practices, to be shared and discussed with the rest of the Federation (*third-person action research*).

Discussions with the managers on the outcomes of the action research were challenging moments in regard to our role and position as researchers. Reacting to the final report, some managers questioned our role as facilitators of the process, making comments such as: “This kind of approach means that in the end we did everything ourselves! I mean, we wrote the third column and commented on it. So what exactly is your role?” Yet this delegitimization of our role was tempered by a strong reluctance on the part of some managers to recognize themselves as co-researchers, assume

ownership of the work, and to receive approval from an experienced researcher. We experienced tensions around managing the need to refuse to assume the “strong” role required of us—and the fear of being belittled by the managers for such behavior—and to be seen as making a contribution. To prevent the entire process from being undervalued, we repeatedly stressed the importance of being co-researchers in action research to make the knowledge produced important and meaningful to all the parties involved.

Discussion

The examples presented above highlight how, within an action research, a collaborative dialogical space for learning and change can be created to help move participants and researchers toward reflexivity.

This approach presents potential contributions for *practitioners*:

1. Providing opportunities to reflexively explore *how things work* in their organizations.

When facing change, practitioners are challenged to monitor how things work (Watson, 2011) in their complex realities, by deeply understanding the multiple voices speaking, by contextualizing their actions and interactions, and recognizing their role in shaping these “realities”—an experience also shared by researchers.

The writing process, followed by dialogue, sustains a subjective and intersubjective process of inquiry and confrontation (Cunliffe, 2010). In the writing accounts, the managers provided a tale *from within* (Shotter, 1993) of meaningful events occurring in the daily life of their schools. Such thick descriptions were not neutral, but represented subjective interpretations where the writers described themselves and their specific ways of authoring their professional and organizational realities. From this unique perspective, different organizational pictures were painted, each with its specific details and nuances, and sometimes with its conflicting colors. These provided a rich opportunity for a collective confrontation, exploration, and a basis for a new polyphonic account of organizational life and potential opportunities for moving on (Shotter, 2008).

Furthermore, the contextual and historical dimensions of each single account can be brought to the fore and analyzed. Our role was often to encourage managers to reflect and reflexively question the logics of their actions and agency, by helping them focus on specific situations. This collective voicing (Pässilä, Oikarinen, & Harmaakorpi, 2015) enables practitioners to develop a deeper understanding of the local and contextual underpinnings of their practices, develop a situated understanding of habitual practices, and begin to reflexively question what was taken for granted to more proactively face new demands and changing expectations. Finally, our guidance helped manager discussions move

from simple *problem-solving* to a *collaborative and reflexive research* path. By participating in different research practices and ways of talking, practitioners may develop an attitude of reflexive inquiry and become more aware of how to jointly research—in a more in-depth and comprehensive way—around their complex organizational problems.

2. Sustaining participation and learning at individual and collective levels.

Writing personal accounts is a time and resource-consuming effort, but allows a deep engagement of writers and readers. Managers' lived accounts become concrete, detailed, and shareable materials, which surface emotional identification and involvement and provide a focus for dialogue. By writing and reading the texts before discussion, the managers commit themselves to select the meaningful issues to debate, and to come to meetings prepared and ready to focus on specific, concrete, and relevant problems. The written nature of the texts facilitates multiple readings, a focus for dialogue around the exploration and analysis of practices and assumptions, and the development of insights and new orientations for action. Furthermore, the three columns offer a means by which the multi-layered nature of our social realities—the intertwining of individuals and communities—can be explored. The first two columns represent first-person action research, individual narration, and reflection. They offer a way of giving voice to every single participant and for helping each manager collect a repertoire of personal stories and reflections that become an insightful basis for individual and group learning (Marshall, 2011). The space for group dialogue and editing of the third column allows individual and collective second-person learning (Marshall, 2011). The collaborative dialogical space in which we discussed the individual writings offered opportunities for the managers to take positions, make their voices heard, and contribute their interpretations and ideas for action. It also enabled all of us to tune-in with other accounts by recognizing their own stories in others' stories and by encountering divergent ideas. This occurred in the collective process of questioning each other's taken-for-granted ideas (Sykes & Treleaven, 2009). Our role was to facilitate inclusive and equitable dialogue, to encourage reflexive questioning, to avoid superficial and quick answers, and even to welcome conflicts and divergences that are often ignored. Finally, we helped managers figure out how to move on through the editing of the third column, which becomes the impetus for learning: a visible trace either of shared achievements or of open and unresolved problems.

Reflexive dialogic action research therefore allows managers to become authors and owners of the process of co-researching, learning, and change. In the example given, managers became more able to question their iterative or projective orientations when facing new and complex situations, and more willing to experiment with new forms of

agency, that is, linked with practical evaluation attitudes (Emirbayer & Mische, 1998).

At the end of the process, the analysis of the entire corpus of writings organized in a map presents a meaningful way to make the action research achievements visible and to activate a third level of researching and learning (Marshall, 2011). By reporting them and discussing with the rest of the organization, new opportunities for enlarging the participation to the action research path can be finally negotiated and nurtured.

The potential benefits of this approach for *researchers* include the following:

1. Bridging theory and practice by developing *relevant* knowledge.

In our perspective, action research is not only a problem-solving process but also a methodological approach that aims at furthering relevant knowledge, by integrating theory and practice. Developing relevant knowledge in academia is becoming increasingly important as highlighted by the Association to Advance Collegiate Schools of Business (AACSB) accreditation standards, the Research Excellence Framework (REF), and research funding bodies, all of whom who have criteria around engagement and impact. Generating relevant knowledge means not only providing an *instrumental* contribution to practice in terms of applying knowledge to practice but also generating a *conceptual* contribution in which rigor and relevance are seen as compatible and both practitioners and researchers generate new perspectives on and insights into problems and practice (Nicolai & Siedl, 2010).

