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**An evaluation of action research methods in
developing a national instructor induction package
for a Private Training Establishment**

**A thesis presented in partial fulfilment of the requirements for the
degree of Master of Adult Education**

**Massey University
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New Zealand**

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**My thesis is dedicated to
the New Zealand Red Cross team that made this work possible**

ABSTRACT

The provision of appropriate, needs based workplace induction training programmes is recognised as an important step for new staff in many industries. This thesis investigates the way in which action research processes can be used to enhance the induction of new instructors within a Private Training Establishment (PTE). The research was conducted within an educational workplace context where action research methods were applied in practice and where the action research group developed a new instructor induction resource by working together collaboratively to identify and solve their problems. Evaluative action research processes were used to assess the effectiveness of the team approach.

Data was gathered during three collaborative action research cycles (plan, act, observe and reflect) over a period of 12 months. Information was obtained from collaborating group workshops which included review discussions, reflective practice and evaluations, verbal and written feedback from new instructors and other key people, and researcher autobiographical journal notes. The data was analysed using spreadsheets and group discussions of recorded information.

The results show how an increased level of member participation and collaboration can inform the research methods and direction as well as benefit induction processes and professional development outcomes. Working together collaboratively helped the group to find new ways of addressing their specific induction issues, primarily through better understanding and appreciation of each other's knowledge, ideas and views. A range of factors both influenced and enabled the participating group to solve their problems in a way previously not articulated. Notably these included discussions, academic readings, group collaboration, and increased group trust, sharing and openness. The time between group meetings was identified as being the major constraint.

The findings demonstrate the positive contribution that action research methods can make to effective problem solving, particularly when managers of educational organisations wish to proactively improve their business and educational standards.

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CHAPTER 1

INTRODUCTION

1.1 THE RESEARCH CONTEXT

From my reflective journal, May 07

*"No man is an island, entire of itself; every man is a piece of the continent."
John Donne, Devotions (1624).*

My job has been about "quality" and all the bits in-between. Each aspect of the job (certificates, police vetting, curriculum, audits, training materials, ordering, reprinting, attending committee meetings, review procedures, assessment, moderation, improvement) are, like good induction, linked to standards and skills.

My input into the research would assist the organisation to include best practice processes into teaching and learning.

Whilst this research aims to improve the way we induct our training staff, I cannot predict the outcomes. It's very exciting.

1.1.1 The New Zealand Red Cross

The New Zealand Red Cross is a national society which, along with 185 other national societies, provides humanitarian assistance to millions of vulnerable people internationally. Staff and volunteers provide help to those affected by armed conflict, natural disasters or poverty and also help to prepare communities to cope with potential local crises.

The New Zealand Red Cross mission statement, "*New Zealand Red Cross is dedicated to the protection of human life and dignity by the alleviation of suffering*" summarises the organisation's primary purpose and orientation.

In New Zealand, provision of training and education is an important part of Red Cross core activities, particularly relating to the community services portfolio. The core activities include the following areas: *promoting the movement's fundamental principles, Geneva Conventions and additional protocols advocacy on humanitarian issues; international disaster response and development programmes and emergency management; and community services.*

The New Zealand Red Cross is registered as a Private Training Establishment (PTE) and is accredited by New Zealand Qualifications Authority (NZQA) to provide training and education.

The organisation employs approximately 90 - mainly casual - instructors to provide training throughout New Zealand for unit standards such as First Aid, Pre-Hospital Emergency Care, Workplace Health and Safety and Essential Emergency Management.

New Zealand Red Cross also provides certified and community courses in areas mostly relating to first aid, child minding and emergency preparedness for local groups and school-aged children.

Operationally instructors work within their local Red Cross Service Centre office structure, and each of the regions has a training manager and several training coordinators whose primary responsibility is to run the training and education part of the business.

Instructors are employed as required and, prior to teaching, need to meet specific criteria or unit standards as set by NZQA, or the appropriate Industry Training Organisation (ITO). Each criterion is specified as a pre-requisite for any unit standards taught and skills or academic achievement must be demonstrable.

For example, teaching First Aid – the major part of the Red Cross training business - requires specific competence levels including technical (Pre-Hospital Emergency Care unit standards and NZ Resuscitation Council requirements), assessment skills (unit standard 4098) and teaching ability (adult education certification).

The New Zealand Red Cross Training Quality Management Manual (TQM Manual) lays out all aspects of the training and education business including the current validation and revalidation requirements for instructors of the various courses provided. Annual evaluation reviews of all sections of the TQM Manual identify the training and education priorities which are subsequently implemented according to national and regional action plans. This research is an examination of one of these priorities.

1.1.2 The Red Cross Strategic Plan for Induction

From my reflective journal, April 07

I was reminded to be an advocate for the achievements of the group who worked together tirelessly over the years. This group has worked so hard.

I wrote a page long list of their achievements.

This group:

- Had bedded in the whole new way of working together interregionally*
- Had agreed on ways to move forward*
- Had full involvement in improvement processes*
- Had ticked off a monumental "to-do" list.*
- Had been responsible for the increasingly successful audit results.*

The aim of this research is to come up trumps for our next priority, instructor induction. So it's into the saddle we get, over the bridge we ride and together we will get through our objectives.

Quality assurance systems underpin all work undertaken by the New Zealand Red Cross education and training team, and both strategic and operational processes undergo regular planning reviews to ensure continued improvement and responsiveness to client needs.

In 2007 the business priority included the development of a national instructor induction process. The Regional training managers and coordinators representative group, who had worked together on improvement processes for several years previously, concluded that whilst they saw positive aspects to the induction processes they also recognised significant regional variations relating particularly to quality and appropriateness.

The group acknowledged that improvement to induction processes would not only advance regional consistency and help instructors gain the necessary knowledge and skills for their job but would also facilitate staff integration and promote a satisfied and highly productive training team. Recent new employee feedback, which identified that progress towards a streamlined and well defined induction process would benefit the organisation, also supported the management group's strategic planning conclusions.

In my role as Quality Assurance Manager, Training, I would be expected to take a leadership role as well as taking an active part in implementing any resulting strategic planning decisions. I was responsible for quality outcomes for the business, yet I relied on the input, implementation and goodwill of the training management group whose reporting lines were regional.

From 2003, I decided to use a collaborative leadership style for meetings where discussions essentially focussed on the group's making decisions to solve the identified problems. The team's interregional cooperation in this manner resulted in positive national outcomes including increasingly successful audit outcomes.

When considering options for the successful development of a national induction process, I acknowledged that outcomes depended on implementation across a regional structure throughout the country.

I initially sought senior management support to commence development of the induction process using the team of regional representatives, and proposed to work collaboratively with the group using Participatory Action Research (PAR) processes and inviting the group to become part of an evaluative action research process to evaluate how well PAR worked for them. After discussion, Red Cross management agreed to the research and signed an Agreement to support it.

Whilst the development of an effective induction package was seen as attractive because it would go a long way to providing relevant and appropriate workplace training which increased the skills of new staff and therefore prepared them for their job, it would also provide an opportunity for the organisation to trial a planned team-work approach by using an action research framework. Because cooperation was not new for many of the working group, evaluating the use of deliberately collaborative and cooperative problem solving with a facilitative leadership orientation promised to provide useful individual and management learning, whilst at the same time developing a new national induction process.

One new group member was not aware of the progress successfully completed by the group over the previous years, so an itemised list was compiled to support the

recommended action research proposal. The majority of the dot points addressed the quality systems or practice in the field and the remainder related to addressing issues raised through the quality audit. Following group meetings, almost all the action points were subsequently achieved by the group members within their local regions. The organisation's positive audit outcomes were a measure of the groups' commitment to succeed.

It was essential to secure management commitment and sign-off for the research prior to obtaining ethical consent and commencing detailed planning.

1.1.3 The researcher

In my role as Quality Assurance Manager, Training for New Zealand Red Cross, I was based at the National Office, Wellington. The job, with its focus on improving the quality management systems within training, readily lent itself to my role as principal researcher, which enabled me to contribute fully to the facilitation and administration processes. The potential, or perceived, conflict of interest between my role and the research is dealt with later.

Whilst I have a Business Diploma and a degree in both Nursing and Adult Education, primarily it was my personal interest in action research which fostered my enthusiasm for being an active part of the collaborating group.

Motivated by the strategic imperative to produce a robust induction product which could be used nationally for all new instructors, and being genuinely interested to see how well PAR methods could be used to achieve this, I was keen to promote - and participate in - a collaborative action research approach.

More exciting on a personal level, however, was the agreement of the working group to engage in evaluative action research to look at how effective working together to solve the problem actually was. This commitment was immensely supportive, not only for the action research process, but also for enabling me to prepare this thesis.

As principal researcher I agreed to complete much of the project researching and documenting. The collaborating group input involved time allocated as part of three of their scheduled meetings with the following time components:

- The *participative action research* to collaboratively work through the induction problem included a three-hour planning meeting, two full day development workshops and a three-hour meeting to address the induction package evaluations, as well as some preparation and checking work completed back in the members' regions.
- The thesis *evaluative action research* discussions which members opted into included three meetings of approximately one to two hours, depending on the requirements of, and by negotiation with, the group.

Maintaining a reflective autobiographical journal became a vital resource in terms not only of contribution to the triangulation of data, but also of my personal learning and deliberation. Actively engaging in reflective practice provided me with a mechanism for deeper contemplation of issues as they arose and seeking solutions or insights to mediate or mitigate them.

1.2 THE RESEARCH PROBLEM

From my reflective journal, June 07

I have been so lucky and privileged to have worked alongside the group of dedicated regional representatives; working with a totally committed team, bit by bit - chunk by chunk. I will put our achievements into years 2003, 04, 05, 06, so that the progression is transparent. We had progressed from 19 non-compliances to full compliance. The team did it - together.

I want to keep using the approach. I believe in it (A/R).

A formal study would provide interesting results.

... Yes! Managers have embraced and endorsed the research - I'm thrilled.

1.2.1 The things which must be done and why

Generally, Instructors with a medical or allied background and/or with an educational or training background are recruited. Whilst all recruits should have achieved - or be working towards - their Certificate in Adult Teaching, the induction process has to prepare new recruits with varying abilities. "Recruiting right" was the first step, but induction is a critical next step.

The importance of instructor credibility and knowledge was acknowledged by managers. Instructor Induction needed to be both specific to the Instructor's needs, (including teaching or medical training if she/he does not bring prior knowledge), yet also be sufficiently generic to include all information relating to the NZ Red Cross context. Instructor requirements are clearly outlined in the New Zealand Department of Labour - Occupational Safety and Health (OSH) Guidance Notes (2001), the NZQA unit standard requirements and the New Zealand Red Cross Training Quality Management Manual.

Returning customers provide a significant income. This alone is an excellent imperative for the Instructors to get it right most of the time. Producing and delivering courses tailored to the target market are critical for the business. Courses need to be seen to be relevant, accurate, informative, and dynamic, but need also to be pleasant social experiences. Instructors are the "face" of the organisation and teach many thousands of customers annually.

The emphasis on teaching skills was also well accepted. Instructors teach classes of up to 20 adults and classrooms of primary and secondary age children. Several Instructors to whom I spoke informally had said that dealing with nerves and voice projection, were important when they were new to the organisation. Stiven (1997:16) suggests drama as a method of learning which improves confidence, self-awareness, organisation and control, and public speaking abilities. Pyke (1998) also suggests that many teachers would benefit from stagecraft, presentation skills and professional voice projection. Teaching and presentation skills were taught only randomly during induction, and some new recruits are unfamiliar with appropriate techniques.

Quality course delivery is paramount to successful learning. It is essential for return business in much the same way as Andrew Noble, New Zealand Drama School, states for theatre: "*The essence of theatre is the actor and the audience ... but without that audience there is no theatre*" (Wakefield, 1998:47). This critical link between quality of delivery and audience satisfaction supports the NZ Red Cross interest in ensuring effective induction and ongoing training and education for Instructors.

Additionally, managers recognise that employee satisfaction directly influences customer satisfaction, and when training is coupled with experiential learning, the group can ensure that our training team will achieve very positive results and secure growing course numbers.

The strong imperative that instructors receive the kind of training they need to be leaders and ambassadors of the organisation supported the fact that training was needed to promote instructor teaching and assessment skills.

The working group certainly had scope to improve the induction processes. The baseline study provided comprehensive data about appropriate induction processes, and both strengths and weaknesses of the current systems were identified. The feedback helped the group frame this next quality improvement step. Study feedback results for the *overall induction rating* were that just over half (55%) said it was ‘average or above’, 59% said that their induction ‘met their *training needs*’, and only 46% believed the quality of their *induction administration* was “average or above”.

Clear guidelines were identified from the baseline study. The extensive list of suggested changes included the urgent need for a national induction process and that it should be developed with input from senior training staff. New recruit feedback included the following features for instructor induction: *a well defined, comprehensive and nationally utilised product which is run by well qualified staff, with a component of mentoring and guided technical practice prior to “going live”*.

Our knowledge about our target group, the instructors, could be gained from CVs, pre-employment screening and interviews, professional development days, and performance appraisals, and would influence the design. Broadly using Roundtree’s proposed categories, as quoted by Marland (1997:78), the learner data within the Red Cross context can be summarised as follows: adult learners, both male and female, employed as new instructors whose background generally includes a degree of knowledge, skill or practice in emergency care or health and/or education.

New instructors may have teaching or technical skills and experience, but often do not have both, and adult teaching is also a priority within this teaching context. Therefore

most new instructors need be trained to at least meet the minimum requirements (i.e. Unit Standard 4098, CPRL2, Pre-Hospital Emergency Care). Additionally, few new instructors have an in-depth knowledge of NZQA and, for some, English is a second language.

The group had worked together to identify the concepts and values of expert teachers within the Red Cross context. Resulting information identified that priority should be given to enabling self-paced learning while still fostering the feeling of being part of a caring team. Resources would require sign-off to eliminate non-return, and paid time was identified as an important factor. Generally, because new recruits have strong cognitive aptitude, the working group expected that the proposed style of learning would be appropriate.

Initially it was thought a folder format design divided into sections would be appropriate, however - during its development - this evolved into a workbook with specific basic subject and information requirements which facilitated Instructor self-reliance while enabling them to still feel supported, and which could be readily produced in-house to ensure easy and inexpensive updating and printing.

The working group decision was: *To develop a self-learning/self-paced instructor induction workbook which provides a seamless induction process suitable for all New Zealand Red Cross instructors.*

The group contributed fully in designing and implementing the development of the Induction concept and readily discussed and participated in the evaluative action research component in which the effectiveness of using this collaborative process was examined.

The organisation had sought to gain a quality improvement loop by engaging in action research, so the team of nine training managers and coordinators - who usually met quarterly and who had responsibility for implementing quality control in their regions - formed the collaborating group and provided both technical expertise and a working perspective on requirements and practical solutions.

The group planned to work collaboratively at three workshops throughout the year to maximise members' input into solving the induction problem. Notwithstanding the anticipated time required to achieve the goals, a collaborative approach was favoured as it was anticipated that this might increase ownership of the research, mitigate disagreements about the end product and ensure a positive opportunity for nationwide input.

The working group would complete and evaluate at least two full action research cycles (plan, act, observe and reflect). Whilst the working group were able to complete much of the collaborative work in predetermined meeting times, some work (e.g., readings and stakeholder feedback) was expected to be completed in their regions, therefore even though a full time-line for the three resulting cycles was prepared, in practice time frames needed to remain relatively flexible.

In this research - primarily a collaborative action research inquiry - several specifically selected research activities, chosen to facilitate a robust outcome as would be expected in triangulation, were used. As the principal researcher I agreed to both coordinate the research and complete all the writing up and reporting.

In the *evaluative action research*, an action research process was used to evaluate how well the collaborating group approach worked for the development of the induction process and whether or not the approach would be a suitable process in attempting further such projects. After full ethical consent processes had been completed the research plan would be implemented.

The gathered data would be pooled and entered onto computer spreadsheets and workshop group work notes collated, grouped and analysed. All information would be further synthesised by discussion and group work and reported accordingly.

The overall thesis objective would be to report on the evaluation findings of the action research processes. The researcher would evaluate the chosen way of collaborating to solve a problem which would also become the central concern of the evaluative action research process. The need for a realistic resolution to the induction problem provided the group with a compelling incentive for action; while the literature would provide

significant and convincing evidence of probable success and improvement within educational settings.

At the heart of the inquiry lay two central questions. Firstly, can collaborative action research help to both identify the real problem and recommend appropriate, practical and workable solutions for addressing the problem? And secondly, how effective was the collaboration process for the group, how well did it work and did they enjoy it?

Advantageously, underpinning and providing a context for the action research process was a deep commitment by the working group to ensure that the induction processes for our new instructors became nationally consistent and effective. This is particularly important because many work in professional isolation across the country, even when engaged to work within a city environment.

Most group members were already accustomed to working together. Members' willingness to give their agreement to participate in the evaluative action research became the cornerstone for commencing the research.

Planning the research was therefore expected to be relatively straightforward - however, formulating the research question and obtaining ethical consent took longer than expected.

1.2.2 The research question

From my reflective journal, April - May 07

We need to ascertain: What do we need? Or more importantly, what don't we need! We definitely need to focus on evaluating the collaborative development process.

We should aim to enable and cultivate learning for the new staff. The product has to be based on good adult learning theory and be user-friendly. We need to pre-test and trial it before "going live".

Great turnaround support - XYZ said last week that induction was all over the place - and that something needed to be done about it. She spent 15 minutes saying all the reasons why the project was important - why it should go ahead. Fantastic!

Management sign-off is completed, I am so pleased they agree and acknowledge the business benefits of the study.

Through the research question, “*Can action research methods usefully inform the development of a national Instructor Induction process within a PTE?*” I sought to establish an effective induction package using a collaborating working group which would then evaluate the collaborative PAR process for its effectiveness throughout the three action research cycles.

An initial literature and resource review indicated that the chosen research methodology was well suited to this type of educational improvement and I sought to address the broad categories of data which would be gathered to satisfy a process of triangulation and minimise error rates.

The theoretical and technical aspects of the research process included considering the importance of empirical questions, finding the hypothesis, deciding on the research design, content and format (Gummesson, 2000; Johnson, 2008; Kember, 2000). Setting out the research information onto spreadsheets was also considered (Bouma, 2000; Emerson, 1994; Johnson, 2008).

The reviewed literature both supported my belief that pertinent and applicable induction provides the foundation for employee commitment and satisfaction, and also strongly supported the use of action research and action learning for improvement in practice, thus readily providing a way forward.

Through the evaluative research methods I aimed to investigate the validity of my “theory in action”, where I suggested that by engaging in action research processes, a large humanitarian organisation such as New Zealand Red Cross could successfully develop an effective Instructor induction process which would enhance quality improvement. By also seeking or identifying what is not supported by the data the collaborating group could also then gain a basis for appropriate and effective professional development.

In addressing the research question I started the research with three assumptions:

- Firstly, that all people involved participated in the best interests of the New Zealand Red Cross and its future instructors.

- Secondly, that the action research approach would work well within the New Zealand Red Cross context considering its regional management structures.
- Thirdly, that whilst the action research literature related to successful use in a variety of community, business and educational institutions, I made an assumption that the action research approach would work equally well within a large organisation where the collaborating group have multiple portfolios.

Identifying and mitigating any constraints to the research was also seen as vital to the successful outcomes of the research. I identified six as indicated in Table 1.1 below and mitigated these by addressing or working around them as far as possible.

Table 1.1: Constraints and Mitigation Procedures

Constraint:	Mitigated by:
1. A very limited budget for both the development and subsequent implementation of the proposed and recommended changes, in particular for any printing, distribution and implementation costs. Positive support from the training management team solved this initial problem.	<ul style="list-style-type: none"> • using allocated time at prescheduled meetings • identifying and agreeing to expected costs • being aware of the cost factors during decision making.
2. Current regional process variations	<ul style="list-style-type: none"> • fostering common understanding by facilitation and discussion
3. Fewer than quarterly regional representative meetings	<ul style="list-style-type: none"> • dedicating as much of these meetings as possible to the action research
4. Willingness of participants to contribute honestly	<ul style="list-style-type: none"> • commencing with ethical processes: privacy and anonymity clauses in the Agreement • deliberately engaging in, and building on, trust amongst the group
5. Group members being geographically separated	<ul style="list-style-type: none"> • maintaining regular email updates and phone communication • copying all members into communications • disseminating workshop and group work notes
6. Neither the training managers/coordinators nor the instructors had any direct responsibility to the Manager Quality Assurance, Training (myself, i.e. principal researcher) or my manager. Unmitigated this had the potential to stall the research.	<ul style="list-style-type: none"> • communicating with managers of the working group • involving regional training managers • keeping people informed • maintaining close liaison with the working group.

Compounding the constraints issues were the uncertainty and unpredictability of the action research process and subsequent results, which had the potential to have left individuals feeling exposed or threatened, or even the group feeling that they had failed.

It was hoped that collaborative enquiry would mitigate any feeling of division by ensuring national consistency and providing an opportunity for nationwide input and learning.

I took the view that all improvement involves “learning” and the collaborative action research framework, wherein people would cooperate to solve their identified problems, seemed to be an excellent tool for learning within organisations. I hoped that the collaborative workshops would provide group members with positive learning which they would share in their local environments resulting in organisational learning. If the participating group members experienced helpful and constructive values by cooperating in this manner, then implementation of similar processes within their regions would be possible.

I also acknowledged that people within the organisation, as well as those in charge of managing it, both actively participated and actively moderated it. Their influence was therefore vital to the success and outcomes of this research.

The final limitation was that collaborative and consultative decision making processes, which were to be the hallmarks of the planned research, are - by their very nature - time consuming.

1.2.3 Justification for project and research question

Improvement was at the heart of the research initiative and inductee satisfaction its “guiding light”. Instructor employment satisfaction is critical to the financial success of the organisation, and questions about inconsistencies in induction practices and levels of best practice had begun to be raised at training managers’ meetings.

The business imperatives behind the research were increased staff satisfaction (with its link to productivity) and teaching and technical consistency. Harvey suggests that many employers have an attitude which is “narrowly geared to the immediate task and tied to higher levels” (2007:20) however he also suggests that: “The skills of people at work are widely regarded as major contributors to productivity performance” (ibid.). Harvey’s premise that maximum gains are made if skills are organised and used appropriately within the work environment, is highly relevant in the Red Cross context

because new instructors are expected to perform their role fully and effectively, often within a professionally isolated situation, as soon as they teach alone.

Further justification for the research included that, whilst there was substantial information available about action research processes used in many and varied settings, there appeared to be little information of other such action research projects having been undertaken by an organisation whose primary focus is humanitarian activities. Therefore the results will be useful to add to the body of knowledge on the subject.

1.3 OUTLINE OF THESIS

In Chapter One the New Zealand Red Cross context for the research - including the strategic imperative for it - is outlined, and the research problem, research question and justification for the research are summarised. Three identified assumptions are acknowledged, and constraints to the research are listed together with the ways these were mitigated.

In Chapter Two the purpose of the literature review is outlined and the information is reviewed. "Reflective practice" is defined and ways in which practice can affect process evaluation are discussed. How action research can develop and assist with designing appropriate learning packages is examined; and finally the evaluation of action research is defined and discussed. Theoretical constructs which provide the justification for the action research methodology are considered. The contributions of authors of relevance are examined, and the foundation for the decision that the working group would use action research to develop the instructor induction process and would evaluate how this worked for them is provided.

Chapter Three includes the methodology in which the field of the evaluation and the action research evaluating processes are described. Triangulation and validation options are also outlined. The methods used for the data gathering from, for example, the meetings, the A/R phases and other sources such as the questionnaire, are outlined. The results of the data collection are analysed and interpreted, and how this information was used is outlined. Potential conflict of interest issues, particularly relating to researching my own team, are discussed and an outline is given of how this was addressed. Confidentiality and privacy are outlined, ethical considerations are

comprehensively covered, and the Massey University ethics approval process is described.

In Chapter Four what was found to answer the research question is presented chronologically from the gathered data from each of the working group meetings, including data from the phases and other sources.

In Chapter Five the emerging themes resulting from the data are identified and analysed. This chapter includes statements which summarise the data and makes links between the themes and supporting literature to validate the meaning taken from the data.

