Pre-print draft of Chapter 3 in the 3rd Edition of the Sage Handbook of Action Research
Note – this is a close to final copy – still some minor errors/typos may be present

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The practice of learning history: Local and open system approaches

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'Learning History' is an action research practice. The goal of a learning history is to capture and share what an innovating group has learned. Originally a form of organizational knowledge management, increasingly we see learning histories being applied in support of social and environmental change initiatives. The process involves convening salient stakeholders, i.e. those participants with a stake in the change underway, and facilitating reflection aimed at enabling a future they desire. Uniquely the learning history then provides an artifact, what Winnicott called a 'transitional object', to help users transition from the current state to a desired future that often includes more stakeholders. The learning history is designed to allow recognition of different experiences of what has taken place, and, based on ensuing conversations from multiple perspectives, to facilitate coordinated action for a new future. Such conversations are facilitated through dissemination of the learning history (text and or video) among the primary original audience about whom it's written, and, as importantly, among those who wish to build on the learnings in a new venture but who may be located in other domains. Collective reflection for action lies at the heart of the learning history. Reflection for action relies on learning historians' efforts to gather and share key stories from participant stakeholders.

The original context for learning histories was 'the learning organization' (Senge, 1990) and today the learning history is considered a fundamental of organizational development. In this chapter we also describe a newer 'boundaryless or open system' practice, useful in settings where the learning agenda is less defined by known organizational boundaries. Nonetheless, regardless of context, four elements taken together form the design criteria for all learning history. These elements loosely inform stages of development which will be illustrated below:

1. Multiple stakeholders design the learning history effort around 'notable results'. This term connotes an interest in those outcomes that can include any significant issues and happenings worth deeper understanding. Using notable results, learning history participants are empowered to discuss what has already happened, along with the contradictions and disagreements that may have arisen. In this way, their reflection orients their change efforts toward a desired future.

2. Insider/outsider team members lead reflective interviews in a way that combines practice and scholarship with practitioners (e.g. managers or local leaders) and as appropriate, working with consultants/change agents, and collaborating researchers.

3. Distillation and thematic writing/presentation requires the learning historians to combine research, pragmatic and mythic imperatives to create an interactive artifact (text and/or video) useful in research and practice.

4. Validation and diffusion with original participants individually and in the presence of invited others where there is the opportunity to clarify. Accomplishments are clarified, so too what is needed to make new insights 'actionable' for future stakeholder efforts.

We next present a short history of the learning history practice, describe recent additions and changes and provide conclusions from our reflection upon what we have learned from these enhancements. To provide a basis for our insights, we present two examples of learning

practice, to illustrate the original local (bounded) and the more recent open system (boundaryless) practice, respectively.

Roots and innovation in the practice of learning history

It was nearly 25 years ago that a group of researchers situated at the MIT Center for Organizational Learning, under the leadership of the second author, and specifically interested in learning from experience, first defined the method and practice of learning histories. Their efforts originally focused on supporting organization development. Learning histories were initiated within innovative business units that developed new approaches. Learning history could expand their impact in the broader organization, and finally attempt outreach to a larger external environment of people and organizations interested in learning from these innovators and applying their learning in their own local settings. These early applications of learning histories have been extended to other settings, including the efforts of this chapter's co-authors to organizations and communities promoting environmental sustainability. The shift from the focus on individual entities to multiple organizations has generated new insights that distinguish 'bounded' versus 'unbounded', or open-systems learning histories (Gearty, 2009; Gearty, Huang-Bradbury and Reason, 2013). 'Open systems' learning histories typically chart storylines that extend beyond an organizational focus to a field of action and systems issues. The field is structured by the network of relationships between multiple constituent organizations, agencies and individuals.

Learning across system boundaries

Starting in the 1990s numerous companies sought to learn and apply learning organization foundations of The Fifth Discipline (Senge, 1990). The resulting learning history of AutoCo, a company among the first to adopt a learning history approach to build better understanding of their product development efforts, was published as a document within AutoCo.

Simultaneously it found interested readers as a working paper at the MIT Center for Organizational Learning, and later as the Oxford University Press Car Launch book (Roth and Kleiner, 2000). Each version illustrated successive efforts to cross over to the next level of organizational boundaries, and required attention to the associated concern in contemporary action research for integrating first, second and third person action/research.