Reflexive dialogical action research allows us to make both instrumental and conceptual contributions by developing theory in practice: creating knowledge around the taken-for-granted logics of action underlying managerial practices. This new awareness allows us to construct new theories in action and reorienting practices. Second, the three columns of reflexive writings make it possible to identify the diverse agency orientations used by managers to address different types of problems, as well as uncovering the relational contingencies in response to which these orientations change. We offer examples of how this form of research facilitates the bridging of the academic-practitioner, theory-practice gaps.

2. Reflexively examining the researchers' own practices.

Reflexive dialogical action research allows researchers to learn how to reflexively question their own "normalized" ways of generating knowledge and to explore new ways of collaboratively developing knowledge of relevance to both theory and practice. This can be a stressful experience because it involves relinquishing control of the research process and being open to what may transpire. In the examples we offer, we have shown some of the tensions we faced: being delegitimized by participants, handling conflict, and avoiding the

temptation to manage our “felt” vulnerability by imposing our expertise. It is important to build trust, not just in the co-research process, but also in the contribution of all the co-researchers.

A further tension may also arise because this method makes visible—through the written texts (the columns and map)—the effective and ineffective practices of both practitioners and researchers. For example, during the final evaluation phase, we realized that although we had been able to help the managers discuss several *hot* issues related to their work in the schools and within their local communities, we had encountered several difficulties in handling their relations with the Federation and with the managerial Board. Our fear of being perceived as “the weapon of the powerful” and experiencing a conflict between ourselves and the group induced us to make some prudent choices. As described in the second vignette, for instance, we decided to leave some controversial issues open and take more time to discuss them. In this way, however, we lost the opportunity to reflexively work with the group on the power dynamics involving us, the managerial Board, and them as new managers.

Practices like these often lie hidden in other forms of research, and can have both positive and negative outcomes: Although the researcher may feel vulnerable because his or her practices are open to scrutiny, a valuable learning opportunity exists in being able to reflect on how researcher interventions facilitated or prevented new insights.

Conclusion

We have addressed the issue of how to bridge the world of practitioners and academics by co-constructing relevant knowing and learning through *reflexive dialogical action research*. Specifically, we have offered reflective and reflexive writing practices that can be used as a basis for dialogue and for fostering practitioner and researcher learning.

A number of conditions are required to facilitate the effective implementation of a reflexive dialogical action research:

First, we agree that this approach may not be meaningful in every context, but suggest that reflexive dialogical action research is particularly fruitful in organizations where there is a demand for/commitment to exploring the efficacy and impact of certain routines and work practices that have stabilized over time (Galuppo, Gorli, Scaratti, & Kaneklin, 2014; Ripamonti & Scaratti, 2012; Snoeren, Niessen, & Tineke, 2011). In health care settings, for instance, there are numerous examples of action research enhancing the quality and safety of care services through the active engagement of health care professionals and sometimes patients. Such interventions offer the possibility of reflecting on and revising hierarchies, power relationship, professional boundaries, and their impact on the quality of care. As in the present case, reflexive dialogic action research is appropriate in the context of an organizational change where making sense of an evolving culture and how this affects the professional identities of the actors

involved in it is key (Gozzoli, Frascaroli, D’Angelo, & Licari, 2014).

Second, there must be a strong mandate and commitment from the organization’s top management and from participants to support co-researching that goes beyond a mere problem-solving process. The writing and dialogue practices require a major investment from managers and significant willingness to share emotion-laden professional experiences with colleagues and researchers. This mandate should also formally acknowledge that co-researching through reflexive writing practices is a resource-consuming effort, which requires commitment and time. Researchers have the responsibility of carefully negotiating these aspects to guarantee the sustainability of the process.

Third, there needs to be an interpersonal climate marked by a sufficiently high level of trust. Confiding ineffective actions to colleagues may reveal weaknesses and errors and therefore it is necessary to negotiate a clear and explicit agreement of reciprocal trust and confidentiality with those participating in the action research, and to periodically return to this agreement. In this regard, the selection of situations to discuss in the group is important. Personal situations or issues of work overload are often inappropriate, as a risk lies in manipulating the group for personal gain, rather than using individual experiences to develop collective learning. It therefore must be agreed that the topics should relate to work-based interactions and shareable problems and issues, rather than individual concerns, which require other settings to be addressed.

At the same time, researchers themselves should be ready to be reflexive about their role and feelings in the action research process and make these explicit to each other as well as to research participants when appropriate. Different researchers may perceive the sensitivity of topics differently, have different degrees of experience working with practitioners (as in our case), may notice different issues, and feel more or less comfortable in addressing conflict or empathizing with various practitioners. It is therefore important for researchers to be reflexive about their own experiences and discuss these among research team members.

Finally, during reflexive dialogical action research, it is important that participants progressively increase their skills and their autonomy in editing, interpreting, and discussing the reflexive writings. Researchers and managers need to have a degree of narrative and reflective/reflexive skills to be involved in such a practice. Furthermore, though the researchers should take the responsibility for facilitating a setting that generates dialogue and reflexivity, they must also be willing to surrender part of their control to give space to participants (Galuppo, Gorli, & Ripamonti, 2011). This requires reflexive dialogue around their own power and its implications for the action research process, and to be ready to discuss choices, when required by the situation.

We believe that reflexive dialogic action research offers a promising and interesting path for bridging the worlds of researchers and practitioners by collaboratively generating knowledge.

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