In Chapter Six the research findings, outcomes and recommendations arising from the research problem are presented, and the limitations of the research are identified. The implications for further understanding of action research and research questions are also discussed, and the chapter finishes with a section of personal reflection.

An Afterword is included to briefly outline of the results of the *participatory action research* methods which were used to develop the instructor induction process. Whilst it is not the intension in this report to fully illustrate details of the PAR because its focus is the evaluative action research, the interconnected relationship between these two processes was an important aspect in this research.

The report layout includes *personal reflective journal quotations* which illustrate issues, support triangulation or argue specific points and which are included in identified boxes; and the *evaluative action research*, in which how well the PAR processes worked in solving the collaborating group's identified "problem" is evaluated.

The evaluative action research results offer an insight into the effectiveness of the methods as experienced by the collaborating group (New Zealand Red Cross training managers and coordinators) as they developed their national induction package using *participatory action research* (PAR) methods.

CHAPTER 2

LITERATURE REVIEW

2.1 PURPOSE OF THE LITERATURE SEARCH

From my reflective journal, June 07

What a wealth of information available for all. I will start with a broad approach initially, and then narrow into the main subject headings.

I feel privileged that I have been given the knowledge ... the gems ... of other writers, their help, assistance, guidance, mentoring, and access to enabled academic know-how.

All this is an honour to be able to tap into the collective wisdom, we are very lucky indeed.

It is all there for Red Cross as a whole to gain from.

The purpose of the Literature Review was twofold. Firstly, to provide a sound theoretical underpinning for the research and to gain a broad appreciation and understanding of others' work so I could evaluate my "theory in action", which was, that by engaging in action research processes a PTE can enjoy quality improvement?

Secondly, to gain an understanding and an appreciation of how action research had already been used (particularly its successes when applied within educational settings), and to identify important operational criteria. A working knowledge of action research methods was required if the aim of the research was to be achieved.

A collaborative action research approach was planned to help solve a national issue of inconsistent instructor induction processes and this way of working would then be evaluated for its effectiveness by the working group who had themselves been actively involved in it.

The research question, "Can Action Research methods usefully inform the development of a national Instructor Induction process within a PTE?" provided the underlying framework for the literature reviewed. Primarily, prior to embarking on the research, it

was important to understand what others had said and done when faced with similar problems, and to consider the different messages available in the literature reviewed.

The review focus included designing learning packages suitable for training and professional development purposes; key theoretical influences, research paradigms and methods relating to collaborative action research enquiry and action learning and reflective practice.

In seeking an appropriate methodology for assisting the New Zealand Red Cross with determining the steps for an improvement loop, action research became increasingly apparent as an appropriate answer. Early reading suggested that there is good support for believing that a project such as this, in which action research was used to seek improvement in practice, would succeed and would stimulate improvement (Kolb, 1984; Pedler, 1997; Weinsten, 1995; Zuber-Skerritt, 1992a).

Business models offered some practical assistance also, however through collaboration and cooperation, action research offered a practical approach to find and address the facts and solve problems with a view to improvement. The research techniques used needed to be ethical, systematic, responsive to the given situation and provide increased knowledge and understanding of the related issues. An essentially attractive ingredient was the action research qualities of being adaptive and able to evolve. The flexibility to proactively intervene in practice to make changes and improvements within specific contexts was favoured.

When considering the research methods further, another helpful element was the ability of the principal researcher to be directly involved. This would provide the working group with the opportunity for facilitated workshopping using an in-depth academic approach which promised to be both informative and insightful.

Besides the principal researcher's input, the direct involvement of the training team would potentially provide a more accurate picture of what was going on and how the group could progress in resolving the concerns. The participative notion contained within the action research framework promised to enable ongoing insights, multi-dimensional information gathering and the taking into account of different perspectives.

It was therefore anticipated that results would more accurately reflect what was actually happening and how to resolve problems.

The aims in the literature review were to verify the appropriateness, applicability and user-friendliness of the research methods relating specifically to the induction development, and to identify the strengths, weaknesses, and any gaps. The purpose of this review is to articulate the findings. The degree of success of this research is likely to directly influence the use of action research for meeting further developmental requirements within the organisation including, for example, ongoing curricula development or assessment and moderation processes used. Once completed, this research will also provide information about action research application within the context of a national society.

2.2 PROCESS EVALUATION USING REFLECTIVE PRACTICE

From my reflective journal, July 07

Entries into my reflective journal are proving very useful indeed – personal notes; considering ideas, views and further implications; creating diagrammatic concepts; brainstorming & mind mapping; questioning status quo and looking forward.

Cranton has taught me a lot today.

Notes re “Authenticity”

- know/understand the collective***
- know how we differ or are the same***
- be bold, dare to risk***
- know you can't always win others over***
- have a good sense of self in the classroom.***

Important attributes include:

- caring for the students***
- helping them learn***
- discuss and enter into dialogue***
- communication***
- sharing self with students.***

My reflection relates to a conscious approach towards authenticity. In this case whilst I am the “student” within the research context, I am also a facilitator and take leadership steps within the research process.

I have reflected deeply on the concept of authenticity in this respect. My decision is to remain honestly and spontaneously authentic – to be who I am but with a new layer of conscious objective facilitation at all times.

The benefits of reflective practice within learning contexts, including professional development and problem solving, are discussed by many writers (Cranton, 1996; Eraut, 1994; Knowles, Holton III and Swanson, 2005; Marland, 1997; Moon, 1999; Zuber-Skerritt, 1992a).

Pope & Denicol, propose that action research encourages the development of theory within a context, rather than adapting another person's theory, and therefore it shares with personal construct psychologists the idea that increased learning takes place when the people are active agents, and that growth occurs with reflection (1991:102).

In a similar vein to Pope & Denicol, Cranton (1996) describes research paradigms as *quantitative* (scientific, reproducible, mathematical) and *qualitative* (people, process and situational) and adds *critical research* stating that primarily critical reflection is described as being of human interest (to reflect on ourselves, our history, knowledge and social roles) and thereby humans learn, change and develop. This is a deliberate and rational process where current thinking and practice are "tested in evidence". It is the resulting transformative learning which is ultimately the focus of such research.

Cranton also argues that in professional development the central process in transformative learning is *critical reflection* and that critical reflection is highlighted in most educational contexts.

Zuber-Skerritt (1992a) views education as the way people learn, and assessing the way they have learned. Levels of learning can range from the learning of factual knowledge, where the focus is more on what people say, or how they apply or reproduce the learning; to learning at a deeper level of meaning, when the person relates the learning to his/her existing knowledge, transfers it into new understandings and is able to utilise it for problem-solving and to enhance experience.

Zuber-Skerritt (1992a) provides examples of activities such as sharing and talking with others, participating in the problem-solving process, actual experiences and reflection all help to advance and integrate learning from a primary level into this deeper (secondary) level.

When applied to professional development, the action research cycles - plan/act/observe/reflect - allow for these deeper changes to be made. If this secondary level of learning is fostered, advancements can occur through improvements such as in critical attitude and approach, being able to research a teaching context and enabling a self-evaluation process to occur. The deeper level gained through an action research approach promotes accountability and increasing professionalism which foster improvement in teaching and learning.

The process of articulation, and shared meaning and learning during professional development days are thought to increase competence - for example, in technical knowledge or classroom management.

Moon (1999) believes that reflective practice promotes increased self-awareness as well as the noticing and acknowledgement of others' cues and ideas. Moon describes reflective practice as being largely a subjective practice and suggests that when practised in the professions generally related to nursing and teaching the results give status and increasing comfort.

Eraut (1994) considers the concept of *expertise* as being able to be measured by what was achieved or how well something was done, however, he also comments that this view of expertise is appropriate for engineers but not necessarily for nurses or teachers where, as Moon suggests, often creativity and reframing problems increased the practitioner's expertise

In considering the importance of reflection for sorting out issues, Eraut suggests that people are naturally reflective about things that are not normal or when they feel uneasy or uncomfortable, and that reflection often occurs during a period of calm such as at the end of the day or end of a course. However, he believes also that sometimes reflection does not occur at all and important cues may be missed if people are busy or if more time is spent one-on-one at the expense of the group.

Reflection can occur at any time, formally and informally. Experienced teaching staff are more able to deal reflectively with situations as they arise. In discussing Schon's work on the 'reflective practitioner', Eraut differentiated between *Reflection-in-action*

(which is described as a rapid recognition of a problem and involves solving it there and then - while 'in action') and *Reflection-on-action* (which involves critically thinking about something after it has occurred and sorting out how to deal with it or how it might affect the future). *Reflection-in-action* is proposed as being more difficult for new teaching staff; however *reflection-on-action* can be consciously and deliberately completed to good effect.

According to Eraut, disruption or disturbances to reflective practice commonly occur. Fatigue and a person's private life can influence practice, and whilst deliberation is often time-dependent, it can also be geographically dependent.

Therefore both professional development and distance learning benefit from reflective practice being systematically built in, and it can be readily applied in such areas as reviewing learning activities, developing intuitive processes, considering assessment and completing evaluation.

Building reflective practice into a training session or meeting structure is also beneficial. For example, Knowles et al. (2005) use reflection questions at the end of each chapter of their book, providing a useful revision option and also encouraging the readers to apply the information within their own thinking and context.

Similarly, to actively foster reflective practice Marland (1997) includes an 'invitation to reflect' throughout his book thus providing readers (and teachers) with a pathway to critically reflect on their own ideas and performance.

Critical reflection occurs within specific contexts and therefore outcomes are dependent on the thoughts and reflection processes of those involved, that is, the context within which the reflection takes place influences the way people will learn from the reflection. It is interesting to consider the influences of culture on the specific reflective or learning context because the way people learn is also influenced by their culture or the culture in which they live (Lacy, 2002).

Cultural groups tend to have dominant learning style(s) within their cultures. Hess quotes David S. and Kathleen R. Hoopes as follows to define culture:

Culture is the sum total of ways of living, including values, beliefs, ascetic standards, linguistic expression, patterns of thinking, behavioural norms, and styles of communication which a group of people have developed to assure its survival in a particular physical and human environment. (1994:4)

As people interact and respond, the culture can change or adapt to the needs of its members.

Reflective practice results will echo both the socio-cultural context within which it occurs and also the people who actively engage in it. Everyone both has and makes his/her culture/s and in this way people both are influenced by, and influence, their culture/s.

Cultural changes occur in response to human interactions, innovation, and experience, and therefore culture is subject to a continually changing process. By its very nature, culture (a collective way of doing and thinking) is not static; whenever people meet and have a shared understanding they will form a culture, therefore change or improvement result.

Reflective practice, according to Brookfield (1995), is about specific groups thinking and talking about things “in the cold light of day”, whereby making assumptions and questioning them, along with identifying the good parts, the not-so-good parts and what change can be helpful to influence positive change.

Group members within any given context, who are prepared to think about what is needed and to question the status quo, and who then take time to change accepted practice are what ensures improvements.

I anticipated that, because reflection-in-action is an essential component of action research and important for adult learning, the New Zealand Red Cross and the working group, through reflection-in-action, would see changes and improvements in practice.

2.3 DESIGNING LEARNING PACKAGES USING ACTION RESEARCH

From my reflective journal, July 07

How does a team learn? If as a group we keep doing what we do now, we will stay in the same place as before. But movement is not always comfortable, and maybe there will be hiccups to solve en route.

The homework readings were very well received and will help form a good foundation; the group feedback worked really well as each shared their learning and discussed how this was relevant (or not) to our problem.

They provided good professional development for members, because few of the group study voluntarily or officially engage in academic papers.

Action flow might go something like: informed; agree to change; sift material; evidence based thinking; conceptualised; try; define; new direction; experiential.

The reviewed literature indicated that action research and action learning processes stimulate improvement in educational and organisational settings (Kember, 2000; Kolb, 1984; Pedler, 1997; Weinsten, 1995; Zuber-Skerritt, 1992a).

Action research is described as having its own characteristics and is an approach whereby rationales are tested in practice by a research group. The individual's language and actions are framed in that specific social context or environment, and changes occur within that given historical and cultural milieu (Kemmis & McTaggart, 1988). Kemmis & McTaggart define action research as:

“a form of collective, self-reflective inquiry undertaken by participants in social situations in order to improve the rationality and justice of their own social or educational practices, as well as their understanding of these practices and the situations in which these practices are carried out”. (1988:5).

The term *action research* is used to describe a myriad of activities. Use of its practical cooperative approach enables the finding of facts and solving of problems with a view to improving a given social situation.

Burns (1997) suggests that primarily the action researcher aims to investigate and improve a given situation in a subjective, collaborative, cooperative, self evaluating way, using information from within the given situation.

Burns uses the word *process* to describe action research: “a total process in which a problem situation is diagnosed, remedial action planned and implemented, and audits effects monitored” (1997:346).

The action research cyclic model (Figure 2.1) has its origins in the work of Kurt Lewin and is depicted as follows (Burke, 1996:50):

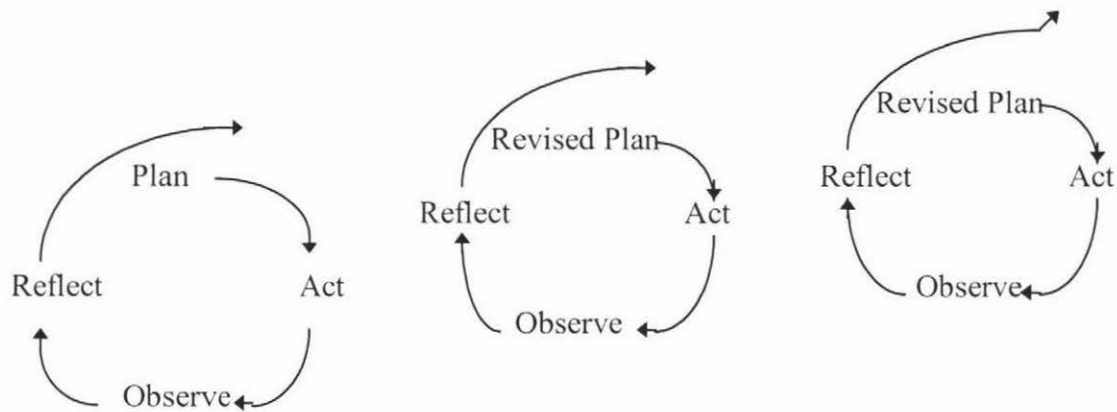


Figure 2.1: The Action Research Cycle

The action research process is mostly depicted as cycles, however Kemmis (2001) suggests that the stages can change or overlap as they are influenced by evolving plans. Atweh, Kemmis & Weeks (1998:21) agree that: “In reality the process is likely to be more fluid, open and responsive”.

Action research, through the people exploring and considering their practices, facilitates improvement. When used in health and education, successful examples have solved practical problems. Often the changes can have far reaching effects.

The tools of action research include anecdotal records, field notes, document analysis, journals and diaries, portfolios of newspaper clippings, minutes, correspondence questionnaires, interviews and discussions, sociometry, documentary evidence and analysis, slide tape photography, case studies, ecological behavioural descriptions (mood/feeling), logs, sampling cards, tests, flow charts, multimedia equipment such as audiotape recorders and videotape recorders (Atweh et al., 1998; Carr, 1996; Kemmis & McTaggart, 1988; McNiff, 2001).

Appropriate research tools are selected according to the needs of the specific research context and are particularly useful when the methods used come from multiple perspectives because the data can then assist with triangulation.

Although quantitative methods can also be used in action research, it is open to the unexpected and discoveries and improvements are made within a given human context, as opposed to quantitative research in which the aim is to establish new generalisations, observed uniformities, and proof of scientific laws using reliable data and logical analysis which provide reproducible results.

However, unlike quantitative research, the action research approach leaves the practice and results open to the unfolding of events as it embraces the specific contextual complexities. In this way the researcher's approach usually reflects and incorporates his/her values, beliefs and politics (Brookfield, 1995; Cranton, 1996; Reason & Bradbury, 2001).

Grounded in the researcher's own experience, action research is validated by the process of exploration of the specific question and improvements are made as the whole action research group learns from their own experiences and critical reflection (Cranton, 1996). The implications of socio-cultural constructs for outcomes as they relate to evaluating action research processes will be discussed later.

Action research is described by Johnson (2008:215) as being used by teachers engaging in "systematic and orderly" observation and investigation of practice with a view to finding a solution to an educational concern. The move to improve educational practice using action research methods appears to be expanding (Eisenhart, 2001). Numerous examples of successful practice within a variety of contexts are found in the literature.

The emergent practice of participatory action research worldview shows a diversity of application which, whilst challenging the current modernism paradigm, has also become attractive because of its applicability to organisational, educational and social inquiry alike.

Borda demonstrates how resolution of situations is achieved by social justice “because {participatory action research} P(A)R necessarily involves democratization” (2001:33). Building from the bottom up empowers those involved to explore appropriate actions to find resolutions for their issues. According to Borda, P(A)R is therefore liberating and within the current milieu critical intellectuals who favour societies with open pluralist values see positive results for social advances and human environments. Examples of the applications are given including “in communities and cities, families, enterprises, churches, art and communication media, universities and colleges” (2001:34).

Others suggest that participatory action research methods are useful and found around the globe (Hall, 2001) and include projects conducted with universities and school settings as well as for professional development. In each research context, through collaborating partnerships action research is managed according to researchers’ specific needs.

Participatory action research is defined by McTaggart (1989) as being “an approach to improving social practice by changing it and learning from the consequences of change”. Collaboration and “authentic participation” are used through which “reasoned justification” can create “a developed, tested and critically examined rationale” for change. The collaborating group works democratically to solve their identified issue (Borda, 2001; Hall, 2001).

Utilising participatory action research for the development of an induction programme required a review of literature on adult learning and professional development processes. In discussing teaching expertise Knox (1986:41) suggests that teachers of adults need a high-level of subject or content knowledge to enable them to focus more on such things as the subject or teaching complexities, interpersonal relationships, answering or clarifying fundamental questions, providing good role expertise and enabling responsiveness and flexibility.

Marland also argues that good practice is gained through experientially based knowledge even in the distance learning context. He discusses ways to get to know what motivates and interests the students so that you reflect on “... the kinds of knowledge you need about learners in order to make appropriate decisions regarding the

design of distance teaching materials for the particular context in which you teach.” (1997:78).

Knowing who your learners are helps target teaching perspectives. In their model “Andragogy in practice” Knowles et al. (2005:149) propose key aspects which could influence practice. The framework presents three interacting dimensions within a model “... that recognises the lack of homogeneity among learners and learning situations, and illustrates that the learning transaction is a multifaceted activity.” (ibid., p.148). The innermost dimension, namely *Andragogy: Core Adult Learning Principles*, focuses on aspects of the learner including his/her readiness to know and learn, his/her self-concept, prior experience and orientation and motivation for learning.

Experience can, however, positively and/or negatively influence a person's response to an educational experience, and therefore influence the learning experience and outcome. Meaning can be drawn from experience and a habitual manner, fear of change thus precluding the opportunity of new learning.

Whilst Postmodernists questions the limits of current andragogical thinking, particularly with regard to the power dynamics and influences of race, class and gender (Kilgore, 2001; Merriam & Caffarella, 1999) action learning remains a very powerful concept in which it is acknowledged that past experiences actively shape one's abilities. Lacy (2002) argues the importance of seeing the learner from a holistic viewpoint and provides tools to assist the reader with considering and adopting inter-connected learning practice which meets their specific learning needs.

Today the informal learning we glean from our daily experience is differentiated from *experiential learning*. Usher, Bryant and Johnson, define this learning as “a particular set of ideas about how best to facilitate learning from experience” (1997:169) which may include any experience which facilitates learning such as having students actively involved in their learning, using action methods, activities and group work, or using examples from the learners' social, work and domestic life experiences, and drawing on past experiences.

Pedler (1997) suggests other words such as *team learning*, *learning community*, or *situated learning* as possible alternatives to action learning, where people share ideas and work on real problems with their colleagues and help each other to achieve change. Pedler describes one interpretation of action learning as *changing the external world*. Others include *self-development* and *collaborative enquiry* (people achieving together).

Well educated and highly qualified teachers do not necessarily guarantee excellence in teaching. Dunkin (1995) suggests that subject specialists and subject enthusiasts often make the best teachers and that good teachers arouse enthusiasm for the subject, establish warmth and mutual and respectful relationships with students and provide accurate and helpful information about the quality of the students' work. Expert teachers, according to Dunkin, are more able to respond effectively and in more depth than novice teachers. In other words, practice in the classroom increases teachers' skills.

Accomplished teachers work with individual learner needs and preferences. For example, personal learning styles, if acknowledged, can enhance learning. Honey & Mumford (1992) outline several different styles including: the *activists* who like to "have a go"; *reflectors* who like to research and review, compare and analyse; *those liking theories or facts*; and the *pragmatists* who want to get on with the job.

Managers, who themselves have their learning preferences, can provide for more rounded learning opportunities if they think broadly about a variety of learning experiences which may address different individual needs.

Workers and managers alike benefit from appropriate learning opportunities. Clementson & Bradford, state that "performance at work now drives curriculum planning and programmes of professional education" (1996:249).

Repeatedly, quality is indicated as a primary factor for the survival and development of workplaces. Many acknowledge the organisational benefits of early and ongoing professional development. Meighan (2000) suggested that staff commitment, loyalty and allegiance are substantially increased with good induction processes.

Repeat business is an important revenue source for New Zealand Red Cross, and therefore it is likely that participant satisfaction will be directly linked to the company's sustainability and growth. Whilst New Zealand Red Cross is primarily a humanitarian organisation its management is still driven by good business sense and its training sustainability must still be measured and protected.

Quality, which is a critical component of business success, can be significantly improved by "front end" commitment to staff induction. Professional development processes are important to ensure consistent delivery of quality teaching and learning experiences and also to encourage staff commitment to the organisation and increased staff cohesion.

Evidence of praxis change within induction is an important element of the research. The literature confirmed that it was likely that by utilising action research processes the working group is likely to secure robust and enduring changes to staff induction. Ideally, changes would be seen both on a microscopic level (the instructor's individual induction experience and learning) and at a macro level (through regional and national responsibilities for new employees).

2.4 ACTION RESEARCH PROCESSES AND EVALUATION

From my reflective journal, July 07

The literature review provided me with a snapshot of wisdom and offerings and I feel privileged to have gained from the 'artists' I have had the pleasure of 'touching' during the research process.

Inductive (let the data show the way) versus conductive (prescribe the results, lead the way, predicted). Decided not to pre-empt what we are looking for, or predetermine action. The group will decide the way forward.

Converge others' experiences to common ground. Our personal way is not necessarily the right way. But if we can sift through other paradigms we stimulate change in each other's worldviews.

Much adult learning is from experience - experiences teach/speak for themselves. Some learners conceal their knowledge (may feel threatened). Individual learner's knowing comes from:

Settings/milieu

*Historical
Cultural
Ethnic
Class
Economic
Political*

Multiple Identities

Uniqueness

*Family identity
Social identity
Gender identity
Spiritual identity
Racial identity
Class identity*

Evaluation of action research processes is enhanced by a process of triangulation. Triangulation is the process of using many “different sources, methods, and perspectives to corroborate, elaborate, or illuminate the research problem” (Stringer & Dwyer, 2005:49). Where several different sources or segments of data merge to show similarities or patterns, there is a higher likelihood of the resulting information being indicative. Similarly, if the information is divergent then this is equally important and noteworthy. Information from both qualitative and quantitative research can be used to provide data for evaluations.

According to Bloom’s Taxonomy (cited in Johnson, 2008:56) thinking at an evaluative level, evaluation “uses a given criterion to determine the value of a thing of quality of a product or performance” and, amongst others, examples of words used to describe the evaluation include “appraise, criticize, compare and contrast, discriminate ... rank, grade, test, measure, recommend ...” Given the multifaceted nature of educational contexts, it is appropriate for evaluation processes to be responsive to the given situation and particularly for those involved in action research processes.

Johnson cautions against stipulating behaviours as standard best practice in educational research, because he believes that often specifically compiled lists cannot adequately address complex situations such as teaching. Rather, he recommends that educational research *describe* effective practice, not *prescribe* it.