Integrating first, second and third person action/research across system levels

The first system boundary that is explored in learning history is the intrapersonal, i.e. at the individual level, which is the locus of first person action/research. Here the process of the reflective learning history interview is carefully designed to enable and encourage reflection on what happened and why. The second system boundary is interpersonal, among insider and outsider learning history team members, which is operating especially in the process of checking quotes in service of 'distillation' and theme creation. Distillation occurs as people reviewing the narrative from interviews, use the qualitative coding approaches of grounded theory (Glaser and Strauss, 1967), to develop and test the usefulness of telling key stories. This is followed by validation which refers to the opportunity to review and edit all quotes, which is a process of second person action research. After the individual and team, the third system boundary is that of the innovative unit as a whole. The learning at this third level of an organizational system is tested and authenticated in the dissemination phase, when the unit as a whole reflects on its collective experience and results in a workshop using the learning history artifact, still in a 'draft' form. It is not until these original participants have endorsed the document as appropriately and fairly representing their multiple experiences and accomplishments that the learning history can be used by other organizations, or levels of that organization. The fourth level engages the wider system. As such it becomes a form of learning for others, i.e. third person action/research. That wider engagement, in moving from

an effort to learn from the people and unit within an organization, is a form of an 'unbounded' learning history.

Stakeholder engagement

What differentiates bounded/local learning histories from unbounded/open system learning histories is not the level of engagement in reaching wider audiences, but the involvement of multiple organizations in projects and activities that are the subject of these writings and the workshop processes in which are used. In looking across all learning history efforts, whether local or open systems, we find the practice of 'stakeholder engagement' to be a consistent item that requires close and critical consideration.

A goal in learning histories has been the engagement of all important stakeholders affected by the activities, efforts, and outcomes of innovative initiatives. Stakeholders play different roles, including sponsorship. The roles that stakeholders play are often temporal, affecting continuity, extension and completion or closure of learning history efforts. We have found these considerations to be particularly influential in determining how easily a learning history effort might be able to cross boundaries (third person action/research). We return to this issue in the conclusion.

Two contexts for the practice of learning history: Local and boundaryless systems

Learning historians can choose which type of learning history, local or boundaryless, is most actionable in their given context. Where there is relative clarity and ability to engage specific representative stakeholders a 'local' learning history is likely most effective. Where the learning sought is more diffuse, often relating to a 'wicked' problem or systemic issues, such as climate change initiatives, then engaging multiple organizations with an open systems learning history may be more useful. Open systems learning histories often involve multiple

artifacts, that are generally more provisional, engaging and less thorough than the 'local' learning history.

The reader is now invited to review the table in Appendix 1 to see stylistic differences. Note that as with all description of learning history we offer 'cleaned up' narratives which cover over the messy and bricolage approach that is sometimes most productive. While the differences may look extensive on the surface, they are nonetheless anchored in similar principles. How these principles are expressed is the learning historian's choice in the context of the aims and resources of the project at hand and following the view that quality action research is being aware of and transparent about the choices the researcher makes (Bradbury and Reason, 2001).

Illustrating the local (aka bounded) learning history

Stage 0: Establishing an insider/outsider team and engaging stakeholders

A large academic medical center framed its leadership education programs for physicians as a strategic intervention aimed at culture change at a time of great change in health care. A learning history was employed to determine how to grow the resource-intensive program. The first author agreed to lead a learning history process and with the program managers invited all internal stakeholders to reflective interviews. In a convening communication she explained that the purpose of the learning history was to:

a) Offer an opportunity for shared reflection on program strengths and goals met,

b) Strengthen the program for future cohorts,

c) Use the learning history process to increase capacity for organizational learning in and for the academic medical center on the specific question of leadership and capacity development.

The learning historian further explained that the learning history process is collaborative in nature ('research with not on participants'), and aiming to promote a snowballing of engagement of participants and sponsors as well as those who are interested in seeing similar or better results for themselves and the organization more broadly. Thus the new cohort of health care provider participants, whose selection was already underway, were treated as important future stakeholders. The goal of the learning history was for all relevant stakeholders to feel engaged in co-designing and furthering the inquiry. Both rigorous and 'reader friendly' findings would speak to multiple stakeholders. Of the 20 pilot participants, clinic department chairs and other key stakeholders who were invited, 90% agreed to participate.

Stage 1: Documenting notable results

The learning history process started in earnest by carrying out an assessment of the program and identifying 'notable results'. This provided for some objectives measures around which learning could then arise. The program designers therefore first commissioned a brief survey of recent program participants: Two of the program's four goals had been clearly met in that individual participants and sponsors experienced value from the program. The goals yet to be met, however, concerned how to align the program in meeting organizational needs through the learning projects and the need for developing alumni learning network in support of learning throughout the large medical centers. In this way, the survey results offered a good starting signpost for the work to unfurl.

Stage 2: Reflective interviews

With the program managers, the lead learning historian created a 50 minute interview protocol and conducted a set of interviews with all key 'insiders' i.e. program participants and those who paid for their participation, namely their bosses, i.e. the chairs of medical

departments. Generally, interviewees spoke energetically about the potential of the leadership program, called Pathways. They saw the need to fill a gap in generating capacity for leadership to respond adaptively as complex demands increased in the organization. One participant summed up for all: 'Pathways was really different from what I was used to in previous learning situations. The faculty were great. The readings too. And most important was meeting peers I didn't know'. Another reflected on the opportunity to see the 'big picture' which allowed him be a better physician: 'The program was eye opening for me – making me aware of the realities of health care delivery and where I fit into the broad scheme of things. It gave me a bigger picture of a more complex, more competitive world'.