Zuber-Skerritt (1992a), suggests that the action research paradigm can be viewed as a technique, a philosophy, a methodology and a theory of learning. Action research can be used, both broadly within organisations for change management, training development, strategic planning and production improvement (ibid.). Robust evaluation is necessarily a part of this paradigm. Within educational organisations, action research can be used to solve problems in specific contexts, to facilitate in-service education and professional development, to offer multiple approaches to teaching and learning, to enhance communication, relations, morale, personnel relationships, and to facilitate job analysis.

The notion that action research is done by and for the people or community concerned is echoed by many writers (Gustavsen, 2001; Reason & Bradbury, 2001). Along with other qualitative research methods, the aim in action research is to interpret the world using the meanings and values of the people involved (Denzin & Lincoln, 2000).

The grassroots approach to solving problems using action research can be used to improve quality and increase satisfaction within an organisation and also, through its democratic process and collective capacity to shape outcomes, can result in political transformation (Burns, 1997).

The importance of the local context within which action research is completed cannot be overemphasised. Stringer (1996) also discusses the importance of cooperativeness in the interests of both values and standards of study outcomes, especially in community-based action research projects, where cooperation is the hallmark to finding acceptable and workable solutions to various social problems.

Stringer's handbook provides step-by-step instructions for a variety of educational, health and social applications, for both lay and professional workers, providing examples where action research has revealed practical, effective and sustainable solutions to specific and deep-rooted problems simply by actively engaging those involved in the research process.

Stringer's examples of participatory approaches within the commercial and business world are reassuring, as many companies experience positive outcomes as they seek to more fully understand the complexities of their social worlds with the aim of providing benefits for the participants. Stringer suggests that important values include that the research is a “democratic, empowering and humanizing approach to inquiry” using an “explicit set of social values” (ibid., p. 9).

Action research therefore is a movement away from the constraints of a controlled technical or bureaucratic environment and provides an inclusive and sensitive listening environment which fosters a positive social atmosphere in the work environment. As Stringer states: “It is a movement away from competitive, power-driven, conflict

ridden organisational processes toward more cooperative consensual ways of living.” (ibid., p. 160).

The emphasis on a *democratic* process where everyone’s input is valued and respected and where information and data is collected, reflected upon and action is taken to resolve the issues is enabling and, as Stringer puts it, is *liberating* and *life enhancing*. (ibid., p. 10).

Support for the use of democratic inquiry was convincing, so I underscored my research plan (which needed to help the group find solutions to current induction problems) with an emphasis on social development and positive, cooperative and enabling working relationships in which people are sensitive to others’ feelings. This differed from the commonly used hierarchical or authoritarian management styles in which control and superiority are assumed and in which mandates are stipulated and imposed.

It is interesting that in an earlier study by Greiner (1973), managers generally agreed that some characteristics of participative leadership produced effective results. However, they also agreed that it “appeared to be a sound concept, but only if presented as a general model within which individual leaders can exhibit a variety of actions to satisfy different personal and career needs” (ibid., p. 117).

In a later paper by Haslett et al. (2002) the strategic worth of using action research within a business environment is outlined. Monash University PhD students participating in the study reported many positive links between the action research process within their organisations and their personal learning, including the value of academic support - especially working within what they describe as “a world where the past (and research in particular) is only valued to the extent that it relates to an action-oriented future” (ibid., p. 446). The action-based research methods needed to stand up to academic scrutiny as the results would influence future use of the methodology within the university. The students, who “argued the high strategic importance of AR for business faculties” (ibid., p. 447) also discussed a desire to establish further learning support for similar business related action research studies.

The potentially far-reaching claims about action research are founded on evaluation processes of previous work. Tailoring the evaluative approach to a given situation, particularly when integrated with robust and transparent evaluative measures, provides context-specific results.

In each research context, through their collaborating partnerships researchers managed their action research according to their specific needs. Reliably conducting and evaluating research results and outcomes remain critically important, not only to provide a convincing argument for academic credibility, but also to provide a robust, stable methodological approach to the processes used by those seeking improvement within the local context.

Providing a mechanism to address and respond to each particular contextual situation gives action research its strength, but as Kemmis & McTaggart (1988) suggest, as the process is responsive to the various participators' needs, it invariably results in changes. Unlike quantitative research, in which reliability of results is expected, these often unexpected or unforeseen changes can add to the perceived lack of transferability characteristic of action research process results.

From a business perspective, positive results are a priority. Action research provides the intellectual basis for finding practical solutions and effective results.

Senge and Scharmer (2001:240) see action research as disciplined research which aims to share what is learned and provides for individual and group capacity building, where people cooperate to achieve workable outcomes. In this respect solutions are not necessarily finite or predictable, but rather are relative to the specific context.

Collaborative enquiry (Pedler, 1997) assists people to achieve their goals as they work as a team within a given situation. Sharing and working together to solve problems assists individual development and solves specific human issues.

Historically the concept of cooperating is not new. However, Reason & Bradbury (2001) present numerous historical and global links to a variety of participative inquiry

perspectives aimed at equally differing end points. For example, perspectives cited related to areas such as social democracy and organisational change; others to theology, secular and spiritual issues or to race or gender concerns; others related to practical concerns on a very local level (such as local fisheries or animal husbandry) or to solving practical global concerns such as Freire's work on education and the oppressed (Freire, 1972).

This interpretivist orientation provides a useful paradigm to consider because it is an acknowledgement that humans experience reality from their own perspective. In this epistemology, the socio-cultural construction between groups of people, both in the gaining of knowledge and in making sense of the dialogue and activity, is seen as influential.

The importance of dialogue and relationships is emphasised in action research, where the democratic approach stimulates an interdependency or mutual influence to solve problems in practice, be they within the work organisation, research or social systems.

Gustavsen emphasised essential ingredients for successful outcomes which include a focus on a mediating approach, dialogue and equality for all participants and states “{because} unless people can relate in a democratic way to each other, no new ideas, no just causes, or indeed any science, be it social or other, is possible.” (2001:25).

Interpretivist ontology suggests that in analysing any human situations there is no correct or finite perception, but rather, people create and interpret their social worlds (Neuman & Kreuger, 2003). In the subjective world of both the observed and the observer, people understand their own lived experience, so interpretivist methods are necessarily participatory, collaborative and aim to construct new understandings of how others see the world (ibid.).

Weaknesses include such things as the lack of transferable reliability because action research relates to a specific context (although all research, including *traditional*, occurs within a specific context with unique applications); the influence exerted by participants; the need for top management support; that it is written into a descriptive

narrative (which is also an advantage for other teachers to read); it may be long term; and the results may never be published (Zuber-Skerritt, 1992a).

Reason and Bradbury describe action research in a postmodern context as “systematic, holistic, relational, feminine, experiential, but its defining characteristic is that it is participatory.” (2001:6). Whilst also subjective the aim in the democratic process is to develop a knowing; to act and reflect, to theorise and work together to find practical solutions to concerns to enable people to thrive.

Evaluative Action research is described by Wadsworth as doing research “with the focus or emphasis on finding out what *value* people place on things” (1997:10). Identifying what people think and why, enables consideration and activation of their preferred way forward. Planning, documenting and being responsive to the value the specific group places on things and understanding why assists them with ways to proceed.

One of the strengths of action research is its flexibility of use to systematically and collaboratively solve a given problem. Paradoxically however, because action research evaluation is dependent on the raw material gathered within a specific context, it is at risk of becoming subjective - yet to ensure academic and business credibility it needs to have a sound objective foundation.

Triangulation of data enhances evaluative reliability and assists validity by utilising a variety of data sources which are compared, contrasted and analysed to facilitate robust results. In triangulation the people who matter “test” the evaluation to ascertain the degree of alignment, complementation or at least to discuss how the data “illuminate” each other. In the absence of other controls, triangulation will maximise feedback reliability and resulting project outcomes.

Triangulation data sources in this evaluative action research include the literature, reflective journal, feedback discussions from three meetings, and a questionnaire.

A strong evaluative process, with a well reasoned and documented approach, will be helpful in assisting others and will also provide ideas as to how research might be improved in the future.

No literature was found directly relating to the application of action research concepts within a large humanitarian national society such as New Zealand Red Cross, where training forms only part of the business. However, the literature supported the use of action research methods to help resolve the induction training problem. The aim in the evaluative action research processes is to document how well the methods worked within this context.

CHAPTER 3

METHODOLOGY

3.1 METHODOLOGY

From my reflective journal, Sept 07

"Activity is the only road to knowledge" George Bernard Shaw.

Strengths and weaknesses can be found in all research paradigms, and whilst I have indicated some slight changes as described above, this very point also constitutes a strength of the process.

Action research is adaptive, tentative, and evolutionary; it is open to the unexpected and those involved make discoveries and improvements in their given context. A/R encourages group interpretation and understanding where individuals are able to hear others' points of view and contribute positively to these. The A/R approach enables those participating to be responsive and therefore adapt to the unfolding of events as well as to embrace the specific contextual complexities. The research context additionally allows for the participants to reflect their values, beliefs and politics.

I therefore felt encouraged to be open to group needs and to apply and 'massage' the action research cycles to fit our needs, for example the group continued to 'plan' and 'evaluate' our actions whilst in the 'act' and 'observe' phases of the cycle; our work seemed to "slide" around within the A/R cycles. I asked the working group to write down what they knew about A/R; their knowledge was very limited - they will learn by participating in it.

People learn by doing - experiential learning. The message that active participation is the best way to learn, is enduring! The collaborating group members will learn by participating in the action research, and I look forward to hearing about that.

John Dewey, Kurt Lewin and Jean Piaget are the 'intellectual originators' of the enduring experiential learning theory, where experience is seen as important for knowledge generation. Experience-based education theory has become increasingly recognised and accepted, and acknowledges that learning is a continuous process of gaining knowledge which is grounded in concrete experience. Experiential Learning became accepted into practice and although it has never reached the status of a theory (Jarvis 1995:100), is none the less viewed as andragogy, ("the art and science of helping adults learn", Knowles, 1980:43), along with Self Directed Learning.

Importantly, as McNiff et al., (2003:61) explains, I am investigating my work with others and therefore must "keep records of what you do as you respond to your own question".

Research requires careful methodological consideration in relation to its aims, objectives and context. I chose this research topic with the aim of providing an evaluation of the value of the training management team working collaboratively to solve a problem. Useful frameworks for action research methodology are provided by many authors (Carr & Kemmis, 1986; Coghlan & Brannick, 2005; Johnson (2008); McNiff et al., 2003; Reason, 1988; Stringer, 1996; Zuber-Skerritt, 1992a).

Evidence of a need to change our induction processes to a more holistic paradigm (Carr, 1996) was an important anticipated result of the research. The action research loops provided a logical and sequential approach for this research, and an anticipation that individual and organisational learning would result.

3.1.1 Description of the field of evaluation

Given my understanding that change cannot readily be imposed from the outside and that this approach would compromise the value of the outcomes, the research was commenced with the understanding that the training managers and coordinators, and also the instructors, would be part of the change process (Cohen, Manion & Morrison, 2002).

The collaborative methods and co-operative inquiry enabled maximisation of “user” involvement in the decision-making process, and the New Zealand Red Cross management’s commitment to the research process and the proposed action plan added credibility to the research. Permission from the New Zealand Red Cross for conducting the research was an important first step.

I was included in the collaborating group participants (Kemmis & McTaggart, 1988) as project facilitator/principal investigator, along with nine training managers and coordinators (Regional Representatives) who were invited to become the action research collaborating group. Group members developed an instructor’s induction package as part of their normal scheduled meeting times.

I anticipated that the collaborative approach would result in a degree of organisational learning from two perspectives, the first being acknowledgment of the need for the generation of new possibilities and realities for Induction. Importantly, the Instructor’s

principal document, the *Instructor's Handbook* which was printed in 1996 and then reprinted in 2001, needed to be redeveloped into an appropriate and effective process for countrywide use.

The second was that members of the collaborating group gained an appreciation of action research methods and the quality of the resulting outcomes - particularly from collaboration and the process of reflection.

My role as research facilitator involved keeping the research on track by coordinating the step-by-step process and using action research principles. I focused my input on being facilitative and inclusive, ensuring maximum opportunity for all working group members to be active parts of the process (Wadsworth, 1997).

The concept of active involvement of group members strongly underpinned my decisions for this research. It was connected with group members actively gaining new knowledge and applying new skills, reasoning or behaving differently, and altering beliefs and values. The action learning concept offered broad application possibilities (Kember, 2000).

Action learning, as Weinstein (1995) suggests, is to stop, think, ask questions, reflect, and then to return, try it, meet again, and talk about how it went. Action learning is described as *the learning that takes place through concrete experiences and subsequently observing and reflecting on these experiences*. It builds onto a person's experience of the world with a view to further action (Zuber-Skerritt, 1992a:214). It is of particular benefit if there is a complex problem or issue, and therefore is also useful in areas such as collaborative business management. The benefit of action learning, through peer cooperation, enhances professional development, where, through sharing, discussion and reflection participants learn how to find solutions and increase their professionalism (Beatty, Bourner & Frost, 1993).

In acknowledgement of the current workloads of working group members, I completed much of the required administration including the consent processes, writing up of meeting notes and results, workshop agendas and reports, notes and reflections and the distribution of information.

Anticipated time commitment for the collaborating group input was three scheduled full day meetings which included *evaluative action research* discussions of approximately two hours each.

A “Research Time-line” (see Appendix B1) was used as a guideline for the research time frames. The time-line was divided into the participative and evaluative action research sections, and it outlined both the research activities and data gathering for each of the three phases. These were: Reconnaissance, Cycle One; Intervention, Cycle Two, and Evaluation, Cycle Three. The collaborative nature of the research, called for a degree of flexibility and the Time-line was adjusted accordingly. However deadline dates were factored into the schedule to ensure that the research remained on track and was completed within the required time frames.

3.1.2 Evaluating processes and action research

Planned evaluation was integrated during the phases of the action research cycles.

Table 3.1: Evaluative Action Research Process Outline

Summary for the evaluative action research
<p>The collaborating group plan to evaluate the effectiveness of the co-operative team processes.</p> <ul style="list-style-type: none">• The group will engage in reflective practices and discussions during the work project.• Selected literature will be used to add an intellectual component for the group members.• The <i>evaluative</i> action research will evaluate how well the participative collaborating action research worked for the working group and its suitability for use in future projects.• Group members will complete an Evaluation Questionnaire when the research is completed.• Researcher autobiographical reflection be included during the three phases.

The planned collaborative approach supported team members with an “evolutionary” ethos which is open to move wherever it is deemed appropriate at the time.

Built around the three cycles of *Plan, Act, Observe/Report, and Reflect/Evaluate*, the results ensured that all involved had the opportunity to inform decision making.

Through completion of three full cycles and inclusion of selected literature readings, discussions and group work the aim was to ensure maximum opportunity for group input. Involvement in the evaluative action research is summarised in Table 3.2.

Table 3.2: Participation in the Collaborating Group

Evaluative action research working group
<ul style="list-style-type: none"> • The collaborating group plan to evaluate the effectiveness of the co-operative team work processes and will engage in reflective practices and discussions throughout the duration of the work project. • Group members will voluntarily opt into taking part in the <i>evaluation</i> of this collaborating team work and research development process. • The <i>evaluative</i> process will take place as separate meetings which will be held within the scheduled Regional Representatives meeting times. • All members participating in the evaluation will agree to take part by signing a <i>Participant Consent Form</i> and will be able to withdraw at any time.

3.1.3 Methods for evaluating processes and action research

The planned evaluation structure applied to the project ensured reliability of results and assisted with providing the best possible outcomes for the research (Wadsworth, 1997).

A range of evaluation techniques was used to optimise our results. These include:

- Process evaluation throughout the research (Are we on track? Did we do what we said we would do? Did we achieve what we set out to achieve?)
- Group and one-on-one discussions; meetings; written questionnaires; observations; viewing existing documentary evidence; newsletters; field notes.
- Formative evaluation with periodic feedback from my “critical friend” who has excellent technical credentials, has a long-standing interest in the New Zealand Red Cross and extensive business knowledge and acumen; from my supervisors; and from the regional representatives working group.
- Summative evaluation from Massey University for completed report, and
- Group reflections and self-evaluations at the end of each cycle (including autobiographical reflection journal entries).

The cyclic action research pattern was further developed by the Cardno/Piggot-Irvine model (1994), where each plan/act/observe/reflect cycle is placed within the three phases (or cycles) of the research process, namely: Phase 1 - *Reconnaissance* of the problem situation (recording the present situation and completing a literature review); Phase 2 - *Intervention* (action project conducted, gathered data analysed, recorded and reported); and Phase 3 - *Evaluate Intervention* (determine intervention effectiveness,

disseminate information and feedback). The model defines an issue, is followed by the three phases, each containing the plan/act/observe/reflect cycles and ends with a report.

I added “Report” after “Observe” and “Evaluate” after “Reflect” to the model as this fits with my understanding of the cycles. Table 3.3 shows how the phases correspond to this action research cycle Model and how evaluation is seen as important and integral throughout all steps of the process.

I also preferred to see evaluation running *vertically* throughout the process. Vertical representation in recognition that evaluation is considered throughout the *entire* research, not just at the end of each cycle or phase. Inspired by Wadsworth’s wall chart (1997) diagrammatically portraying action research as “a spiral process or a helix” and seeing evaluation concepts as ongoing and integrated, I found my preference was to build in a series of ongoing evaluative micro processes throughout the research.

Table 3.3: Evaluation Throughout the Action Research Cycles

PHASES	Cardno/Piggot-Irvine Model	Headings for the research	
Phase 1	Reconnaissance of problem situation	Reconnaissance	E
Phase 2	Intervention	Intervention	V
Phase 3	Evaluation of Intervention	Evaluation	A
CYCLES			L
Cycle 1/2	Plan	Plan	U
	Act	Act	A
	Observe	Observe/Report	T
	Reflect	Reflect/Evaluate	E

By taking a broader view of evaluation (Wadsworth, 1997) we could regularly explore whether or not we were on target by using a “small but often” (micro-evaluation) technique. Ongoing and self-evaluation ran alongside the formal evaluation processes.

The plan included working alongside the Regional Representative collaborating group, being guided by Instructor feedback, discussions with key people and my critical friend. Progress reports following information in the Instructor newsletters all led me to

believe that those directly involved had the opportunity to provide feedback and feel included, and enabled us to test out our thinking and the workbook in reality.

Communication to stakeholders occurred throughout the project, including discussions with management; updates for Regional Representatives, Instructor newsletter updates and electronic broadcasts to all staff.

3.1.4 Validation and triangulation

Emphasis on triangulation provides increased verification that the analysis of gathered information is providing a more accurate picture of the issues. This is especially helpful to understanding and appreciating complex concerns.

Gathering the data into logical groupings or categories assisted the analysis and helped extrapolate the data into a more meaningful format. Analysis of the feedback and issues raised from the evaluative data gathering processes informed the recommendations of this research. The resulting information was then processed into an action plan or presented as outcomes relating to each area.

This report will provide information on the completed evaluative action research and the resulting recommendations. The results will be integrated into our internal business planning, particularly relating to the quality management standards and procedures.

Credibility of the project was enhanced by maximised reliability and validity through gathering information from a number of sources. Data triangulation was used to identify similarities or discrepancies between collected information ensuring the results are as robust as possible. Data triangulation was provided by a variety of avenues as outlined in Table 3.4 below. Evaluative processes may also have occurred informally.

Table 3.4: Triangulation of Data from Action Research Cycles

Evaluative action research phases
PHASE ONE – Reconnaissance
Reflect on our current actions-in-the-world, design an appropriate way forward (Wadsworth, 1997)
Plan

<ul style="list-style-type: none"> • Identify ways to participate • Collaborating group evaluation discussions and information
Act
<ul style="list-style-type: none"> • Reviewed literature on action research and reflective practice • Selected literature was used to add an intellectual component to the research (subject enthusiasts/experts, mentoring, curriculum, inter-connected learning, training packages, professional education)
Observe/Report
<ul style="list-style-type: none"> • Collaborating group discussions • Notes of reflection discussions
Reflect/Evaluate
<ul style="list-style-type: none"> • Collaborating group members' individual and group reflections • Researcher autobiographical reflections journal notes
PHASE TWO – Intervention, and PHASE THREE – Evaluation
Fieldwork, keep records analysis and conclusions, feedback planning new actions (Wadsworth, 1997)
Plan
<ul style="list-style-type: none"> • Plan collaborating group evaluation discussions and information • Develop Action Research Evaluation Questionnaire
Act
<ul style="list-style-type: none"> • Complete collaborating group evaluation discussions and information • Action Research Evaluation Questionnaire • Observed additional and related factors
Observe/Report
<ul style="list-style-type: none"> • Report and disseminate working group members individual reflections
Reflect/Evaluate
<ul style="list-style-type: none"> • Collaborating Group Evaluation Questionnaire and reflection results • Researcher autobiographical reflection journal notes

3.2 METHODS - DATA COLLECTION AND USE

From my reflective journal, Sept 07

McNiff et al. writes about action research as follows: "You are investigating your work with others"; and that: "You are hoping to influence them so that they come to see how they can learn how to deal with their own situations and lives" (2003:61). They say the research involves me and the team and together we make the research situation. So my role, to facilitate the group to help each member to act and think in a new way, is a challenge. The facilitative researcher approach is paramount for me.

From my reflective journal, Dec 07

I added a business paradigm throughout the action research process. Included were: running meetings with planned agendas; disseminated important readings; integrating planned evaluation techniques; tabling expert teacher and the expertise discussions.

Whilst I acknowledge it could be argued that modifying or being reflexive could also be seen as part of the action research paradigm, as they are responsive to the needs of the group, I make the distinction because I actively facilitated these processes into the meetings, i.e. they did not "fall out" of the meetings as such.

For example I specifically chose the readings; I also chose the group work activity to identify what the group felt were important concepts and values pertaining to being an expert teacher within Red Cross context.

This flexibility was paramount to the success of the research. For example, the feedback profoundly affected the project and this was undoubtedly embraced by the action research methods. It included the unforeseen importance that was placed on addressing the need to support the inductee in an acceptable and well defined national programme; of decreasing regional differences by management structures and the use of well selected and trained mentoring staff.

Also, being responsive and open to changes included prioritising things as they arose. For example: including Human Rights examples; adding cultural knowledge, curriculum delivery and more on Red Cross knowledge; identifying local administration systems and allowances; type of support and acceptable time allowance for induction; added impetus to meeting both for the needs of individual Instructors and the organisation; and the need for national consistency of minimum standards.

From an evaluative perspective this involved responding to feedback. For example: commencing meetings with discussion on objectives, summarising, reviewing outcomes, being careful to integrate all discussion and reflection notes and disseminate to the group; continuing to be mindful of inclusion.

Unlike other social scientific "cause and affect" hypotheses, the A/R hypotheses are more like "working hunches, and take the form, 'I wonder what would happen if ...'. This means that action research begins from where people are ..." (McNiff et al., 2003:61). This real-time approach feels totally right!

Considering different perspectives, both academic and in practice, will give us a whole new picture, a whole new paradigm and whole new beginnings.

Justification for choosing the action research methods has come from the literature review and from the advantages and disadvantages of data collection method options available to the qualitative researcher (Bell, 1987; McNiff, 2001) which provide the preferred approach for this research, namely "pen and paper methods" - including field

notes, journals, documentary evidence - and “live” methods including focus group discussions, interviews, and questionnaire.

3.2.1 Data gathering

Early in Phase one I noted that addressing induction effectively can be complex. Not only would the group have to identify the essential ingredients for an effective induction, but they would also have to consider the issues raised by informal discussion which included factors such as commitment and delivery inconsistencies; dissatisfaction with financial issues and time constraints; support, administration and direction limitations; and a need for mentoring and decreased workloads.

Data for this research were collected from the literature, the collaborating group and autobiographical reflection as the collaborating group planned and developed the new Induction process using three action research cycles each comprising a spiral of “plan, act, observe, and reflect”. During the *participatory action research*, used to develop the new induction process, the group also monitored how well this process worked for them using *evaluative action research* methods.

I invited the working group to think broadly about useful data that could be collected to assist with our research. On recognising the benefits, they chose to use general action research processes to guide the inquiry and its data gathering. The data collection and analysis process was further assisted by the collaborative action research approach, which ensured broad involvement and subsequent agreement.

- a) The *Participatory action research* included planning and implementing the three full action research cycles to collaboratively develop an instructor induction package; discuss and review selected literature; collect data including from Instructor Induction Questionnaires (Bell, 1987; Bouma, 2000), interviews including Instructor Exit Interviews, new Instructor interviews, key external people (Anderson, 1990; Bell, 1987; Gay, 1996; McNiff, 2001), and workshop discussions, reflections and group work, and autobiographical reflection. The majority of the work was completed during usual allocated meeting times, however some meeting preparation, feedback and note checking were also required. As principal researcher for this project I was the facilitator and an active part of the collaborating group.
- b) The *Evaluatory action research* included information from the reviewed literature, and collation of data from the collaboration working group reflections and evaluation meetings, and from my personal journal, as follows:

- Collaborating group evaluation discussions (didactic feedback), was written up
- Collaborating group reflections were written up at the end of each workshop meeting on what worked well that day and what did not, how people were feeling at the end of the meeting and what to change next time.
- An Action Research Evaluation Questionnaire was completed at the end of the research. The Questionnaire was distributed to the collaborating group participants at the end of the project and the action research process was evaluated at the end of the project. Participants were requested to return the questionnaires in hard copy to the executive assistant, who compiled the responses. To maximize confidentiality of questionnaire data the Executive Assistant signed a confidentiality form.
- The literature review included evaluative action research.
- Principal researcher autobiographical reflection journal notes were included throughout the research period and referred to learning, interesting academic concepts, thoughts, issues, problems, ideas and feelings about the action research process as it developed..
- Group feedback on the success or otherwise of the activities followed both cycles.
- Any further unexpected or critical incidences or additional meetings and information were considered as they arose (e.g. Human Rights Commissions question re breast feeding in class and legal aspects of First Aid provision).

An unstructured interview approach was incorporated in the interview and informal data gathering sections. I answered questions if asked, and let my “judgement and understanding” influence my questioning, especially in the Instructor’s Exit Interviews. This, as Fontana and Frey put it, “deviates from the ‘ideal’ of a cool, distant, and rational interviewer” (1998:56).

My goals were to gain rapport during the interview process, to establish trust and to maximise the chance of honest feedback. I wanted to capture both the intent of the answer as accurately as possible, and the meaning and feeling of the response. My personal understanding of the organisation’s culture was advantageous, as this enabled me to gain a depth of understanding of the issues raised.

I acknowledge the literature which suggests a need for flexibility towards the research process, much of which - inevitably - is multifaceted and “complex”. Gilling suggests that both the research process (in this case it was layers, the design, ethics and multiplicity of questions that needed to be addressed), and the people (in this case

personalities, responsibilities, perceptions, language, and vulnerabilities) contribute to the complexity (2000:17-18).

I therefore commenced this research with an open mind, being prepared to be flexible and listening to what people were saying. Notwithstanding this, I accepted that my personality, practices, ideas, beliefs and assumptions also formed an active part of the activity; and that collaborative evaluation action research methods ensured that by collaborating, the group progressed towards making changes within the organisation.

Throughout the action research cycles a variety of data types and collection methods were used to maximise the identification of any obvious divergence in results. Within the many perspectives and methods the group was able to triangulate the data to see if and how they compared.

While much of the reconnaissance and fieldwork data and feedback were collected before the end of October 2007, the final evaluative information was captured during each phase up to April 2008. Pertinent aspects were added as the research developed, especially as the group members were responsive to new information and suggestions resulting from their collaboration.

3.2.2 Data analysis

The investigation of practices and data gathering were clearly identified using triangulation and ethical processes. Robust evaluation processes enabled forward planning activities.

All feedback was collated on a computer using spreadsheets, tables and headings for each area, and grouped into major themes and trends. Implementation was assisted by categorising gathered information into appropriate headings, Excel spreadsheets and graphs (Carr, 1996).

Codes and categories were allocated to all Questionnaire and Interview questions at the writing stage. Raw data were transferred onto a computer using Excel or Microsoft format, and using codes and categories (Glesne & Peshkin, 1992). Information was integrated into tables, lists, charts, summarised grids, percentages, or spreadsheets as

appropriate. Information from the Regional Representatives' meetings formed the blueprint for the process.

As much as possible information was collated on computer in related groups and, where possible, summarised into "containable" units, then analysed. Results were compared and contrasted, weak and strong indicators captured, significant variables highlighted and trends established (Blaxter, Hughes & Tight, 1996; Gay, 1996; Glesne & Peshkin, 1992). Analysis revealed any issues or concerns needing urgent attention.

3.2.3 Interpretation of data

Reflecting on fieldwork and gathered data assisted with understanding the meaning of the results and reaching conclusions. Wadsworth (1997) suggests that by understanding how and why things are as they are, we can explain things better and plan for future steps.

Meaning making will vary according to the research because within each given context the participants have different sets of experience, values and conclusions. It was worthwhile communicating illuminations resulting from data interpretation to the stakeholders to ensure we understood the information correctly and made informed choices for resolution of problems.

I remained committed to the process during the implementation and whilst I anticipated positive results, I was aware that at each step the group was likely to provide added and unexpected issues or understandings which enriched the resulting discussions, activities and analysis made possible by the collaborative and consultative approach which is intrinsically part of action research.

3.3 ETHICS AND PRIVACY

From my reflective journal, Sept 07

Ethics issues are really important; I will carefully follow the requirements. Preparing the proposal was a time consuming step because it outlined the full research process.

From my reflective journal, Sept 07

My reading deepened my understanding and knowledge about action research and action learning concepts and processes. However, I acknowledged, as Meloy puts it, the “trilogy of research “R’s”, that are respect, responsibility and rigour (2002:110).

Meloy posed a series of challenging questions, aimed at assisting would-be researchers to check for themselves if they have the courage and ‘substance’ to go through with it.

Now we are on a roll, these words give me strength and remind me to remain objective because exposing current practice and implementing change may not be easy for all members of the group.

3.3.1 Ethical considerations

Ethical considerations were dealt with as follows (Anderson, 1990; McNiff, 2001; Roundtree & Laing 1996; Tolich & Davidson, 1999).

Participation in the evaluative action research required informed consent and all consent processes were signed off by the Massey University Ethics Committee. Regional Representatives were asked to voluntarily opt to participate in the *evaluation* of this collaborating teamwork process

Consent process details included:

- (a) A letter inviting participation which was given to group members. The letter covered all aspects of the research including aims, who was to be involved, and a guarantee of anonymity. Participants’ rights were outlined, how stress would be dealt with, access to working group information was explained and time-frames were given.
- (b) Regional Representatives participating in the evaluative research project opted into the research by signing a *Participant Consent Form*.

3.3.2 Conflict of Interest

Stringer (1996:159) suggests that the researcher should neutralise power and generate trust by facilitation; and coordinate or facilitate the research whilst providing leadership and direction, and therefore uses the term *research facilitator*. Stringer emphasises a need to catalyse a process which assists the stakeholders, enabling them to analyse their issues, plan and develop their solution. This approach avoids management autocratic

dictates and is necessarily a closely collaborative grassroots orientation where the stakeholders have the decision-making power (ibid., p. 23). I adopted this ethos and way of working.

3.3.3 Confidentiality and Privacy

Confidentiality was taken seriously at all times. Staff involved in the project were required to agree to not disclose anything discussed in the Collaborating or Focus Group and signed that they agreed to participate in the study under the conditions set out in the Information Sheet (see Appendix A1).

Confidentiality agreements and storage include the following:

- Participant Consent Forms on Massey University letterhead include a confidentiality agreement and were stored separately at the offices of Massey University (see Appendix A2).
- Confidentiality Agreement forms on Massey University letterhead were signed by me, my manager, the executive assistant and my supervisors and are stored separately at the offices of Massey University (see Appendix A3).
- The Protocol: Outline for Consent form was outlined prior to all interviews and verbal agreement was sought to participate in the research interview. Results are to be kept on file for verification and marking purposes and until the final report is presented.
- Original data information and consent forms will be destroyed using confidential destruction methods after 5 years as required in the ethics process.

Privacy was taken seriously at all times. All staff involved in the project were assured of privacy. No individual names or initials were used; all feedback and data were written up and presented using codes and categories and collated spreadsheets were presented without the possibility of individual recognition. Any individual concerns or difficulties were completed in private and not disclosed to any other party.

3.3.4 Massey Ethics Approval

This project was reviewed and approved by the Massey University Human Ethics Committee: Southern B, Application 07/26. Anyone with any concerns about the conduct of this research is invited to contact Dr Karl Pajo, Chair, Massey University Human Ethics Committee: Southern B, telephone 04 801 5799 x 6929, or to email humanethicsouthb@massey.ac.nz.

CHAPTER 4

DATA

4.1 MEETING ONE

From my reflective journal, July-Oct 07

Our co-operative inquiry became meaningful as the collaborating group discussed the issues, sharing their thoughts and ideas around induction, action research and evaluation.

This evaluative study took on a life of its own as the group worked together and shared their knowledge and ideas. None of the working group could predict what the end results would be.

I feel reassured that I have already experienced considerable insights and discoveries about myself which have proven invaluable (including the value of my already treasured Research Journal, my hunches such as the value of using the 'group brain' to solve problems, and also, that both as principal researcher and in my management role I am able to influence the research's success).

My theme today is evolution - it seems like things evolve through thinking, applying, discussing, reflecting ... and with time. We need to keep evolving the process - evolving the concept, evolving our understanding. We need to embrace new information, to allow a new way to emerge - a chrysalis shedding an old casing for a new form - an old skin shed for a new look.

I have to take the group and they will take me, the journey will be an emerging together - to see the evolution of a new way.

Evolving through:

- Reflection - feelings, hunches, notes, readings, everyone's ideas, formal and informal, thinking of ways forward.
- Knowledge - presented materials, workshops, inputs, discussions, interviews
- Ideas - insights, concepts, thoughts, brainstorming, maybes
- Time - working group, collating, thinking, reflecting, discussing
- The process - willingness, changes, openness, responsive, take diversions, include the new
- Inputs - from group; others; self; exited, new and current staff.

Taking a leap of faith

Like a yacht race, we have to keep moving towards the goal - each step towards the guiding light. Keep out of (NO!!! Use positive statements!!) Keep within the lay lines. It's like there is a path with key points - and then lots of diversions - some important points to solve/sort, others not so important, but in the end all leading to our guiding light - our goal. All the points contribute to the whole, to the end result in some way.

Embrace diversions! I have to remind myself that it is as much about the process as getting the job done. Diversions may come up with good points!

The collaborating group had agreed to work through three successive action research cycles. The cycles would each consist of deliberate activities to address the four elements within the action research concept, including to *Plan, Act, Observe/Report and Reflect/Evaluate*.

The first cycle of *Plan, Act, Observe/Report and Reflect/Evaluate* related to **Phase 1: Reconnaissance**. *Plan* commenced with establishing the need for the research, identifying how the action research loops could be integrated into the New Zealand Red Cross context, devising the layout of the research, planning the research question and developing the rationale for management; *Act* included submitting and receiving Ethics Committee approval, confirming who would be involved and gaining their consent, organising appropriate time-lines and completing notes from the reviewed literature, plus collaborating group Meeting One in which the plan was set in motion; *Observe/Report* included looking at how the theories might be integrated into the research and writing up Meeting One notes, and reporting on progress to management; and *Reflect/Evaluate* related to thinking about the value of the research, considering how best to conduct the facilitation, commitment to the process, outlining possible evaluation processes, considering gaps and where to go from here, and reflective practice.

I completed much of the early work in the initial planning and sorting of the reconnaissance phase, but as the research concept evolved and consolidated the collaborating group became involved. For example, at Meeting One members discussed the research proposal, signed the ethical consents and agreements, discussed the research methodology, looked at time frames and included reflective practice. Completing the research proposal and requirements provided coherence to the process and formed the cornerstone for the research.

The second cycle for the collaborating group was **Phase 2: Intervention**, and involved Meeting Two. *Plan* included identifying how the group would work, justifying what to measure and how, checking time-lines, looking at whom to keep informed and how, and identifying and planning all aspects of the data gathering processes; and *Act* included implementation of the data gathering plan, ensuring triangulation of data - including

other data sources - and acting on all required action plan points; *Observe/Report* included full documentation of all collaborating group workshop activities, notes from discussions and brainstorming, and writing up action lists, and *Reflect/Evaluate* included reflective practice following each meeting, asking if there were other areas needed and if we can realistically change things, discussing and reflecting on progress, rechecking our plans and - for me - completing Journal entries throughout the cycles and considering critical friend input.

The third cycle for the collaborating group was completed with **Phase 3: Evaluation**, and involved finishing Meeting Three with two final evaluation activities (an evaluative reflection and a questionnaire). In this cycle, *Plan* included identifying final activities and evaluation processes, planning for the final report, and preparing for the final evaluation activities; *Act* involved completing and considering all the final data and information gathering; and where - at the end of Meeting Three - the final action research evaluative reflection and evaluative questionnaire were completed. *Observe/Report* was completed by me and included critically evaluating the evaluative data results, reviewing the effectiveness of the research process, completing the data synthesis, analysing and writing up; and *Reflect/Evaluate*, which involved reflecting on the process and progress, identifying new insights, obtaining formal and informal evaluation feedback from members, and individual completion of the collaborating group questionnaire. The final report is available for all staff.

4.1.1 Data from phases

Data from the phases included the literature review, which revealed the methodology and detailed the information to develop the questionnaires, interviews and research action plan. Whilst this review was broad, it gave significant background for research on the subject and offered a way forward for conducting this research.

The theoretical readings provided a focus for meetings and gave me security in the knowledge that the action research process would be helpful, adaptable and provide a foundation and working structure for quality improvement.

Through the literature review I sought to answer questions on both the participative and evaluative action research requirements including action research methodology; action

learning and learning styles; experiential learning and reflective practice; designing learning packages; effective learning environments; and professionalism, expertise and mentoring; curriculum and product concepts.

4.1.2 Data from other sources

Current knowledge - Early on in the meeting we reviewed the action research concept. Primarily this was because some members of the collaborating group were new to that way of working. To understand people's level of knowledge, I asked them to write their current understanding on paper. Three said nothing, three had a general idea of the concept and three had a good understanding of the cyclical process and how improvement can be gained by working through the plan-act-observe-reflect process.

Research plan - Meeting One was substantially process oriented and outcomes reflected this. The research plan was agreed on and submitted for ethical approval; triangulation using a variety of data sources plus the literature review was discussed; current induction processes were tabled and key points listed; important induction requirements were discussed; the research concepts were agreed on; and reflective practices were commenced.

Previous information gathering - The group agreed that feedback information from the 2003 research would be used as an effective document against which to review, and agreed to gather further information from instructors who have joined in the last year.

The group deemed that the Regional Representatives group activities since 2003 were worth mentioning, particularly because of the value of the accumulative achievements which had resulted in substantial overall improvement.

At the end of the meeting the group reviewed and agreed to the important next steps to include in our planning. These included that the induction questionnaire would be sent to recently employed staff; that all the workshop notes would be written up and disseminated to the group to provide a record and vehicle for further consideration; that information already gathered would be integrated into the initial draft induction concept; and that regional induction samples, self appraisals and exit interviews would be considered. Finally, the group compiled and agreed to the research time-line.

The action plan which the group created for the next meeting was substantial. It included current data sources which needed to be considered, identified others which needed to be collated and additional information which needed to be sourced. Members recognised that the work was important and agreed to the plan.

4.1.3 Data from reflective practice: Meeting One

The collaborating group commenced a scheduled reflective practice session at the end of Meeting One.

The summarised comments presented at the collaborating group's reflective practice following Meeting One included such things as good support for the meetings and teamwork; appreciation for the clarification of process, increased confidence and motivation; and enthusiasm for positive planning and for the rollout. The first working group reflections, as would be expected, also included feedback relating to the morning's general business items.

The reflective notes were written up and, when collated, the comments were divided into two categories: appreciative comments and comments which specifically described feelings or added learning.

I divided the "appreciative comments" into those relating to the meeting; those relating to the action research process; those relating to appreciating being involved in the team and those relating to the need for the research to occur.

Appreciative comments relating to the actual day included: "*Great day*", "*Nice food*" "*Made progress pm - new area ✓*", and "*Great support day*".

Those which related to the research process and looking forward to the results, included: "*I find it great to clarify processes and motivate and make more positive plans regarding instructor training*", "*The day went really well, everyone on board for this project*", "*Looking forward to seeing the results of this project*", "*The change in the group or working together is really great -- things have changed over the last three*

years” and *“The plan we made today will fit fabulously, all the points that were raised will slot in easily and they are all really relevant”*.

Appreciative comments relating to appreciating being involved in the team included: *“Look forward to the next meeting”, “Happy to be involved”, “Enjoyed day more than expected”, “The team feels pretty good, intelligent discussions”, and “Teamwork ACE”*.

Appreciative comments relating to the need for the process to occur included: *“Step forward for everyone, we really need a robust induction programme which will be of benefit to everyone”, “Positive group environment with fair, equal and nonjudgmental team members” and “Will be looking forward to the roll out”*. The need for the induction package was summed up with this comment: *“Induction is something we have been looking at for awhile and have made some progress in this area. But it requires more resources and expertise, a specific program. It is an area that we believe if we invest in the return will be far greater”*.

Comments also referred directly to the process facilitation and included: *“Recognising of all the time, knowledge and thought put in by chair -- we are receiving quality”, “very professionally led” and “well led today making good progress, not too many interruptions or interference”*.

There were comments which specifically described feelings, including increased confidence *“Giving me more confidence to deal with any instructor issues that may arise”, “Very appreciative”,* and several comments which related to being appreciative and the value of the added personal learning: *“Very pleasant group to work with and have had many ‘spin off’ learning information”, “Great to see inter-regional sharing”, “It’s great to feel we are moving forward with the induction package”, “I feel really excited about being on the way with the induction package”*.

There were no directly negative or unenthusiastic comments within the reflective practice feedback provided. The up-beat and positive comments, and orientation

towards practical aspects of the day itself, together with feelings of excitement, confidence and appreciation, did not include negative or probing comments.

4.2 MEETING TWO

From my reflective journal, Nov-Dec 08

The formal and informal evaluation techniques are valuable to gain a rounded result. We seem to be considering a huge amount of information – discussing it, agreeing to areas needing to be included and ticking them off when they have been fully considered by the group members.

The result of the informal deliberations and formal evaluation structures positively affected my thinking because I am now able to view feedback more objectively ... more critically and adjust the research process accordingly, therefore ensuring the best possible outcomes.

I am absolutely over the moon, the group has worked so hard, everyone has gone the extra mile and some! A totally full on day, we climbed a mountain! One person's reflections have made it all worthwhile for me because it showed honesty and perception. It said what was "good" about the day was – "Realising that there are induction processes that are not covered for new instructors in our area and that the induction process, when it has finally finished, will provide a standard format for all – good".

Entering into the improvement phase has presented the challenge of compiling recommendations which need to address the complexity of issues raised. This is made more complex because of the different ideas flying around – all good and very useful information, it's just hard to keep abreast of it all. I'm coping by writing lots of notes as data come in – thank goodness for the whiteboard and flip charts for brainstorming and recording group work.

Problem solving – maybe I should take on the broad idea to see each problem as a gift to getting better/improving. Fletcher said on the radio – just deal with today's problem – never think about tomorrow's! Collectively we are coping with peak and complex information so focus is essential.

We must ensure our training staff get the kind of induction and subsequent training to be leaders and ambassadors for Red Cross. They need our ongoing support towards excellence.

Even our Training Managers and Co-ordinators need support – they too are professionally isolated. I am pleased that they appreciate these meetings – where a lot of sharing of ideas, concerns and ways of working happens both formally and informally.

I deliberately called the meetings "workshops" and suggested people wear casual clothes because we would be doing a lot of group discussion and workshopping. My intention was to create a relaxed atmosphere where the group could work together and where the environment was adjusted to being less formal and more congenial.

A relaxed working environment was a priority. The workshops meant responsibility for members but would also be learning experiences for them on both an individual and a group level. I recognised that the agendas were going to be a challenge due to the quantity of work which the group needed to cover, however I was not keen to compromise a holistic and comprehensive approach where everyone was respected and listened to. My aim was to use every minute available to solve our problem together and I was totally aware that, with a group of this size, this would take extra time.

4.2.1 Data from phases

To set the scene for the second cycle, Meeting Two, I chose the whiteboard quotation: “*Critical reflection is emphasised in most educational contexts (e.g. teacher education) and is often described as a goal in education*” (Cranton, 1996) because my aim was for the group to learn from the day and I anticipated that reflection would be a key aspect for this learning.

We started the workshop by identifying and listing the *Outcomes* the group had previously identified for accomplishing at this meeting and how the group would achieve this. For example, these included *the package, critical issues, current systems, setting the way forward, constraints and time frames* but they also focussed on their intrinsic needs including *learning, and sharing points of view and new knowledge*.

The group aimed to finish the meeting with a plan for a well considered and concrete way forward. All data needed to be assimilated, weighed up and actioned.

The process of compiling all the supporting information into the computer provided the group with ready access to data requiring consideration. All the information could be dealt with by the group or subgroups and could be thought about within the context, given a priority and utilised accordingly.

Considerable deliberation occurred around some of the information (for example, the problems resulting from professional isolation and completion incentives) and in other cases information was “parked” to be dealt with in more depth later in the process (e.g.,

maintaining records and also how to appropriately deal with special needs, including the Code for Health and Disability).

Contemplation and deliberation became the hallmarks of the meetings as the group took all the supporting information and discussed each issue prior to making a decision on it.

Compiling information and data also provided a paper trail for double checking to verify that decision making was on track. Compiled data could readily be compared, and progress could be checked against the resulting decisions and action lists. Results documents were filed chronologically for easy reference. The culmination of all the feedback provided an increasing and cohesive snapshot of the issues and concerns and provided a way forward for the collaborating group.

A significant recommendation, to move the development forward as quickly as possible, was made when the group realised the importance of the outcomes and became really keen to utilise the results.

4.2.2 Data from other sources

All gathered information was worked through by either the full group or subgroups.

Problem Solving List – So as not to miss anything, the group developed a *Problem Solving List*, which was added to any time members thought of an issue or situation which needed to be included. The group was able to address these as time allowed.

Readings - Having been personally inspired by the academic process and readings, I decided to select a few readings to frame an intellectual approach to our work. I chose readings on *action research, distance learning, interconnected teaching, professionalism, curriculum development, teaching excellence, expertise, and being critically reflective* to set the scene or to provide interesting academic perspectives for our workshops.

Each working group member presented a summary of his/her reading and how s/he saw the fit within the Red Cross context. The group followed each presentation with a discussion in which considerations for action research processes were summarised. The

resulting discussion notes proved very helpful when the group did the final review checks of the induction package. For each point the subgroups were able to ask: how/where have we addressed all the points we raised, and if not, how could we?

Effective teaching and learning within the Red Cross context – I decided to introduce the idea of identifying what the group saw as “effective teaching and learning” within the Red Cross context to obtain a broader picture of member viewpoints. I divided the group into three subgroups (*managers, training coordinators/instructors, and learners*) and asked each group to focus on what elements or aspects might ensure management, stakeholder and customer satisfaction. The groups discussed the question “*How do we know effective teaching and learning have taken place within the Red Cross context - three different viewpoints?*” One of the members offered a starting point by differentiating between *teaching* and *learning*, as follows: “*Learning - permanent or semipermanent change in behaviour brought about by experience*”, and “*Teaching - a method of bringing about that experience*”. The group then itemised, reflected and reported on their thoughts, resulting in a comprehensive list of points from the three perspectives.

Expert Teacher: concepts and values – This exercise involved group work where members contemplated the brief, which was: *Within the New Zealand Red Cross learning and teaching context, discuss and write down the relevance of the following concepts and values. Also consider different cultural perspectives that influence people's views and attitudes to the concept.* For each concept (excellence, expertise, competence, quality) and each value (autonomy, collegiality, professionalism and reflective practice) the groups answered the following questions: What is it? What does it mean? Is it important? and How have we integrated it?

Information from these two exercises provided the group with a way forward for the improvement loop.

The process of summarising and repeatedly re-examining our previous work assisted our review and reflective practice processes.

Having completed much of the planning and action cycles at Meeting Two the group then observed and considered each issue raised. The data, information and results of the group deliberations were written up in the phase *Observe/Report*. Reviewing and considering workshop notes, summaries, readings, incoming additional and supporting data and group reflections proved to be valuable because the group was also able to check progress, identify gaps and make further planning decisions.

4.2.3 Data from reflective practice: Meeting Two

One of the collaborating group members introduced this evaluative action research reflective practice session as an opportunity for “thinking and talking about things in the *cold light of day*” and suggested that key result identifiers of reflective practice look at the good parts, the not-so-good parts and identifying what to change, which were ideas gained from Brookfield (1995). This member also suggested that the process of being prepared to question what is “always done” takes time and focus - especially if outcomes are sought – but that it is useful, and that benefits of a normal “commonsense” approach as applied to various classroom situations being critically reflected upon, can be profound. The group readily agreed to complete the reflective practice.

The group member led the reflection activity by asking each group member to list *what was good about the day, what was bad about the day, what to change*.

Based on this, one group member wrote we needed to “*get to the root of what we're doing; ask, Is it right?*”; *be comfortable to look at things; the tutor has to take a leading part in the teaching -- to be confident; and recording helps you to think about it, and keep focus*”.

“**Good**” reflections indicated that the group were happy that the Induction package was started, that progress indicated a concrete start to bringing it all together, to sorting the framework and moving from ideas and concepts to something concrete.

Two of the group members found the readings presentations were very interesting and one stated that s/he had “*learnt many different things*” from them.

Eight members commented positively about the group work learning experience stating: *“Great group!”*, *“Shared heaps of information, learned new ideas”*, *“Good group cohesion”*, *“fabulous work by all”* *“Gained from a training and education point of view”*, *“Good to think outside square beyond what we normally do”*, *“Working together”* and one affirmed their *“Trust in group great, can toss things around and it is accepted”*.

In terms of the administration and facilitation, all comments about the food and venue were good, as well as the *“Clarity given about purpose etc.”*, *“Excellent resources”*, and *“Well structured” facilitation*.

Another said that the *“Distraction from everyday type work is refreshing”*. The insight that current induction processes would benefit from our research outcomes was particularly reaffirming: *“Realising more to induction than currently offering new instructors”*.

“Bad” reflections indicated the full agenda was a challenge, with comments such as that *“The day was pressured for time”*, *“Needed more time to sort out framework”*, *“Had to get up too early. Bit tired”*, *“Not enough time to consider topics when doing the structure - felt input adequate. Always hurried”* and *“Such important topics need respect”*. Two members felt the group work process early in the day could have been tightened *“Slow start – unsure”* and *“Beginning of day was slow”* and also the enormity of the work was commented on: *“Hard work - a lot to get through”* and *“Seeing that there is a lot to do. Tip of the iceberg”*.

“Change” reflections included five comments each about time factors and suggesting that the workshops should have been held over two days: *“Needed to be over two days”*, *“Two days planning framework!!!”*, *“Although could not happen - time constraints”*, *“Come day before, or stay second day”* and *“more time together, maybe overnight”*.

Also suggested was that I could have been clearer about what would occur during the day. *“Objective at beginning for outcome achievement”*, *“I wish I had known more*

about what was going to happen on that day”, “Detailed goal for day”, “Objective for induction project” and “Set map, time frame”.

One member reaffirmed that it was *“Very helpful to get information from each other”*, and there was also one comment that the room temperature could have been warmer.

4.3 MEETING THREE

From my reflective journal, Feb 08

How important it is to acknowledge where group members are coming from. Collectively we bring a wealth of experience, viewpoints and ideas to the table. Tapping into this diversity can only strengthen our end result. I am pleased that our work together has offered our staff a unique and seemingly valued, learning experience.

Each individual's experience, training, attitude, age and stage of development, and the personal integration and making meaning of their learning, all influence the way they interact in the society in which they live. Similarly, the socio-cultural milieu of the broader society in which the individual lives, influences and moulds the experience of life for those within it (Brookfield, 1987).

Jarvis echoes points about the social milieu, context and influences as being central to adult learning, suggesting that aspects of the “self” integrates the “past, present and future and are socially defined” (1995:44). These situational aspects which influence learning are also acknowledged in a similar way by Knowles et al. (2005), within the middle ring of their model entitled “Individual and Situational Differences”.

In the end however, the learning outcomes reach beyond the individual level. Whilst the learning may be aimed at individual growth the institutional goals frame the learning outcomes (which, in this research are relevant to both induction and the evaluative action research).

Based on the reflections and evaluations following Meeting Two the group was able to plan the objectives and activities for the third cycle, Meeting Three, including working out the desired outcomes and consolidating the steps to complete the final data gathering processes. The agenda included integrating ideas and work from the previous workshop, observing and final reporting on data gathering and completing the Meeting Three reflective practice, and then finally commencing the evaluative action research process and questionnaire.

The collaborating group's third meeting again had a very full agenda. I used Yoland Wadsworth's words to focus the meeting as follows: "*Participatory Action Research is an approach to improving social practice by changing it and learning from the consequences*" quoted from "*Everyday Evaluation on the Run*" (1997:79).

4.3.1 Data from phases

Meeting Three included a degree of double checking and fine tuning. All final data gathering was acted on, the final reviews were completed and results integrated, all final group-work was responded to and "to-do" lists were completed. The task of ensuring that the workbook met the desired outcomes for instructors from widely varying backgrounds was a challenge, but the group felt satisfied that they had acted on, and achieved, their goals.

The following summarises the Observe process undertaken at Meeting Three. To start with the group asked some general review questions and were satisfied as they looked over their final work. All workshop group work was written up, the feedback was summarised and the group reviewed previous work to ensure that they were still on track.

Table 4.1: Meeting Three, Observe/Report Activities Summary

<p>Review questions</p> <ul style="list-style-type: none"> • Have we addressed our "must remember" lists? • Have we addressed our Effective Teaching and Learning notes? • Have we integrated all our work on "applying to induction process" notes • Are we on still track, or do we have any gaps? • Does our product adequately cover what we set out to achieve? • Have we missed anything, has anything else come up for anyone? • Did we word the documents adequately, are there any further changes? • Who can help with grammar accuracy? • Any other bright ideas?
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4.3.2 Data from other sources

Readings - Members discussed, at some length, the value of including experiential learning concepts and the importance of mentoring. They agreed that, due to current structural constraints, mentoring would be integrated via their manager or supervisor

and to encourage the new inductee to seek assistance from colleagues whom, they felt, they could approach.

Key Person Interviews – The aim in two interviews was to provide final verification that the working group had met its objectives. A human resources specialist rated the importance of good induction “10 out of 10” because it laid the foundation for the organisation as well as for the new staff member. Feedback and ideas verified that the working group had achieved most suggestions; similarly, the endorsement provided by an external education adviser showed that collaboration had enabled the group members to meet their aims and objectives.

4.3.3 Data from Meeting Three reflective practice

All members sat in a circle to evaluate how the action research methodology had worked for us in the final *group evaluation reflection discussion*. One of the members took notes and these were then summarised into subheadings of topic categories.

I opened the group evaluation reflection discussion with an invitation for a time of reflection and evaluation - a time to ask – “How are we going? Are we on track? What did we learn? What can we do differently? What was great? What wasn't so great?”

The reflective practice notes were divided into three areas: *the action research process*, where comments included the value of the process; comments about *the readings*; and comments about the induction package itself - and areas which indicated issues which were deemed problematic but *then transitioned to outcomes*, including feelings of confusion and time factors.

The Action research process - Positive aspects on which members commented included the value of group input into solving a complex issue; the continuing cyclical progression and reflective practice which enables responsiveness to change; providing the facility for best outcomes and ongoing improvement; and bringing cohesion nationally, working positively together in a new way and looking after each other's welfare. Group support and trust were also built during the process as indicated, for example, by the comment that the action research process was “*Very beneficial – felt enabled to self-correct*”.

One comment acknowledged the change of approach from the individualistic to the collectivistic: *"The benefit of working as a group, using everyone's different talents/ understanding/input really ensured we would get it done well ... it was certainly effective, once underway"*. The feeling that the collaborating group *"was new to action research - was a different style to the way we usually interact"* was further clarified as resulting in the group's opening up with the statement: *"Likened us to the person being inducted -- This action research project has been a beneficial process for us as a group. Being an entirely new process for RR we have had to open up, rely on each other and are starting fresh"*.

One respondent initially found it difficult to understand how the issues raised could be transferred into a practical action learning type workbook framework, but felt that s/he had learned from others who could do it well. This turning of information into a learner's perspective was also mentioned in relation to reflection and its integration for our learners (instructors).

Another comment concerned the view that the work was *"a bit haphazard, like, how is it going to get us there?"* but then this person added, *"I am sure the results reflect the true intention"* and qualified this by saying, *"I wasn't uncomfortable, and felt guided. Any gaps I perceived were filled by the end of the process"*. Another said *"Now we have worked through the process my reading makes sense ... Went from confusion to understanding the reading ... lots of big words ... We have now been part of the cycle that has now become 'alive'."*

The process challenged assumptions about current learning expectations and required knowledge, skills and practice. One person explained how we currently focus on subject areas, not on real knowledge. Our current induction practice had not enabled us to identify induction gaps, resulting in other problems *"then we jump around because we want the outcome ... We missed huge sections -- we expect them to pick it up"*.

The comment that *"Maybe currently colleagues provide a process which reflects their own induction into the organisation"* suggests that our assumptions are that what we had (or do) would be satisfactory; however this was not seen as being the case. As one

person stated: *“Good induction will go some way to prevent assumptions by the new tutor, miscommunications, and assumption on the manager’s part that the new tutor had been told”*.

Expectations and clear instructions were seen by one manager as being important: *“But if we don’t give clear instructions of expectations -- if we don’t tell them we shouldn’t expect!”* This comment reflected the satisfaction one new instructor expressed because of his/her manager’s direct support. Notwithstanding the assumption held that our instructors are a resilient group of people, *“Instructors are good at taking the ‘unexpected’ in their stride”*, however the new instructor feedback indicates their vulnerability and learning needs despite their credentials.

The realisation of the group of the *“huge amount of knowledge we expect people to know”*, was acknowledged.

The Readings - Sharing the wisdom from different readings, as they applied to action research and induction, provided additional focus and understanding. The new ideas, additional perspectives and best practice were appreciated. In particular, they resulted in discussions of recruitment priorities of medically trained versus recruits with a teaching background; and the critical importance of buddying and mentoring during induction for which the group then discussed possible training providers.

Whilst some of the terminology was a challenge for some, one comment indicated ongoing application and learning - *“It wasn’t till much later - when I moved through the process and could apply bits of learning - that it seemed fit”*, *“lots of big words. We have now been part of the cycle that has now become “alive”.*”

Transitioned to an outcome - Much of the discussion involved transitions which resolved to an outcome. For example, some experienced a feeling of confusion (which was seen as being part of the process; part of moving for change; and learning and reflecting on consequences) but these seemed to resolve by the third meeting, or as the gaps were filled by collaboration. The amount of time between collaborating group meetings was listed as the most problematic aspect of the PAR process - for example, as *“a barrier to moving forward”* but was also expressed as an example of transitioning to

another state, “*eventually we got there. I am now excited*”, “*I didn’t think we would achieve our objective. I am quite surprised*” and “*...the result was a great document we could now work on*”.

4.3.4 Data from the Evaluative Reflection and Questionnaire

Meeting Three was focussed on the evaluation. The pre-test feedback had been integrated and the trial phase was almost over. *Instructor’s Induction Workbook*, the *Instructor Induction Record* became a tandem item and had been used by new instructors for several months. The working group had seen the induction process in action with their new staff and were happy to see all the feedback integrated into a practical working document. They were happy with their decision that the bound format produced in-house, with an attractive cover, was entirely reasonable and produced at minimal printing cost.

This meeting was about evaluating how well the action research processes had worked for the group. It was also a chance for me to thank the group for all their hard work, willingness to participate in the action research and their dedicated enthusiasm.

The final collaborating group discussion revolved around evaluating the action research process and included several learning and process insights as well as supportive and conceptual reflections.

The evaluation was run in two parts, firstly a group *Evaluative Reflection Discussion*, followed by the completion of the collaborating group *Evaluation Questionnaire*.

All members sat in a circle to evaluate how the action research methodology had worked in the final *evaluative reflection discussion*. One of the members took notes which were then summarised into six categories as follows:

Induction material - Three comments related to the induction material. One was positive, “I think that the document is great” and the other two had concerns which we expected be addressed by pretest and trial phases. One said, “Until it is a complete document and is transformed for the purpose it is designed, we won’t know how well it works”. This member also commented: “The size is a bit big. Worried about losing

pages, has to be a working document and it's not good if pages or bits go missing. Has to be a do-able document, contains a lot of information", but ended positively by saying "I would have liked it a few years ago".

The second member, who had not been able to attend the earlier meetings, affirmed the workbook but also had a question about it: "I came into the process half way through, hard work been done by the group. Great workbook. Is it fit for the use it is identified for?"

The action research process - All seven comments relating to the action research process were positive, for example, "Have really enjoyed it, it worked really well" and "Really enjoyed process as am analytically minded".

Others commented on the unexpected outcomes of the process, for example, "Was surprised that it has worked as well as it did. It seemed to move from step to step really well", "Really pleased with what we have come out with; I couldn't see how it would come together" and, "Interesting when started in how it was going to be put together. It has come together. We had to look at the ultimate outcome".

One member had used similar processes in the past and warned, "Have to be careful not to get caught up in the process but it worked really well".

Unlike other time-oriented comments, one member stated that the "Model itself is a very good one. Time factor has contributed to it".

Action research process related to working in a group – Members affirmed their positive thoughts and feelings about collaborating in a group, for example, "has been a really good experience working in a group", "Group type process has been really good", "There were many critical factors involved and we covered them as a group really well" and "I think it's been great where minds have gelled".

Two comments also referred to the team's approach and outcomes. One member mentioned the way the group had worked together. "Process itself has been quite useful for this group. Getting everyone thinking along the same wavelengths, process of

understanding our differences” and the other commenting on its success, “Great that a group like ours has been able to do it”.

Facilitator – Direct comments about the facilitator affirmed that the inclusive, respectful and listening approach had largely worked, “Guiding us through the process, you did extremely well”. But ensuring that the process was carefully communicated and implemented was also important, “Setting the scene at the beginning was really important”, “Contribution has been huge, holding it all together, making it happen”, and “Putting information on a board and then transferring it into this document has been a fantastic process. Some stuff on the board, interesting that it came into shape to formulate the book”. What I thought was the ‘wild card’ in my process was also appreciated, “Readings too were really interesting”.

Time factors - In terms of dislikes the time between the meetings was singularly the most mentioned area, with four participants saying that the project would have been assisted if meetings had been closer together. The available time to focus on the project was also a problem due to other workloads.

The problematic time sentiments were echoed in the final group discussion, where four people mentioned that the time between had been too long. These quotations included “*You can't remember things or what you are meant to do then you try to do them at the last minute. I just find so much has happened*”, and “*Time line was a bit tight, everyone is very busy*”. Although, by contrast, when the time/cost was mentioned, another member replied that the “*time factor has contributed*” to its success.

Financial question - A new member to the group questioned the financial aspect, asking how much money the book would cost to print and how many man-hours it had taken. “*Was it the best cost-effective way?*” However, another group member then replied, “*I understand what you're saying - but I think the whole process has been cost effective, otherwise paying someone to make up the document would be expensive. This process has caused it all to come together. I think that the document is great*”.

Following the final *evaluative reflection discussion* the members then completed the collaborating group *action research evaluation questionnaire*.

The evaluative comments fell into two broad categories: those about the Induction document and those about the action research process and related teamwork. A summary of the categorised list was compiled, and the full evaluative spreadsheet was completed by the Executive Assistant to ensure anonymity

The following outlines the responses to each question in the Questionnaire:

Q1. What would you say are the most important outcomes or achievements of the project?

Twelve comments affirmed that the group had met our objective of producing a workable and effective national instructor induction process suitable for use nationally. Also four other positive comments related to review, enabling new instructors and enhancing professionalism.

Four also commented on the positive aspects of teamwork such as team building and sharing information and expertise. Eight members made positive comments specifically relating to the PAR process. These were a delight to read including, for example, *“Group consensus on key deliverable areas”*, *“Equal, fair and unbiased input”*, *“greater understanding”*, *“we have all been working together and sharing ideas better than before”*, *“All views were canvassed”* and *“focus and group work enhanced the cohesion of the group itself”*.

Two also suggested that *“Everyone in the group will be feeling that they had a satisfying amount of input”* and *“along the way I believe the group has learnt so many other things”*.

Q2. Were there any areas you believe were inadequately covered or not dealt with satisfactorily?

Two commented positively saying, *“All aspects were adequately covered”* and very good process for appropriate alterations, suggestions and recommendations; and reviewing all feedback was valued. Four answered N/A or not applicable; and two raised questions about the document size, aims and target group; and that going over things that have already been decided slowed progress.

Q3 What aspects of the action research process did you particularly like?

Q4. Were there any aspects of the action research process you particularly did not like?

The working group indicated a lot of satisfaction with the action research process. In particular the *"sharing of ideas"*, learning how different areas worked *"brainstorming on the spot"*, the sharing of resources *"In particular I was impressed on how soon we gathered the material"*, and that the process was enjoyable *"I enjoyed the research at the start and the group work"*.

Comments about the enjoyment experienced varied amongst the group and included *"planning, design and reflection"*, *"group work, fieldwork and analysis"*, *"working with people I had never met"*, *"Reflection and feedback"* and *"the 'design' segment where we started to create the workbook content, and shape it"*, and the process also helped the group in appreciating *"how fragmented we are from Region to Region"*.

Two people commented about the unknown aspects of action research, for example *"there were times when it all got a little off track"* and *"The process, though detailed and at times difficult to understand, became clearer as guidance was offered"*. The number of people involved was mentioned by one person suggesting that the 3-month gap between meetings caused continuity difficulties, and that *"a smaller group 5 – 6"* might *"make things flow easier, move along faster"*.

Others also learned from the being involved, offering comments such as that they liked *"All of it - I liked gaining an understanding of the process itself ... I also enjoyed working alongside this group of people - very diverse, different levels of interest and skills. It was done in a very friendly manner. Reflection is a favourite part of the process"*.

Several commented on how their feelings changed as time progressed, for example one stated that at the beginning they did not understand how the readings fitted into the bigger picture, *"However, at the project conclusion {this} became clearer"*. Another commented that, *"Initially the whole process appeared daunting"* and continued, *"but*

as a group worked the different aspects were 'teased' out and generated positive results".

Another also commented on the literature review, stating, "*At first not particularly keen on the literature review. Slightly tiresome reviewing the content detail (in some areas)",* however this is balanced by positive comments, for example, "*Readings too were really interesting"* and "*Particularly liked the readings that were analysed as it made thought processes clearer and provided enlightened ideas"*.

Facilitator evaluation feedback was included in the last group discussion and acknowledged my input - for example, "*Guiding us through the process, you did extremely well"* and that my "*... contribution has been huge, holding it all together, making it happen"*.

In terms of the feedback relating to me, as principal researcher, it is fair to say that I was very surprised and pleased with the comments. I appreciate that some view questionnaires as less reliable due to the possibility of misinterpretation, or as Wadsworth puts it: "They can be unpredictably difficult, often artificial, and frequently result in an exchange of misunderstood meanings!" (1997:27). Nevertheless, by the end of the last meeting the group agreed that they trusted each other enough to contribute to open discussion. This felt to me like a vote of confidence for each other, and symbolised that I had achieved what I had wanted to as facilitator.

For the final question, in order to probe the group about my style, I asked the following: **Q5. To assist with further personal development and understanding, outline your thoughts about the approach, professionalism and skills of project facilitator, Yvonne Gray.** I also sought the assistance of the Executive Assistant to write up all of the Questionnaire feedback to ensure anonymity of the replies. She deliberately did not put any names into the spreadsheet.

The results were very reassuring.

The word *professional* was used seven times, had descriptors such as *very*, *always*, *thoroughly* and *extremely* were used to describe it.

Other words included *enthusiasm, very open, empowered people, open to the group, easy to work with, task orientated, very patient, allowed for fair equal and unbiased feedback, identified people's strengths and utilised these to get the best out of the group.*

Comments relating to the action research process included: *"conscious of the Action/Research model and its philosophy in action", "able to keep us on the track in a clear and friendly way", "she made it possible to learn from this experience, and gave us good information every step of the way", "excellent approach in providing support, understanding and process" and "never pushed own ideas".*

I appreciated the feedback that I was seen as *"open minded and inclusive of everyone", "will always listen to people even with the most off the wall ideas"* reflects the other comments, that *"sometimes can be too focussed" and "you don't have to always be so user friendly"*.

My input did not go unnoticed, with comments such as *"has done a terrific amount of work on behalf of the group!"* and *"This was the key element in achieving the outcome as Yvonne, more than anyone, was conscious of the Action/Research model and its philosophy in action"*.

The completion of the two final evaluation exercises, the evaluation reflection discussion and the action research evaluation questionnaire, symbolised the end of the research data gathering. The resulting information provided the data to address the research question.

CHAPTER 5

DATA ANALYSIS

In answering the research question, “*Can Action Research methods usefully inform the development of a national Instructor Induction process within a PTE?*” I sought to evaluate the effectiveness of using action research methods to establish an instructor induction package which could be used nationally within the New Zealand Red Cross.

The data gathered to answer the research question included data from the action research phases (reconnaissance, implementation and evaluation) and were obtained from three action research cycles: *plan, act, observe/report and reflect/evaluate*, as they related to each of the phases.

As I was aiming for a robust approach to data analysis through triangulation, I gathered information from three main avenues: the literature review; data from the collaborating group reflective practice, evaluative discussions and an evaluation questionnaire; and data from my autobiographical journal.

Data were analysed for patterns or divergences in three main steps: (a) the data were grouped into categories (see section 5.1) as they emerged from the information, the comments were graphed into totals for each category for each cycle, (b) the meaning of the data as they related to each of the phases, was discussed, and (c) the categories data were grouped into three themes (see section 5.2), the autobiographical journal entries were integrated and supporting information from the literature was incorporated

5.1 DATA CATEGORIES

From my reflective journal, April 08

“If you have built castles in the air, your work need not be lost: This is where they should be. Now put the foundation under them” Henry David Thoreau.

The question is how?

Cycle One *reflective practice notes* provided the nine data compiled categories which were also used for Cycle Two *reflective practice notes* and for Cycle Three *evaluative reflection discussion notes* where discussion replaced written reflection. Cycle Three *evaluation questionnaire notes* were also collated. The graphs below (Figure 5.1) indicate the number of comments made in each of the categories:

1. Appreciated and enjoyed day, looking forward positively
2. Personally gained, learned, professional development
3. Need and support for research; progress; product
4. Positives - A/R Process
5. Positives - A/R Team
6. Initial concerns transitioning to positive outcomes
7. A/R - Improve, Time constraints
8. A/R - Improve, Process constraints
9. Improve - Other comments.

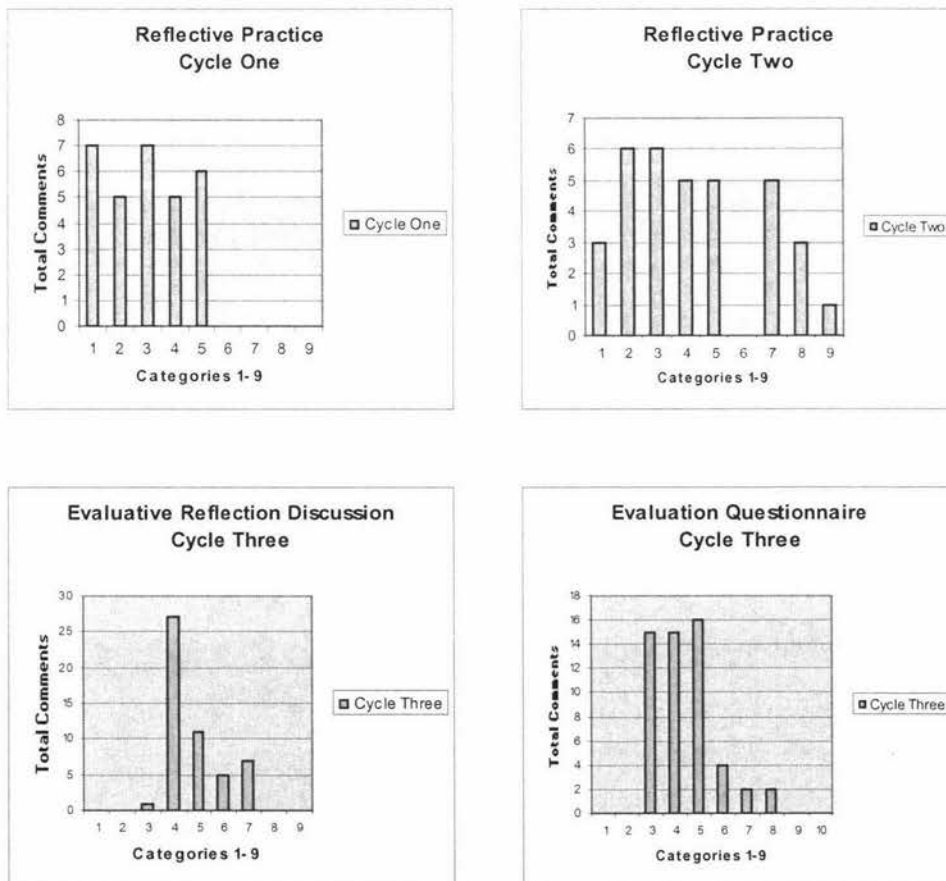


Figure 5.1: Categorized Comments Received Each Cycle

The four graphs in Figure 5.1 indicate the number of comments made for each of the categories during the cycles. Whilst the comment descriptions or values are very important and are discussed for each category below, only 12% (20 of the total of 169) related to improvement suggestions and, of these, nearly three quarters (14) related to time-factors due to the volume of work required.

The graphs below (Figure 5.2) show the significant number of positive responses (88%) to using action research methods to solve the induction problem.

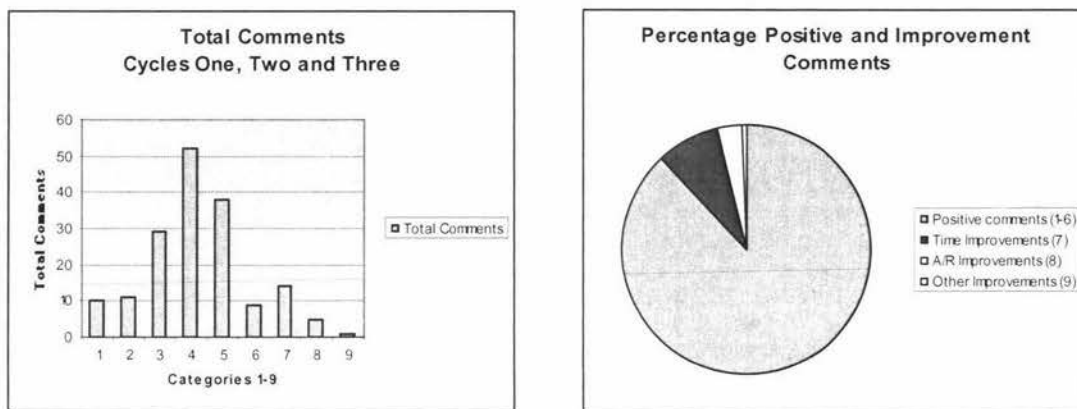


Figure 5.2: Totals - Category and Percentage Graphs

Placing all the data from the phases into a category table provided a master list from which I could then develop the graphs and compare and contrast the results more conveniently. The results divided into four main themes.

5.2 DATA SUPPORTING THE THEMES

From my reflective journal, April 08

Sorting all the evaluative information and feedback into some sort of user-friendly order was not so easy. The phases and cycles, while systematic, in reality are still somewhat messy and themes diverse. The quantity of feedback makes it additionally complex.

The nine categories divided into four themes as shown in Table 5.1.

These included: Professional development, Induction and Distant learning, Action Research Methodology and Improvements. Each will be discussed separately.

Table 5.1: Data Themes

Categories	Themes
<i>Category 1. Appreciated & enjoyed day, looking forward positively</i> <i>Category 2. Personally gained, learned, professional development</i>	Professional Development
<i>Category 3. Need & support for research; progress; product</i>	Induction and Distant learning
<i>Category 4. Positives - A/R Process</i> <i>Category 5. Positives - A/R Team</i> <i>Category 6. Initial concerns transitioning to positive outcomes</i>	Action Research Methodology
<i>Category 7. A/R – Improve: Time constraints</i> <i>Category 8. A/R – Improve: Process constraints</i> <i>Category 9. Improve:- Other</i>	Improvements

5.2.1 Professional Development

From my reflective journal, Nov 07

The electronic whiteboard, coloured paper, coloured pens and flip charts became my best friends, how else would I cope with the plethora of feedback after each workshop – it was huge – fantastic meaty stuff -- lots to think about, heaps to remember to add ... I'm sold on the group brain and everyone working together -- people seem to be enjoying the process, a trusting and learning lots from each other and are loving to share -- it's just great.

“Every composer knows the anguish and despair occasioned by forgetting ideas which one has not had time to write down” Hector Berlioz

Category 1. Appreciated and enjoyed day, looking forward positively

Category 1 *reflective practice notes* featured in both Cycles One and Two, with ten positive comments of appreciating being involved in the research, enjoyment, satisfaction with food and venue, looking forward to future meetings, and the distraction from everyday work in Cycle Two.

Whilst these comments were unsolicited, enjoyment, environmental comfort and venue satisfaction were important for fostering learning for the collaborating group. The benefits of offering a safe and welcoming learning environment for staff also included

increased camaraderie and staff member enthusiasm. Once an effective learning environment is provided, learning is likely to be maximised - and if coupled with “hands on” experiential learning, ongoing professional development is likely to achieve very positive results.

Category 2. Personally gained, learned, professional development

Eleven positive comments about personal learning were highlighted in the *reflective practice notes* such as support, confidence to deal with any instructor issues, being appreciative and having spin-off learning - and the interesting topics presented adding to personal training and education were mentioned in Category 2 for Cycles One and Two.

The reviewed literature both supported the idea that by engaging in action research and action learning processes an educational organisation would be stimulated into improvement, and provided justification with examples of the theories successfully used in practice (Johnson, 2008; Kember, 2000; Kolb, 1984; Pedler, 1997; Weinstein, 1995; Zuber-Skerritt, 1992b).

Themes in the literature pointed to successful change and professional development resulting from people’s reflecting on their personal thought processes and practices, which led to the systematic reflective practices being deliberately built into the meeting structures and evaluative processes.

It was acknowledged that, as with any learning, each participating individual within the specific research context would create his/her knowledge from his/her own reference point. Experiential learning theory directly supported the notion of assisting an individual’s development. Action learning, with its particular strength for helping solve complex problems, was enhanced by the facilitating approach of collaborative business management practices.

Rosaen & Schram, (1997), who proposed a concept of interrelated layers within the action research framework, place individual perceptions, actions and decisions in its centre; the committee or research group is the next layer out; “practices” in the second layer out and lastly, “contextual aspects” are in the outermost layers. Seeing a broader

“layered” perspective was useful, particularly when considering the influence of the individual collaborating group members and the research stakeholders on the data gathering and evaluation processes.

5.2.2 Induction process

From my reflective journal, Dec 07

We did it - our Induction Workbook is complete (thanks to Rowntree, 1992) with:

- *Objectives - what they DO after the learning*
- *Activities - visible, questions, suggestions inviting them, all meaningful and we can therefore assess progress*
- *Feedback - built in critical reflection, asking to confirm and think again; and feedback/discussions time with their training coordinators/managers*
- *Examples - all true working and real-life illustrations of actual situations our instructors have had to deal with*
- *Clear Layout - flowcharts, sections, easy to find areas of interest, lots of white space, headings, bullet points, icons*
- *Modular - all in one bound workbook, self-contained.*

We asked our learners for their input, gave time frames, built in action words for activities, added culture, organisational history and admin, thanked those involved and gave it the corporate look (thanks to Udelhofen, 2005).

We have used friendly language, a welcoming enabling tone, hints and encouraging words from the team - I am really pleased with it!

And we have our Instructor's Record Book containing essential requirements and sign-off for their personnel file.

The final shuffle of all required induction information into chronological order made sense and the sections readily flowed from this and resulted in a surprisingly good product which looks good with a fancy cover!

Category 3. Need and support for research; progress; product

Support for the research was demonstrated positively in the *reflective practice notes* with thirteen comments indicating the need for a robust outcome for instructor induction, positive progress, the movement from ideas and concepts to something more concrete - all of these were in category 3 of Cycles One and Two. A Cycle Two comment also demonstrated recognition that current processes did not include all required areas.

One comment was included in the Cycle Three *evaluative reflection discussion notes* to the effect that the induction workbook “*Has to be a do-able document, contains a lot of information*”.

Indeed, the Cycle Three *evaluation questionnaire* had 19 comments which identified that the most important outcome or achievement was the induction document. The usable and practical nature of the document which would deliver training in an efficient and effective way, plus the ability to use it nationally and its value to the Red Cross organisation were all seen as important. An enhanced level of professionalism, which would result from the skills and knowledge which it would impart, was favoured as was the presentation which provided the advantage of regular review.

A change in focus was evident in Cycle Three which had comments in only categories 3, 4, 5, 6 and 7.

The notion that a good induction sets a firm foundation for the new recruit's commitment and loyalty was supported by the collaborating team, the key person interview and also by the literature (Meighan, 2000). Second to staff selection, induction processes have a substantial influence on how the new recruit relates to his/her job, and link staff retention to early experiences within an organisation, as well as their relation to staff feeling valued and providing a positive team experience. Quality, motivation and professionalism in the new recruit are strengthened in induction.

The quality of the induction process therefore influences the quality of course presentation and the participant's experience. This research made good business sense. The Induction process was seen to simultaneously facilitate the development of each individual and be relevant to the company's ethos and values.

Choosing action research methods to resolve the induction issue was favoured with its participation, collaboration and consultation of those directly involved. These ensured that the research was done by, and for, those most directly involved with the problem - and that the results would both influence, and be influenced by, them.

At an earlier meeting colleagues had brainstormed different methods of training to illustrate the wide variety of possibilities. The list included: Instructor's Handbook, checklists, a workbook, action plans, NZQA unit standards leaflets, Red Cross-specific

CD Roms, videos, pamphlets and newsletters, tapes, health and safety checklists, group meetings, training days, slides, photographs, lectures, discussions, questions, buddying, on-line - websites, exhibitions, displays, scenarios, selected activities, and attending another instructor's course. Some of these avenues were therefore considered, and others were not.

The concept of a self-paced, learner-centred and activity-based manual which included all the areas raised, plus systematically addressing the 'must-knows' and "good-to-knows" of the NZ Red Cross would fit the suggested criterion of effective induction. Two influencing factors would be seniors having an input into the design of the package, and an evaluation process to ensure a best practice document (Rowntree, 1992; Udelhofen, 2005).

Additional justification came from much of the information which supported active participation, or "doing", for improvement (Atweh et al., 1998; Carr, 1996; Kemmis & McTaggart, 1988; Kolb, 1984; McNiff, 2001; Miller, 2000; Robinson & Poole, 1990; Stiven, 1997; Usher et al., 1997).

5.2.3 Action research methodology

Category 4. Positives - A/R Process

Reflective practice notes showed a great deal of support for the action research process. Category 4 featured ten positive comments on the action research process in Cycles One and Two, including clarifying processes, motivation, positive change, the plan fitting well, interregional sharing and clarity of purpose, sharing of information, that it was well structured and was bringing it all together. A comment that it was "good to think outside the square beyond what we normally do" also indicated a level of learning.

Cycle Three *evaluative reflection discussion notes* showed a shift in the depth of thinking about the action research process - as would have been expected as the group had by then completed the third cycle. Twelve positive comments revolved around the the benefits of sharing the knowledge of individual group members, ensuring all areas are covered, that the cycle keeps on moving like "a helix rather than a circle", that reflection helps keep everything is track, that a group can start from wherever they are at the time, that the process "ensures the best possible package", that the readings were

helpful and that the action research process looks after the group members' welfare. The last comment was that the action research process was *"Very beneficial – felt enabled to self correct"*.

Additionally, eleven observations were made about the limitations of current induction practices including lack of cohesive induction structures; large amounts of information missed and assumptions made - in particular, the expectation that instructors will *"pick up the required information,"* - the volume of knowledge needed and that *"Instructors are good at taking the "unexpected" in their stride"*. A further comment was that a good induction will go a long way to resolving the current miscommunications or assumptions. Two further suggestions related to ideas contained in the readings relating to mentoring.

Cycle Three *evaluative reflection discussion notes* resulted in 15 positive comments about the action research process which indicated that the group enjoyed it, and said that it worked really well, that it readily moved from step to step, got everyone thinking along the same lines, and that understanding each others' differences was a good feature. Of the 15, two expressed surprise that it worked as well as it did, because initially they could not see how it would come together. A couple of comments concerned how useful the process was and how good the model was, and one comment summed up the user-friendly aspect of the process, *"Great that a group like ours has been able to do it"...* Another member wrote, *"Would have liked it a few years ago"* and another liked the fact that *"Minds have gelled"*.

The explanation of, and introduction to, action research at the start of the project seemed to be important. With few of the team knowing about action research the comment, *"Setting the scene at the beginning was really important"* showed that obviously, a need had been addressed.

Two questioning comments were made about not knowing how well the new induction workbook concept will work until it is actually used.

One insightful comment about the essence of action research and its value for improvement was made in Cycle Three *evaluative reflection discussion notes* that, “*To improve we have to change things; and to learn and reflect on the consequences*”.

Further feedback from the Cycle Three *evaluation questionnaire* also endorsed the action research way of working as one of the most important outcomes or achievements of the research, with four positive comments about team members who gathered the information and how their expertise gave greater understanding to others and enabled all to achieved results.

The *evaluation questionnaire* also contained two other affirming comments about the value, appropriateness and outcome of the action research methodology.

When replying to the question, *What aspects of the action research process did you particularly like?*, there were nine replies each with a different slant - including reflection (x3), change, feedback, fieldwork, the analysis, the workbook design segment, and planning, design and reflection. One person stated, “*In particular I was impressed on how soon we gathered the material*”, and another comment related to readings that were analysed “as {they} made thought processes clearer and provided enlightened ideas”.

One person commented that s/he liked “*All of it - I liked gaining an understanding of the process itself. Interestingly I am using this process on another project now with a family member who is doing a difficult paper and it's really helping*”. The transferability of the action research process into different areas is commonly exemplified in the literature, where action research is best done by the community concerned, integrating their meaning and values (Borda, 2001; Denzin & Lincoln, 2000; Gustavsen, 2001; Hall, 2001; Johnson, 2008; Reason & Bradbury, 2001).

Yet another comment supported the use of the action research approach to further Red Cross business situations and stated: “*Seemed a good mix of email, communication and review, versus meeting as a group. Should a cost analysis be included{?}. Look at opportunities for this model in ETC deliberations, e.g. business cases for additional*

courses". Organisational improvement using action research is echoed in the literature (Coghlan & Brannick, 2005; Eisenhart, 2001; Johnston, 2008).

A quotation on action research from Kemmis & McTaggart sums up the theoretical underpinning of action research methods for the research:

"In action research groups work together to change their language, their modes of action and their social relationships, thus, in their own ways, prefigure, foreshadow, and provoke changes in the broader fabric of intentions which characterise our society and culture. To think globally and act locally" (1988:7).

Other authors discuss the importance of the collaborating group members' use of their own ways of discussing issues. Zuber-Skerritt (1991:103) observed that jargon in education research papers and books can get in the way of applying theory, and suggested that for research to be useful it needs to be written in language understood by the people using it. The action research team analyses a problem, plans the strategies, takes the action, reflects and observes and completes the critical evaluation.

Reflection is seen as an essential part of action research (Brookfield, 1995; Cranton, 1996; Eraut, 1994; Knowles, Holton 111 & Swanson, 2005; Marland, 1997; Moon, 1999; Pope & Denicol, 1991; Zuber-Skerritt, 1992).

The value of reflection, as demonstrated by the comments made during this research, was critical to its outcome - as were the spiral or helix evaluative processes (Wadsworth, 1997) which fitted comfortably within the group work sessions both formally and informally.

For example, group members asked lots of questions such as, "Does including this concept keep us on track? Have we answered that particular question if we do that? Is there anything else we should do? Are we missing anything? Has that particular situation covered what we intended it to? Should we investigate that to clarify things further? Maybe X would be good key contact for that question? What do we think about that idea, does that fit in our view of things? How could we relate that to induction?"

Ongoing and self-evaluation ran alongside the formal evaluation processes, and formed my personal evaluation mechanism where, through my Research Journal, a self learning and revelation process evolved.

Category 5. Positives - A/R Team

Cycle One *Reflective practice notes* had six positive comments about the action research team (group work, intelligent discussions, everyone on board), and an insightful comment including “the positive group environment with fair, equal and non-judgemental team members”, and Cycle Two *Reflective practice notes* had five positive comments which also indicated good support for working together, including comments in which *group cohesion, trust and feeling accepted* featured.

Stringer (1996:159) suggests that the researcher take on a “research facilitator” role, (particularly within a community-based action research programme) where the researcher coordinates or facilitates and provides leadership and direction for the research. I consciously encouraged people to express their ideas and opinions, to hear and consider others’ views and to provide feedback, in the hope this these practices would lay the foundation for robust outcomes. Included in the research plan was an invitation to those affected by the changes to give feedback. Staff had the opportunity to participate in the change process in the anticipation that this would facilitate their endorsement of the end results.

One comment summed up the 9 positive comments from Cycle Three *evaluative reflection discussion notes* which all supported collaboration. This was: “*The benefit of working as a group, using everyone’s different talents/understanding/input really ensured we would get it done well*”. These notes also included two statements about how good the experience of working together in a group was, and that the group process had been “really good”.

Some further comments related to the beneficial aspects of a supportive environment; the values of the group’s thinking and recording activities together; and seeing the learning process in a similar way to inductees’ learning process, will be discussed in section 5.2.

It was not surprising to note that Cycle One *Reflective practice notes* did not feature any further comments for categories 6-9 because Cycle One was focussed on identifying the problem, discussing options, setting the research scene and organising consents.

Similarly to category 5, feedback from the Cycle Three *evaluation questionnaire* also endorsed the action research collaborative team-work approach as another of the most important outcomes or achievements of the research, with 16 positive comments about the spin-offs such as team building, consensus on key deliverables, the equal, fair and unbiased way of canvassing all views, the satisfaction of the sharing and cohesion within the group.

All improvement involves learning, and the collaborative action research framework promised to be an excellent tool. Further confirmation came from the literature where much of the information supported active participation and group-work, or “doing”, for improvement (Kolb, 1984; Pedler, 1997; Stiven, 1997; Weinsten, 1995; Zuber-Skerritt, 1992).

Category 6. Initial concerns transitioning to positive outcomes

No entries were added for Cycle One or Two of the *Reflective practice notes*, however Cycle Three included five comments which were initially stated as concerns but which later became positive outcomes. Resolution of the concerns through the action research process is evident and this was seen as both a beneficial and constructive aspect. In each case, the resolution occurred through moving through the action research process.

The first area mentioned was a feeling of confusion where three comments were made that the process had been confusing, particularly at first. One person noted that the gaps were filled by the end of the process; another said that it was probably “*one of those things you have to work through to get the product*”, and a third said that working through the plan “seemed to fill in the gaps chronologically.”

The second area, mentioned twice, was the difficulty in understanding or making sense of the readings. Both people said that as they moved through the process, and having applied the learning, the readings seemed to fit and become “alive”.

The third area, which was initially mentioned as a concern which was later resolved, was time factors. One person had thought that the length of time between meetings was a barrier to moving forward, but noted that on completion s/he was excited; and another said that s/he was surprised to have achieved the timeline and the result was excellent.

Cycle Three *evaluation questionnaire* also included two negative comments about the readings, one of which was resolved as it became clearer at the project conclusion, and the other indicated that someone was “*not particularly keen*” on reviewing the literature at first. This member also found it ‘*slightly tiresome*’ reviewing some areas of the content detail. The feeling of being daunted about the whole process was solved for another member as the group generated positive results.

My own reflective practice had become an obvious strength of the action research process, especially to resolve concerns. On three separate occasions during the research reflection solved an apparent hiatus caused and confused by complexity. The first time was concern about the “what ifs” of the research and its success; the second was, “How would I deal with ‘sensitive’ and ‘negative’ information?” and the third concerned presenting and analysing the overwhelming quantity of data. On each of these occasions the deliberate act of journal completion provided a way forward.

5.2.4 Improvements

From my reflective journal, April 08

The final shuffle of all required induction information into chronological order made sense and the sections readily flowed from this and resulted in a surprisingly good product which looks good with a fancy cover!

... I recall a tutor once saying “all viewpoints are valid, even one piece of negative feedback can assist with improvement”

Category 7. A/R – Improve: Time constraints

In terms of improvement Cycle Two *Reflective practice notes*, five comments revolved around time pressure, the importance and need for more time to adequately cover “important topics which deserve respect”. Comments also acknowledged the quantity of work, that it was hard work and that getting up early caused tiredness. Four comments offered the solution of changing to a two-day workshop, however, as one

person stated, “*{Although I know} this could not happen as we do have time constraints*”; these comments on time were not surprising with a challenging agenda and a large group.

Time constraints also featured in two comments in Cycle Three *evaluation questionnaire*. Question 4 was: “*Were there any aspects of the action research process you particularly did not like?*” The first was that the extended time between meetings was too long. The comment related not to the structure of the action research process but rather to how it was implemented. And the other comment related to the difficulty in refocussing after long periods between sessions. Early starts and long days were graciously accepted by all members of our collaborating group.

Time is mentioned by various writers as being an essential aspect for effective collaboration. Stringer states “it cannot be compressed without damaging the essential participatory nature of a community-based action research process.” (1996:74) Time constraints became singularly the most difficult hurdle both for me as research facilitator and project participant and for the team.

I wondered if the research project was too ambitious, too full or expecting too much – the days were very long with travel time built in, however I knew that added hotel expenses would have put the research proposal at risk. The working group’s dedication and attitude meant that we worked with what time we had and I pushed the Agenda items to get the maximum benefit.

Time constraints were singularly the biggest problem raised in the feedback. I remain unsure as to whether or not I could have justified the cost of overnight accommodation for the whole group. Gibbs (1995) discusses the risks to research due to a lack of funds and suggests that best practice developments may not be completed when funds are not available. Harvey also suggests that many employers have an attitude which is “narrowly geared to the immediate task and tied to higher levels” (2007:20). Fortunately the Red Cross had sanctioned this research, and it was agreed that the required work was to occur within normal scheduled meeting times, so no extra funding was allocated.

Category 8. A/R – Improve: Process constraints

Cycle Two *Reflective practice notes* also highlighted changes to the action research workshops as regards the slow start to the day (the day started with some of the group on a late arrival, so those present started the group work) and comments about the enormity of the task at hand, as well as suggestions that detailed goal/s for the day (a map with time frames and objectives) at the start of the day would all have been helpful.

The suggestion that I could have been clearer about what would occur during the day caused a dilemma. I wanted to be open to go with the group and for the group to have input into the direction we were taking. Whilst the agendas itemised key areas the group had identified in the previous meeting, I could not predict the outcomes of the items. In response to a preference for more structure we discussed our objectives and wrote our aims and goals at the start of the subsequent meetings, and I was careful to summarise the progress made within the context of the action research cycle. The summarising process identified our outcomes and achievements and served to refresh the group after long periods between meetings.

The *evaluation questionnaire* response to Question 2, *Were there any areas you believe were inadequately covered or not dealt with satisfactorily?*, had one response which stated that all areas had been well covered but that sometimes areas were gone over again which delayed progress. It is not clear if this comment related to the group work activities, the checking of the product, or the summarising of activities and agendas, however because in general the topic or subject details tended to coincide or converge, there was some repetition as the sections were consolidated to reflect the incoming information and, as the topics were integrated, the listed items were ticked off.

The *evaluation questionnaire* Question 4 resulted in a comment that, *“there were times when it all got a little off track”*, which echoes the words of Haslett et al. who state that *“Teaching, learning, and (nonlaboratory) research are conducted in a world where “mess” and “wicked problems” predominate”* (2002:446). Action research practice involves multiple inputs and views which add to the complexity. Perhaps the complexity was also compounded by the duality of the concurrent participatory and evaluative action research methods.

Coghlan & Brannick, (who, incidentally, name the spiral of cycles as *diagnosing, planning action, taking action* and *evaluating action*, each operating at three levels, namely content, process and premise) discuss “multiple action research cycles operating concurrently” (2005:23) and liken these to a clock with three hands, each moving at a different speed and each representing a different part, (the hour hand representing the project, the minute hand representing the phases, and the second hand representing the specific activity). Also discussed is the concept of action research being not just about problem solving, but also about continually checking, learning and being reflective. It “is learning about learning, in other word {s}, meta learning” (ibid. p. 25).

The experience of the collaborating group was that it seemed that the cycles were not always clean and clear cut. For example, while the group were planning they were also reflecting and observing, and while the group were reporting they were also planning. This multiplicity provided strength for the action research processes, but also a need to be flexible, responsive and adaptive (Atweh et al., 1998).

Wadsworth (1997) emphasised the existence of a variety of formal and informal evaluation processes at many levels. Our evaluative processes informed our planning and provided us with the opportunity to check whether or not things were on track or if the group needed to consider other aspects. This may also have contributed to the comment about “going over things”.

Category 9. Improve: Other

Cycle Two *Reflective practice notes* had one comment about the room temperature and one comment “could not think of anything bad”. Environmental conditions are an important part of any learning situation, and the air conditioning situation, unfortunately, was not the easiest to modify in this instance.

Four comments in response to Question 2 *evaluation questionnaire: Were there any areas you believe were inadequately covered or not dealt with satisfactorily?*, were listed as “n” or “N/A”, and one statement which alluded to the limited time available to the member due to other work commitments.

Finally, it must be noted that the apparent absence of Cycle 3 questionnaire information in categories 1 and 2 did not mean that there were no comments in these categories. Rather the reason is that these questions were not included in the questionnaire which was written early in the research process at the time of seeking ethical consent - and the categories became illuminated only when the collation of the data had been completed. Many of the comments about appreciation and personal learning are contained in the other categories of the *Evaluation Questionnaire*, particularly 4 and 5.

The large percentage of positive comments reassured me about the suitability of the action research process, but equally the low volume of constructive and negative feedback was also reassuring. Reflection on the information has led to assurance that this was a positive way forward.

CHAPTER 6

FINDINGS

6.1 FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

From my reflective journal, Sept 07

Historically meetings had a tendency to focus on the facts, figures and technical aspects, and were organised in a business-like manner. Formally introducing a time of observation and reflection, talking through feelings and working together to integrate ideas and insights, and bringing together future vision was a more balanced approach. I am also intrigued about the statements on researcher influence on the research question and will be actively mindful of this throughout my facilitation.

I am enjoying the experience of being a participant and consumer of research, as well as an educator/facilitator. Prior to the 'reconnaissance', I sketched out a global view of the research and how I would learn from it.

This brainstorm validated my initial feelings about action research and the reasons I chose this adult education research as my preferred study choice.

6.1.1 Findings

This research was launched on the assumption that the action research approach would work equally well within a PTE with multiple core activities as it is reputed to work in other educational and organisational settings. The literature strongly indicated that a collaborative action research framework would prove to be an excellent tool for improvement.

Action research, as a concept and process, provided the results for which I had hoped. The process proved to be relatively straightforward, mainly because of the commitment and goodwill of those involved, and the outcomes (the value of working systematically and collaboratively to resolve an educational issue, useful professional development, increased knowledge and skills gained through group sharing) were viewed very positively by the collaborating group members. However, it was not entirely unproblematic. By its very nature, action research and action learning are subjective and contextual.

The appeal and strength of the action research process, its flexibility and applicability, also added a level of confusion for the collaborating group because there was no defined “recipe” to follow. Time pressure due to the volume of work and time delays between meetings was seen as the main issue of dissatisfaction with the process. Nevertheless, the volume of positive feedback and expressions of appreciation and satisfaction with the results far outweighed the feelings of confusion and comments about lack of time.

The important aspects of this research were the outcomes and results of the collaborative processes.

The collaborating group had designed a national Instructor’s Induction process in which distance learning protocols were incorporated and where the aim was an educational outcome which provided appropriate instructor induction and which offered both factual knowledge, and learning at a deeper level. Working collaboratively to review and integrate distance learning and teaching best practice principles, plus working through the cyclic process, provided members with valued professional development.

The collaborating group reflections had not only suggested the research produced workable and practical solutions and quality improvement of the Induction processes, but also that the methodology provided an opportunity for group members to learn about the learning process. The “meta learning” (Coghlan & Brannick, 2005:25) which had provided effective professional development, resulted from members sharing how they did approached aspects of learning and teaching, and from reflection.

The collaborating group, who in this research context were themselves “learners”, gained experience, ideas and knowledge by working with their colleagues. Added skills for problem-solving resulted from seeing the results of the action research process, and they experienced the value of reflecting on their practice through involvement in the evaluative and reflective activities and discussions. The process ensured and strengthened accountability and increasing professionalism (Zuber-Skerritt, 1992).

The action research data collection methods provided a valuable process to guide the collaborating group throughout the journey and the experience offered a new way of working, an ethos which was both welcomed and enjoyed.

Initially, when the research was commenced the working group planned to complete at least two Action Research Cycles, however, in reality Cycle 1 involved the first meeting because it included all parts of the cycle (plan/act/observe/evaluate), Cycle 2 related to Meeting Two and Cycle 3 related to the Meeting Three and also included the final reflective and evaluative activities. The final report writing completed another cycle, but it was the unplanned additional cycles which developed as we spontaneously working through unplanned diversions which are of most interest.

The group activities generated what I would call many mini-cycles within each main cycle. For example - addressing each problem or idea that arose was planned (what? where? who? when?), then actioned (data sourced, gathered and collated), then observed (reported, discussed and integrated by the group) and finally reflected on (agree/disagree, important/unimportant, valued/ not valued, changes/additions).

Examples of problems or ideas to which we were reflexive included three general groupings, namely, Literature Review, Meetings and Reflective Practice. A full summary of each mini-cycle contained within each main cycle is shown in the Research Time-line (Appendix B1). Each problem, idea or question was dealt with fully as it arose by observing the action research approach - plan/act/observe/evaluate.

For example *Literature Review* included such things as: What constitutes an expert teacher in our context? What would be included in a self-paced workbook? What about mentoring? *Meetings* included: What does an expert outsider think of our work? What does our stakeholder feedback show? What do our instructor appraisals indicate? What are the different learning outcomes from a management, tutor's or learner's perspective? What value do new instructors put on current practice? *Reflective Practice & Journal* included such things as: What will be included in the questionnaire? How can we integrate holistic, interconnected learning concepts? How could we incorporate reflection into Instructor induction?

Consequently each problem or idea was separately resolved by systematically using a “mini-cycle” of the action research approach - that is, “mini-cycles within the cycles” or “mini helixes within the main helix”.

I conclude that these “mini-cycles”, which develop in response to ideas or issues as they arise (i.e. useful and important diversions), is at the centre of the feelings of complexity, confusion or “messiness” experienced at times by some group members. I also note that any feelings of confusion later were reported as resolved which also suggest that the process worked well.

Judging the research by using the positive collaborating group comments and professional development as the criteria, demonstrates success.

Judging the research using criteria suggested by Reason & Bradbury (2001) would also indicate a high degree of success, namely that we developed a praxis of group participation and cooperation, we adapted our processes according to need and were reflexive in our approach, we had a concern for practical outcomes, we embraced and extended our knowledge and integrated a theoretical component, and we engaged in a significant study which resulted in new and long lasting change within the organisation.

Whilst the research has formally finished, the ongoing and scheduled evaluation and review processes which are currently in place for the training quality systems will ensure the adoption of any required improvement of the new resources over time. The two questions which arose concerning the size of the workbook and further feedback from the target group will be dealt with through this annual review mechanism.

6.1.2 Conclusions

The participatory and evaluative action research cycles dovetailed comfortably with each other due mainly to specific pre-programming and focus on separate reflective practice and evaluative sessions.

This research had all the hallmarks of action research from a management perspective as outlined by Gummesson, (2000), which included that it enabled the taking of action and was interactive; it was ethical, facilitated the solving of problems and provided

motivation for change. It also enabled the development of broader understanding and included a variety of necessary data; required corporate knowledge and was undertaken in real time. Finally, it was judged on its own criteria.

The collaborating group worked diligently through the action research processes. Overwhelming support for its value was shown by the collaborating group's reflective practice and evaluations. This suggests that the management style would be highly effective if used in the broader context within any organisation.

However, the research was conducted by a small number of staff training managers and coordinators and relates specifically to their input and experience. In this respect, even though affirmative comments were received about wider use of the methodology, I suspect that this would depend on whether or not the members were motivated to continue to use it.

As well as management benefits, the professional development benefits of using action research were seen broadly on three levels.

The first was that the collaborating group were able to share their knowledge, skill and experiences to build on the induction process with an expectation that this would more likely maximise inductee learning and professionalism.

The second was that the training managers themselves learned much. In terms of their personal professional development they gained from being actively immersed in all stages of the process including the planning; active involvement in the data gathering and assimilation; discussing their readings; and solving problems together using the gathered information. These echo the comments in the literature; as Zuber-Skerritt put it, personal learning increases when "it is personally and consciously initiated, thought out and implemented on the bases of their own needs, rather than controlled from outside" (1992:80). The organisation has gained positively through this personal learning of its managers. Their new skills and learning will be of value into the future on both a personal and organisational levels.

The third is my own personal professional development. Participating in the research from my role within the organisation and contributing both as facilitator and as contributor provided opportunity for my full involvement.

This was, of course, not from a neutral observational level, but rather from the informed perspective of knowing much about the particular social situation. Whilst in my role of facilitator I deliberately maintained a professional and open, inclusive approach, I nevertheless guided the action research through the steps and led within the cyclical or “spiral” framework to ensure completion. The academic perspectives confirmed and reassured me that the collaborating group was “on track”.

Contrary to what might have been perceived by some members, I did not always feel “in control” of the process! However, I was aware that staff involvement was influential in change management success (Reed and Vakola, 2006). I chose two orientations for myself as both participant and researcher, which were:

- To foster an ethos of collaboration, listening to each other, acceptance of individual contribution and reflection, and primarily looking after the well-being of the people involved, and
- To deliberately facilitate our meetings and workshops with an aim of being responsive to group and individual input, being flexible and open to new ideas.

I fully believed in the action research concept and process, but deliberately used both my own and the group’s creative solutions for addressing our problem. The ease of developing the research based on the cyclic model illustrates how user-friendly the process is.

The research evolved in the way it did because the group was actively responsive to presented views and data inputs at the time. Many collaborating group members acknowledged the value of my input, but my involvement was a learning experience for me too. My personal development from this process has certainly given me the confidence to tackle further action research.

I also learned the importance of the act of writing up is not just for recording information but also for developing an intrinsic appreciation and deeper understanding of events and applying meaning to them.

6.1.3 Recommendations

From my reflective journal, Dec 07

“Many educators still contend that the proper way to educate laypersons in the arts is by showing and telling them about the great works. But others in the last two decades have become increasingly convinced that an arts experience must be participatory” David Rockefeller, Jr. !

Where participation is genuine and input fully accepted within an open forum the benefits multiply. All contributions to the process provided effective and useful additions.

I have been every mindful of being positive during every step of the action research process and to all the team members because I really wanted this process to be a special time of learning for them, a time for themselves as they come away from the normal business of their everyday work.

The first recommendation is to be a facilitator-researcher who remains committed to the action research concepts throughout the research process and who has an adequate toolkit to remain adaptive and promote and embrace diversions (or mini-cycles) within the main cycles.

Whilst I anticipated positive results and was aware that at each step the group were likely to provide added and unexpected issues or understandings, when faced with complex or “messy” moments I was tempted to utilise a more directive leadership style. Therefore an intrinsic understanding that the “messiness” would enrich the resulting discussion and activity, and would result in a more robust outcome, as well as being responsive to the group as the research progresses, is important. The ability of the group to be reflexive requires that the researcher has an appropriate toolkit, including, as Stringer and Dwyer (2005) suggest, an ability to work with groups and to cope with stress and time management.

The second recommendation is to “write it down”. My biggest personal challenge was to manage the large inflow of useful information and ideas. My main aim was to

capture all data as comprehensively as I could for triangulation purposes; the data would validate the research.

One comment from the Cycle Three *evaluative reflection discussion notes* summed up the sentiment that writing things down may not always seem important, but actually is: “Putting information on a board and then transferring it into this document has been a fantastic process. Some stuff on the board - interesting that it came into shape to formulate the book”.

Therefore write down all activities, discussions, preferences, conclusions, brainstorm, reflections, evaluations and ideas – capture these in any form that feels right (for example, notes, mind maps, diagrams, tables, lists, journals, formal agendas and minutes); the notes provide a trail, act as a reminder, can be reflected on (repeatedly if necessary) and help to consolidate understanding. Good record keeping is important in the action research process.

The third and final recommendation is to “celebrate and fully involve your team members” authentically. The collaborating group members are singularly the most important asset to the research process. Celebrate their uniqueness and culture authentically. The individuals’ cultures (how they behave, speak, relate and make sense of their world) will add value to the outcomes. Fully immerse and actively involve each member to strengthen the prospects of organisational development.

The deliberate move away from hierarchical and authoritarian approaches is preferred because these modes can result in feelings of frustration and lack of control (Stringer, 1996:19) which is the antithesis of the results I was seeking. Rather, my priority was to avoid confrontation and to find viable solutions through dialogue and group negotiation.

One of the feedback comments suggested that a smaller group might make things flow more quickly, which – of course - could well have been the case. However, in taking this personal stance, I needed to balance the added time involved in collaborative enquiry with the business imperative for fast outcomes and results.

Group collaboration and time for reflection, underpinned with the expectation of a democratic, non-judgemental atmosphere, where all members are respected and listened to, was a very important component in the success of this research.

6.2 LIMITATIONS

From my reflective journal, Dec 07

Henry Ford sets the scene: "If there is any secret to success, it lies in the ability to get the other person's point of view and see things from his angle as well as from your own".

It has been our project, one we have done together; this has been the ethos as we sequentially went through the required steps as a group. Yet somehow I feel like I have "guided it to where it has to go". I will 'open the floor early next year- take a fresh look, be open to ideas as we wrap-up.

I feel a push-pull situation – it is very interesting:

- *Me as QA manager – wanting results, to see improvement, keen to have it work, accountable, credibility of my facilitation/guidance...*

Versus

- *Me as Researcher – my input, guidance, ideas, concepts; part of the team being responsible; trusting in the process and going wherever it will go; accepting risks and letting go.*

The research eventuated in a twofold result, namely, a practical self-paced instructor induction package able to be used nationwide; and an affirmative conclusion to the research question: "*Can Action Research methods usefully inform the development of a national Instructor Induction process within a PTE?*"

Findings from the research are limited substantially to the subjective judgements within the Red Cross context. The research was a subjective experience which explored a specific issue involving a specific context, and which allowed events to unfold and be interpreted by those involved (Stringer & Dwyer, 2005). As McNiff et al. discuss, making a claim and producing evidence to prove it are easy enough, "but, unless other people agree with you, your research will not be regarded as credible" (2003:135).

Whilst Classical, positivist, social science is judged on its reproducibility and usually includes and prefers a "cause and effect" approach, according to Coghlan & Brannick (2005) when considering the quality of the action research paradigm it is important to judge it on its own criteria.

Other writers agree that reproducibility and external validity are no longer considered essential in educational research and that specific contexts and conditions are seen as equally valid (Stringer, 1996). Scott & Weeks (1998) also believe that it is equally valid that action research is interpreted within a specific context, under certain conditions with a given group of individuals and is therefore sensitive to their interpretations.

Importantly, the research needs to show that improvements have been made because of the intervention. McNiff et al. (2003) outline several forms of validation (including self, peer, up-liner (e.g. manager), client, academic and public validation). Validation has been shown internally, and this report moves the process externally.

This research has provided the collaborating group with valuable knowledge and skill about action research processes, it has led to a positive professional development experience for group members and has provided improvement within the organisation. The broader educational community now has an opportunity to consider the outcomes.

A criticism might be that the research was conducted by a small group of staff within a Private Training Establishment and therefore the findings from it are not generalisable. Whilst the group was small, the educational context is similar to many other tertiary organisations operating within New Zealand, particularly those providing training for unit standards on the NZQA framework. The results will therefore be of particular interest for them.

Whilst I acknowledge that the organisation as a whole may remain substantially unaware of the details of this action research, those actively participating in it will be able to see how they contributed to the end result. I believe, however, that this research offers an excellent improvement model for managers and offers interesting information for other organisations, particularly those seeking appropriate answers to their identified problems.

The specific research results will be of interest to those in the business wishing to further improve practice (Pope & Denicol, 1991), and it will also add information to the

general body of knowledge and be beneficial to the action research community (Pedler, 1997; Rosaen & Schram, 1997; Wildman, 1996).

6.3 FURTHER RESEARCH AND QUESTIONS

Whilst the literature indicates that action research processes are being used successfully in a large variety of contexts, there are two main areas that warrant further research.

This research revolved around training and education, and business management within a private tertiary organisation. It would be useful for further action research studies to be conducted within similar tertiary organisations seeking organisational improvement.

Research relating to the direct application within an international society context would also be of interest. Whilst this research was confined to a small group of New Zealand Red Cross staff, the organisation also has a large sector of voluntary workers. Information on action research applications within national voluntary organisations also warrants further research.

Two questions arising from this research continue to be of interest. A comment received on the questionnaire in answer to *Question 3: What aspects of the action research process did you particularly like?* - was: "*Seemed a good mix of email, communication and review, versus meeting as a group. Should a cost analysis be included{?}. Look at opportunities for this model in ETC {Education and Training Committee} deliberations e.g. business cases for additional courses*". The statement indicated support for further use of the process with time-cost issues also being considered.

Organisational improvement using action research is echoed in the literature (Coghlan & Brannick (2005); Eisenhart, 2001; Johnson, 2008).

The second question relates to reflective practice. Previously, scheduled reflective practice has not been part of the New Zealand Red Cross training culture. Generally, reviews and evaluations have included activities such as strategic planning, annual and monthly reviews, and progress discussions at meetings as well as useful informal conversations.

Whilst collaboration has continued to be used for problem-solving sessions for the training managers; systematic integration of reflective practice into the training culture could also add value.

6.4 FINAL WORDS AND REFLECTIONS

From my reflective journal, Nov 07

As a group we have grown, the synergy and flow were felt with positive comments about agreement for the suggested progress and, to my surprise, that all members were happy for sharing of their ideas to be overt and transparent, even their feedback about my contribution. I feel that we have grown, our group has developed a strength within our organisation.

Knowles et al. (2005) suggest that personal growth aspects might lead the reader to the work of other writers (such as Mezirow or Brookfield) however the societal, institutional and individual growth aspects are also considered.

It is really important to me that we foster continuance of this, however I am acutely aware that things cannot and do not remain static; therefore I am also resolved to accept our group cohesion will likely move, along with other changes.

Whilst the results may change in the future, and we will never re-create the same situation, I am ever grateful for our experience, and am satisfied that we have positively solved our immediate problem.

I heard a story today about a man in a rehabilitation clinic for the third time. This time he said: "I'm right, I'm healed, I can now cope - I have the tools". It is true that sometimes the time is not quite right for something new. In our case, all the bits seem to have fitted together-it seemed to make perfect sense!

But, where would I have been without the wisdom of my readings keeping me steady, knowing I was on the right track, realising how to remain true to the A/R process ... The writers who provided the valuable information on how to keep progressing steadily. I call my notes from these sources, my 'Magical Reference'.

I could be forgiven if I mentioned that dealing with the research complexities was, at times, somewhat overwhelming. As Gummesson (2000:16) suggests, action research is "most demanding and far reaching", but my reflective journal and critical friend were what made the difference on a personal level as I sought to resolve the issues.

On a personal note, however, I was pleased with how things had progressed. There was still further work which needed to be attended to as a result of the research, but it had been a privilege to work collaboratively with the team even though step by step I consulted more readings to help me implement the process (not only for the theoretical underpinning of the research but also for the processes around reviewing and reporting). I sought comfort from knowing that our progress was reasonably as would be expected. My autobiographical journal called the readings my “Magical Reference”

In conclusion, the personal satisfaction of completing this research has been enormous. But how could I ever thank the team enough for all their hard work, willingness to participate and their dedicated enthusiasm?

I wrote a thankyou statement in the Instructor Newsletter, and mentioned the outcomes in the Staff electronic broadcast “Red Alert”. And, at the end of the Third Cycle I purchased and wrapped some novelty gifts and we had a fun game, “Do you want to swap your gift with another already opened one” game. The swapping game provided some much needed light relief when the unopened “special” gift (wrapped in a large toilet roll box) was passed back and forth several times. We closed the session with a group lunch.

I have not formally discussed the research with team members since this final meeting, however recently one of the members made the following comments: “The cycle makes a lot of sense, it’s really good; we have to rely on systems to run the business and it’s come up lots of times in everything we do in training; it’s useable and relevant, and I’ve used the skills all the time as a co-ordinator in our development days; I’ve integrated it into my work” and “The reading {Lacy, 2002} is really relevant to the work I’ve been doing with the DVD and other training work”.

As Haslett et al. (2002) puts it, action research “becomes a way of doing things” (ibid., p. 44). The conversation left me feeling extremely satisfied.

AFTERWORD

From my reflective journal, Nov 07

We need to enable learning for our staff. The product has to be user-friendly - we need to pre-test and trial it.

"We adults destroy most of the intellectual and creative capacity of children by the things we do to them or make them do. We destroy this capacity above all by making them afraid, of not doing what other people want, of not pleasing, of making mistakes, of failing, of being wrong" (Redington, 1983:212).

*In further considering development, the above quote from John Holt in his book *Why Children Fail*, (Redington, 1983) is as relevant then as it is today.*

Our instructors, in their learning about their new job, and participants of First Aid courses alike, bring with them, their prior learning experiences.

Knowing about your learners and understanding their characteristics "can enable you to organise adult learners' activities around their backgrounds and aspirations." (Knox 1986:15).

Selecting and sequencing learning materials and creating options to offer learner choice, provided a significant step forward in our planning. Knox's examples of educational materials (ibid, p.108) provided a useful list check to against (e.g. for information, educational, assessment, or optional for interest) and aimed at increasing overall expertise.

In discussing teaching expertise Knox (ibid, p. 41) suggests that teachers of adults need a high-level of subject or content knowledge to enable them to focus more on the subject or teaching complexities, interpersonal relationships, answering or clarifying fundamental questions, providing good role expertise and enabling responsiveness and flexibility.

The instructor feedback which suggested improvements could be made in their initial environmental and learning experiences therefore evaluating the new induction processes was critically important.

The Induction Workbook

Participative action research methods successfully assisted the working group to develop the new induction process.

A summary of the participatory action research activities completed during each of the phases is shown in the Research Time-line see Appendix B1. The table outlines the data gathering methods associated with each of the three action research cycles.

The final version of the Instructor's Induction Workbook was launched for all new instructing staff early in 2008. A new Instructor's Training Record, which outlined all key steps requiring sign-off, was developed and accompanied the Workbook.

The workbook worked chronologically through induction information required by all instructors. The workbook acknowledged people's previous experience and provided new experiences to fill in gaps. Lindeman's adage, that "experience is the adult learners living textbook" (1926:7), has, as pointed out by Miller (2000:71) been strengthened from other writers such as Dewey, Freire and Horton, and also that it is difficult to argue about its validity. Providing a hands-on, practical base for learning and being prepared for what might be expected within the Red Cross context was a priority.

Adults not only bring to the learning extensive experience, but as a tool the workbook used adult teaching practices grounded in adult experience. David Kolb's writing (1984) influenced the addition of experiential learning in practice, by valuing educational methods and activities such as games, puzzles, simulated scenarios, role-play activities and case studies. The action-based educational approach included learning from cluster groups, 'here and now' exploration of thoughts and feelings, and tutorials (professional development) or group work to enhance learning opportunities.

Postmodernist writers, who offered interesting perspectives for innovative approaches see changes to the traditional experiential learning conventions which embrace a multiplicity of concepts and disciplines (Merriam & Caffarella, 1999; Kilgore, 2001). The workbook also incorporated diverse learning methods and opportunities such as using the internet, built-in reflection times, question and answer, and collegial contact.

Inevitably adult learning is a multiple-faceted and "complex" phenomenon. The *New Zealand Red Cross Instructor Induction Training Workbook*, developed for use within the organisation, aimed at incorporating appropriate learner centred, activity based, adult education processes (Lacy, 2000) in a friendly, self-paced format. Quality management processes and future evaluations will fine tune it.

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Appendices

Appendix A1: MUHEC Information Sheet

[Print on Massey University departmental letterhead]
[Logo, name and address of Department/School/Institute/Section]

INFORMATION SHEET

Project Title:

“Can Action Research methods usefully inform the development of a national Instructor Induction process within a PTE?”

This Information Sheet outlines the above *action research evaluation* thesis project and provides information for collaborating group members. I invite you, as part of the NZ Red Cross Regional Representatives group, to be involved in an evaluative action research project. If you agree to participate please fill in the attached Participant Consent Form and post it back to me. Please also feel free to call me or either of my supervisor/s if you have any questions or require further information.

1. Researcher’s Introduction

- I will be the principal researcher for this project. My full contact details are: Yvonne Gray, NZ Red Cross, PO Box 12-140, Thorndon, Wellington 6144, phone 04 472 3750 ext 261, Email yvonne.gray@redcross.org.nz. I hold a Nursing and an Adult Education degree, and a business diploma. This evaluative research will form part of a Master’s Thesis in Adult Education.
- The Supervisors for this project are Gloria Slater and Nick Zepke, College of Education, Massey University. Phone 06 801 5799. Email g.r.slater@massey.ac.nz; N.Zepke@massey.ac.nz. The two Supervisors are experienced lecturers at Massey University and are well versed in research procedures. Both Supervisors have viewed, discussed and commented on the Research Proposal Application.

2. The Type and Purpose of the project

This research project will *evaluate* the use of participatory action research methods used during the development of a national Instructor Induction package for the NZ Red Cross.

I chose this research topic because it will provide a more detailed evaluation of the value of the training management team working together collaboratively to solve problems.

As you know, each year as part of our planned quality improvement, the Red Cross develops a part of the training business. The improvement plan identified the 2007 priority was Instructor Induction processes. The project goal is to develop an appropriate Induction package which can be successfully used nationally, and the work project has been signed off by Graham Wrigley, the First Aid Portfolio Manager.

Members of the Red Cross Regional Representatives group have agreed to participate in the Induction development project. We will work collaboratively to develop a national instructor

induction package by end of 2007, and to consider all feedback by mid 2008. The majority of the work will be completed during usual allocated meeting time; however some meeting preparation, feedback and note checking may also be required. As principal researcher for this project I will be an active part of the collaborating group.

Additionally, data will be collected to evaluate the collaborating team process. Data for this *evaluative* research project will be collected from the collaborating group, autobiographical reflection and the literature. The *evaluative* action research project will evaluate how well this participative collaborating process worked, and its suitability for use in further projects in the future. This *evaluative research* is the subject of the thesis.

3. Participant Recruitment

All Regional Representatives, as part of the group's normal work, are able to take part in the action research collaborating team work project to develop the Instructor's induction package.

Additionally, I invite all Representatives to voluntarily opt in to taking part in an *evaluation* of this collaborating team work project development process. This *evaluative* process will take place as separate meetings which will be held within the scheduled Regional Representatives meeting times. All participating members who agree to take part must sign the attached **Participant Consent Form** and return it to me.

Participation is voluntary. If anyone feels uncomfortable about participation in the research process, or wishes to withdraw from the research, they may still be involved by contributing feedback to the work-in-progress documents, or by forwarding written comments or by discussing issues, concerns or ideas with any other member of the research group.

Currently our Regional Representatives group includes nine regional staff members and me from national office. Assuming that all members wish to participate, the total number in the collaborating group will be a maximum of ten.

4. Project Procedures

The Regional Representatives group will work collaboratively using participative Action Research methods, and using two cycles (i.e. plan, act, observe, reflect) as we plan, implement and evaluate the instructor's induction project.

The *evaluative* research will take the form of an action research process to evaluate how well this process worked and whether action research is a suitable process in attempting such projects.

4.1 Data to be collected for this evaluation research project includes:

- Collaborating group discussion notes and reflections
- Researcher autobiographical reflection notes
- The literature review
- An Action Research Evaluation Questionnaire.

4.2 Methods of obtaining data include:

- The collaborating group *evaluation* discussions will follow participation in the action research induction package development process.
- Data gathered and documented from the collaborating group including - notes of decisions made at the group work collaboration discussions and reflections.

- The principal researcher, who is an active part of the collaborating group, will complete much of the literature search, and will co-ordinate, collate and write up the results.
- The Action Research Evaluation Questionnaire will evaluate the action research process at the end of the project. It will be distributed to the collaborating group participants electronically at the end of the project. Participants will be requested to return the questionnaires in hard copy to the executive assistant who will then compile the responses. To maximize confidentiality of questionnaire data the Executive Assistant will sign a confidentiality form.

4.3 Data storage and disposal include:

- All data will be collated onto computer and excel spreadsheets. Data will be numbered to avoid identification, and to ensure confidentiality. No personal information will be included.
- Research data will be stored in a filing cabinet and on computer at the National Office, Wellington and at the home of the researcher during inputting and collation. No tapes, videos or images will be gathered.
- Consent forms will be stored separately, in a locked filing cabinet at the office of the Massey University Supervisor, Palmerston North.
- Original data information and consent forms will be destroyed using confidential destruction methods after 5 years.
- The supervisor/s may view data and findings and will sign confidentiality agreements.

5. Participant involvement

Anticipated time commitment:

- Principal researcher to provide much of the project researching and documenting.
- Regional Representatives input will be incorporated at scheduled meetings and will involve approximately **8 meetings with the following time components:**
 - The induction package development **using *participative action research methods* to collaboratively work through the induction problem: A 3hr planning meeting, two full day development workshops, and one 3hr meeting to address the induction package evaluations, as well as 3x 2hr meeting preparation/note checking time. And**
 - The thesis ***evaluative action research*** discussions which members will opt into includes: **2-3x meetings of approximately 2hrs, depending on requirements and by negotiation with the group.**

6. Participant's Rights

You are under no obligation to accept this invitation. If you decide to participate, you have the right to:

- decline to answer any particular question;
- withdraw from the study (specify timeframe);
- ask any questions about the study at any time during participation;
- provide information on the understanding that your name will not be used unless you give permission to the researcher;
- be given access to a summary of the project findings when the project concludes.

Signing the Massey University Participant Consent Form:

All participants in the evaluative research project are required to sign the enclosed Participant Consent Form. If you agree to be part of this project, please sign and return it to me as soon as possible using the attached self addressed envelope. The Consent Forms will be held in secure storage at Massey University for the required 5 year period.

7. Project Contacts

I invite all participants to contact the researcher and/or supervisor/s if you have any questions, please see contact details above.

Also, if at any time you feel any job-related stress as the project proceeds, please either let your manager or me know so we can talk the issues through with you.

8. Committee Approval Statement

This project has been reviewed and approved by the Massey University Human Ethics Committee: Southern B, Application 07/26. If you have any concerns about the conduct of this research, please contact Dr Karl Pajo, Chair, Massey University Human Ethics Committee: Southern B, telephone 04 801 5799 x 6929, email humanethicsouthb@massey.ac.nz.

Thank you for considering this invitation to be involved in this proposed research. If you have any further questions or want to discuss anything further, please don't hesitate to call.

Signed

Yvonne Gray
Quality Manager, Training
NZ Red Cross
Phone: 04 472 3750 ext 261
Email: yvonne.gray@redcross.org.nz

Appendix A2: MUHEC Participant Consent Form

[Print on Massey University departmental letterhead]
[Logo, name and address of Department/School/Institute/Section]

Project Title:
“Can Action Research methods usefully inform the development of a national Instructor Induction process within a PTE?”

PARTICIPANT CONSENT FORM

This consent form will be held for a period of five (5) years

I have read the Information Sheet and have had the details of the study explained to me. My questions have been answered to my satisfaction, and I understand that I may ask further questions at any time.

I agree to not disclose anything discussed in the Collaborating or Focus Group.

I agree to participate in this study under the conditions set out in the Information Sheet.

Signature:

Date:

.....

Full Name – printed:

.....

Appendix A3: MUHEC Confidentiality Agreement

[Print on Massey University departmental letterhead]
[Logo, name and address of Department/School/Institute/Section]

Project Title:
“Can Action Research methods usefully inform the development of a national Instructor Induction process within a PTE?”

CONFIDENTIALITY AGREEMENT

I (Full Name - printed)

agree to keep confidential all information concerning the project: *“Can Action Research methods usefully inform the development of a national Instructor Induction process within a PTE?”*

I will not retain or copy any information involving the project.

Signature: **Date:**

	<ul style="list-style-type: none"> • Workshop discussions & results • Reflective practice integrated • Working group members individual & group reflections • Journal notes • Progress, gaps • Consider next steps and replan • How do we get buy-in of instructors? Are we going too deeply? • Are the members committed? 	<ul style="list-style-type: none"> • Collaborating group work – changes? • Value of Action Research • Check any changes to critical question/project; did we raise personal issues; replan, consider where to from here • Discuss with critical friend • Supervisor’s comments • Complete Journal entries throughout cycle 	June–July
2. Intervention – Cycle Two Methodology; Methods; Data Gathering; Meeting Two			
Plan	Literature Review <ul style="list-style-type: none"> • Readings planned and disseminated • Action research focussed information Meetings <ul style="list-style-type: none"> • Plan Meeting Two Reflective practice & Journal <ul style="list-style-type: none"> • Meeting Two agenda • Format/outline proposed action details • Collaborating group discussions • Plan meeting formats and action • Discuss concerns/ideas • Justify what to measure and How? 	Literature Review <ul style="list-style-type: none"> • Readings confirmed – Action research, reflection, mentoring Meetings <ul style="list-style-type: none"> • Plan reflective practice Reflective practice & Journal <ul style="list-style-type: none"> • Formal • Check time-line • How will this affect our professionalism • Who do we keep informed and how? • Identify focus and data gathering processes • Supervisor monthly meetings. 	Apr–Jun 2007
Act	Literature Review <ul style="list-style-type: none"> • Readings confirmed & delivered – professional development; packages, quality Meetings <ul style="list-style-type: none"> • Collaborating group Meeting Two • Objectives identified • Members present readings & integrate • Exit Interview/s; appraisal feedback; new instructor feedback; • Expert teacher – values and concepts • Three viewpoints – Mgr, tutor, student • Instructor’s input at meetings • Stakeholder feedback Reflective practice & Journal <ul style="list-style-type: none"> • Consider discussion notes • Good, bad, change reflective practice 	Literature Review <ul style="list-style-type: none"> • Review facilitation methods • Organisational Change & Business A/R Meetings <ul style="list-style-type: none"> • Cycle Two, Meeting Two held. • All notes and workshop activities and results documented and disseminated for comment • Triangulation, potential barriers, action research implementation Reflective practice & Journal <ul style="list-style-type: none"> • Integrate any time-line changes • Good, bad, change reflection • Identify and integrate other data sources. • Critical friend and collaborating group input • Complete Journal entries 	Apr–Dec 2007
Observe Report	Literature Review <ul style="list-style-type: none"> • Write up and consider Thesis writing Meetings <ul style="list-style-type: none"> • Readings responses documented • W/B Sections/topics revised & agreed • Write-up includes communications with working group, manager • Write-up Meeting Two notes, workshop results and group work, brainstorming exercises Reflective practice & Journal <ul style="list-style-type: none"> • Consider holistic approach & “inter-connected learning” 	Literature Review <ul style="list-style-type: none"> • Notes on each reading as presented and include “how these relate to our context” Meetings <ul style="list-style-type: none"> • Meeting Two – full notes written up and disseminated to collaborating group Reflective practice & Journal <ul style="list-style-type: none"> • Consider feedback from reflection exercise, particularly what was identified as needing improvement (e.g. objectives summarised) • Consider Supervisor’s comments • Journal entries 	May–Dec 2007
Reflect Evaluate	Literature Review <ul style="list-style-type: none"> • Large volumes to consider • Tick off all points when integrated Meetings <ul style="list-style-type: none"> • Careful and methodical steps needed Reflective practice & Journal <ul style="list-style-type: none"> • Have I thought broadly about research perimeters? 	Literature Review <ul style="list-style-type: none"> • Use APA referencing; compare and contrast authors; identify major issues/conflicts; link main ideas to theory. Meetings <ul style="list-style-type: none"> • Value of readings – issues arising • My role; progress – others taking exercise • Value & accuracy of research topic 	May–Dec 2007

	<ul style="list-style-type: none"> • Reflective practice feedback integrated from Meeting Two; are there other areas to add or lists to address? • Can we realistically change things? • Discuss and reflect on progress and feedback 	Reflective practice & Journal <ul style="list-style-type: none"> • Address feedback from reflection (time) • Where to from here - replan, any modifications? • Discuss with critical friend • Supervisor's comments • Complete Journal entries throughout cycle 	
3. Evaluation – Cycle Three Meeting Three; Reflective practice discussion; Intervention Evaluation; Report			
Plan	Literature Review <ul style="list-style-type: none"> • How to coach, mentor, process answers Meetings <ul style="list-style-type: none"> • Meeting Three – bringing it all together • Consider & plan learning record • Consider who to inform and how Reflective practice & Journal <ul style="list-style-type: none"> • Plan all final Meeting Three reflective discussion activity • Plan PAR parts of the research report • How to thank the group 	Literature Review <ul style="list-style-type: none"> • Report reviews; other A/R business or organisational studies Meetings <ul style="list-style-type: none"> • Plan Meeting Three • Plan final reflective activities Reflective practice & Journal <ul style="list-style-type: none"> • Plan all final evaluation processes • Final reflective activity Meeting Three • Final reflective practice discussion • Final Evaluative Questionnaire • Journal entries • Consider framework for final report • Supervisor monthly meetings 	Dec 2007- May 2008
Act	Literature Review <ul style="list-style-type: none"> • Mentoring readings presented and discussed Meetings <ul style="list-style-type: none"> • Collaborating group Meeting Three • W/B Sections checked for completeness • All instructor needs identified under headings; integrate records information • Learning Record written & agreed • All information ticked off • Consider gaps and include • Final values/concepts integrated • Reflective practice integrated • Feedback from pre-test integrated • Complete trial details • External key person feedback Reflective practice & Journal <ul style="list-style-type: none"> • Final reviews of all documents • Conduct final data gathering, questionnaires. • Analyse research findings from qualitative and quantitative data (triangulation) • Product/Manual written, and prepare evaluation. 	Literature Review <ul style="list-style-type: none"> • Research report format, examine and critique methodology and research tools, summarise theories, , Meetings <ul style="list-style-type: none"> • Cycle Three, Meeting Three held. • Final activities, discussions and workshops completed, identify outstanding issues, present what has been influenced or changed, present and critically evaluate results • Thank group Reflective practice & Journal <ul style="list-style-type: none"> • Complete reflective activity Meeting Three • Complete reflective practice discussion • Complete Evaluative Questionnaire • Journal entries • Prepare requirements for final report • Consider summary reporting of findings • Consider effectiveness of the research 	Jan- July 2008 Yr end 15 Nov 08.
Observe Report	Literature Review <ul style="list-style-type: none"> • Have we missed anything? Meetings <ul style="list-style-type: none"> • All Meeting Three meeting notes • Write-up Meeting Three notes, workshop results and group work, brainstorming exercises • Conclusions and limitations considered Reflective practice & Journal <ul style="list-style-type: none"> • Consider Meeting Three reflection information • Limitations of the study • Identify desirable further research • Consider the success of facilitation • Identify any improvements to researcher 	Literature Review <ul style="list-style-type: none"> • Final literature - practical value, dealing with complexities and challenges for business oriented study Meetings <ul style="list-style-type: none"> • All Meeting Three writing up completed and disseminated • Write final report and forward for initial comment prior to summative assessment • Review Time-line/Action Research processes • Complete thanks to members of group, critical participants • Consider all findings and data analysis • Conduct evaluation and compare data 	Feb- Apr 2008 May- July 2008 Sept- Nov 2008

	<p>role</p> <ul style="list-style-type: none"> Identify personal professional development Identify next steps for Induction standards (TQM/policy) 	<p>synthesis and analysis</p> <ul style="list-style-type: none"> Collate & Consider final reflection details <p>Reflective practice & Journal</p> <ul style="list-style-type: none"> reflective discussion and feedback Consider Questionnaire results 	
Reflect Evaluate	<p>Literature Review</p> <ul style="list-style-type: none"> References and citations <p>Meetings</p> <ul style="list-style-type: none"> Final feedback – did we achieve what we set out to achieve? Have we missed anything? How workable is the end product? Were there any other gaps we need to remember during review Identify new insights gained and personal professional development <p>Reflective practice & Journal</p> <ul style="list-style-type: none"> Final reflective practice on process and progress Meeting Three Consider positive outcomes and required improvements Consider and analyse Evaluation Feedback 	<p>Literature Review</p> <ul style="list-style-type: none"> Compare literature to the collaborating group outcomes <p>Meetings</p> <ul style="list-style-type: none"> Identify any improvements Identify results and outcomes <p>Reflective practice & Journal</p> <ul style="list-style-type: none"> Consider and analyse collaborating group final Evaluation Questionnaire results Consider Supervisor's comments Reflect on Research Journal Complete Journal entries throughout cycle Consider final satisfaction. Consider final researcher autobiographical reflection journal notes 	Mar- Nov 2008

Appendix B2: Evaluation Questionnaire Results

Q1. What would you say are the most important outcomes or achievements of the project?

	Induction document	Action Research process, Teamwork
1	working document	opportunity to have input
2	the induction book	team building
3	desired outcomes of the Induction Package	gathering of information and expertise, greater understanding
4	Usable practical induction process	the teamwork that has resulted
5	Standard induction delivery	whilst employing the action evaluation research process
6	good working document	greater understanding
7	will receive support nationally	Group consensus on key deliverable areas
8	a working induction process	Equal, fair and unbiased input
9	increased the scope of the "nationalisation" of resource	All views were canvassed
10	Induction workbook	AIR project way of working achieved an end result in line with the aim of the project
11	give instructors all the required information in an efficient and affective manner	we have all been working together and sharing ideas better than before.
12	finished product an Induction Manual	focus and group work enhanced the cohesion of the group itself
13	There will be a review mechanism	Everyone in the group will be feeling that they had a satisfying amount of input
14	enable new instructors to take on board all the knowledge and skills	along the way I believe the group has learnt so many other things
15	provide an enhanced level of professionalism	
16	revealed skills that were mindful to the project	
Other - now requires field trial and further review following feedback. can see great value in the final product ... valuable to Red Cross to provide consistency. \$ value as a more efficient way of training.		

Q2. Were there any areas you believe were inadequately covered or not dealt with satisfactorily?

	Affirming	Questioning	N/A
1	There was always appropriate. Very good process.	The size of the document and it's target group. Who is it for? What are the aims?	N/A
2	Other: Good process - good outcome.	All areas of the project have been covered well sometimes I think we go over things that have already been decided and this holds back progress.	Uncertain since I was not part of the process from the beginning.
3,4,5			No; Not really; None

Q3 What aspects of the action research process did you particularly like?

Q4. Were there any aspects of the action research process you particularly did not like?

What aspects of the action research process did you particularly like?	Were there any aspects of the action research process you particularly did not like?
<ul style="list-style-type: none"> The sharing of ideas, learning how different areas do things and how fragmented we are from Region to Region. The challenge of 'brainstorming' on the spot. Working with people I had never met. Reflection. Change. Reflection and feedback. Group / fieldwork and analysis. I enjoyed the 'design' segment where we started to create the workbook content, and shape it. The process though detailed and at times difficult to 	<ul style="list-style-type: none"> That there were times when it all got a little off track. No No, part of the process only the available time to put to the project Extended time frames, but nothing from the structure of the process, just how it was implemented for the time project (too long between meetings). The readings at the beginning - more so I couldn't figure how they fitted into the bigger picture.

<p>understand became clearer as guidance was offered. Particularly liked the readings that were analysed as it made thought processes clearer and provided enlightened ideas.</p> <ul style="list-style-type: none"> • All of it - I liked gaining an understanding of the process itself. Interestingly I am using this process on another project now with a family member who is doing a difficult paper, and its really helping. I also enjoyed working alongside this group of people - very diverse, different levels of interest and skills. It was done in a very friendly manner. Reflection is a favourite part of the process. • Planning, design and reflection. In particular I was impressed on how soon we gathered the material. • I enjoyed the research at the start and the group work • Other: Seemed a good mix of email, communication and review, versus meeting as a group. Should a cost analysis be included. Look at opportunities for this model in ETC deliberations e.g. business cases for additional courses. 	<p>However, at the project conclusion became clearer.</p> <ul style="list-style-type: none"> • At first not particularly keen on the literature review. Slightly tiresome reviewing the content detail (in some areas). • Initially the whole process appeared daunting but as a group the different aspects were "teased" out and generated positive results, so nothing that I particularly disliked other than that it was difficult to bring focus back with long time periods between sessions. • Not a dislike - but a detraction - and that was a time available to me to do the work, meaning it felt a bit rushed. Only because of my other work commitments, not because of the structure of the project. • Different regions had very different procedures which affected the planning stage. On reflection some identified problems may have required further action. • No, really enjoyed all of this project.
<p>Other: The size is a bit big. Worried about losing pages, has to be a working document and it's not good if pages or bits go missing.</p>	

Q5. To assist with further personal development and understanding, outline your thoughts about the approach, professionalism and skills of project facilitator, YGray.

<p>Comments listed</p>
<p>Yvonne has done an awesome job, her professional approach to the process has been A+, she delivers on time, is very enthusiastic about what she does and her enthusiasm spills into her facilitation. My only word of advice is that on occasions Yvonne you don't have to always be so user friendly. Thanks I enjoyed the process.</p>
<p>Excellent structure and foundation for the process. Yvonne empowered people to use their ideas and be part of the process.</p>
<p>Yvonne has been very open with the group from the outset. Communication has been good. She is open to suggestion although sometimes can be too focussed. Easy to work with.</p>
<p>Very professional and task orientated.</p>
<p>As always Yvonne was professional in her role of facilitator - she allowed for fair equal and unbiased feedback, identified peoples' strengths and utilised these to get the best out of the group. She compiled to end product - while still representing the views and ideas of the group.</p>
<p>This was the key element in achieving the outcome as Yvonne, more than anyone, was conscious of the Action/Research model and it's philosophy in action. The time between meetings for the rest of us meant that some prior knowledge had faded.</p>
<p>This is the first time I have taken part in this kind of a project and found Yvonne to be thoroughly professional and great at gathering the threads together to create the whole document finally coming together.</p>
<p>Yvonne's approach was skilful in that she had a very clear understanding of the project process, and was able to keep us on the track in a clear and friendly way. She has worked hard to allow us our differences but include us in the group process. Every session was conducted professionally, and the environment safe for each group member. She made it possible to learn from this experience, and gave us good information every step of the way.</p>
<p>Excellent approach in providing support, understanding and process. Always professional. Never pushed own ideas.</p>
<p>Yvonne was as always extremely professional, open minded and inclusive of everyone. Yvonne will always listen to people even with the most off the wall idea's and has done a terrific amount of work on behalf of the group! And is very patient with everyone.</p>