There was also widespread recognition that their health care institution had a stellar reputation, but was yet to fully embrace the bread and butter issues of patient satisfaction, quality improvement processes, and its overall effectiveness as an organization for the twenty-first century. In so complex and demanding an environment more organic leadership was readily seen to play a potentially significant role. But, it was not yet an organization given to developing such leadership.

In making the learning history available internally, it became a vehicle to convene all interviewees for a validation of its content with a focus on what might be actionable next steps.

Stage 3: Distillation and thematic writing

The document began with a contrast in colorful images that participant-interviewees had offered in their interviews. The academic medical center had figured in many imaginations as machine-like, behemoth. Individual program participants' images had included 'independent robots' and a 'big concrete bunker' … none of the cultural images offered were positive. In contrast, the leadership program figured as organic, life giving, but small and possibly

overwhelmed. Participants' images for the Leadership Program – e.g. small and living plants – had seemed incompatible. Pitting the contrast in images allowed for a creative response to this apparent disconnect once it was allowed to be voiced in the interviews. Interviewees expressed how the disconnect between current reality and desired future could manage to co-exist productively. Appendix 2 calls out this contradiction out as a creative tension that lay at the heart of the organizational design that is experienced as hampering the kinds of change needed.

With regard to the program itself, the classroom experience, while needing some improvement, offered precisely the kind of adult (non-didactic) learning experience that a large majority of interviewees wanted. Generally the class project was seen as a fundamental building block of the program and was perceived as having potential for linking the program in a more meaningful way to targeted organizational needs. Everyone was aware that there must be a delicate balance between learning process and goals, but with the exception of one interviewee all agree that meaningful results should be an objective. But who should decide those objectives?

The reasonable question to pose is what may be expected in the short and longer term from investing in a leadership development program of the nature proposed. Clearly the program could impact understandings of culture but unless expanded it could not make the culture more adaptive to the new generation of leaders' needs. The learning history was therefore a visual and then tactile object to be worked with. It delivered the point that a more broad impact must be made possible if the participants and the organization were to be truly able to derive the latest value from the program that all espoused was important. The chairs of departments who sponsored the participants agreed that, as one articulated 'There is a lot of potential value in the program projects'. 'There is much to learn here' summarized a

departmental chairperson after the interview. The question he posed was key for many in the following validation meeting: Who is responsible for finding a leadership position that allows participants to continue the work after the program? It'd be good to have a position planned for the participants at the end of the course that allows them an opportunity to put their training to work for the benefit of the institution. Thus a potentially politically difficult question could be seen to arise as an obvious reflection from the interviews shared in the document. It was seen not as one person's guarded inquiry, but as a shared one.

Stage 4: The validation meeting

The validation meeting brought all concerned together to discuss how to better integrate the leadership program into the wider system. All interviewees agreed to come. Important for all to see was that the Dean's office and departmental chairs, i.e. the 'power holders' in the system, were willing to take the time to reflect together. This is never a foregone conclusion in a place where time equals revenue. It was indicative of a larger interest in being a part of, or at least in the know about, change efforts that now were springing up in many places throughout the institution. In addition to those whose words were in the document, the next cohort of program participants was also invited.

Specifically three types of stakeholders were present: past and current participants, future participants and sponsors. 'Sponsors' included all department chairs and executive administrators associated with the Dean's office – i.e. those whose resources support the program and who depend on the outcomes.

Meeting participants entered into a room whose walls were covered with colorful, billboard sized pages from the learning history. These hanging posters invited written comments with the colored pens set at small café style tables throughout the room. Food and

beverages were served. Specific questions were supplied to each group to catalyze written comments on the posters.

Small groups met to discuss their specific questions and debriefing was done to the entire group. The entire process was facilitated by the learning historian and program faculty.

Overall participants expressed great enthusiasm for the meeting which reflected the general experience that this had been both an unusual format for a meeting as well as one that was more efficient than typical. There had been few talking heads and much dialogue, which was different from the norms. There had been an informal tone with the lowest ranking faculty member able to ask questions of the Dean without much to-do. In going forward, much emphasis would need to be placed on broadening avenues for leadership roles. Enthusiasm helped fund next cycles of the program.

Illustrating the open system (aka unbounded) learning history

The second example we offer illustrates an 'open system learning history' that follows the suggestion that in order to address complex systems issues, the form and practice of learning history must be unleashed from previous constraints of organizational boundaries (Gearty et al., 2013; Gearty, 2009). Within the previous learning history approach givens such as 'Talmudic 2-column reflection', the written form of the history itself and the exhaustive 4- or 6-step process, is more freely interpreted. The move here is to see the learning history as more provisional and flexible in form – in the open system it is the artifact that essentially becomes the 'story' that needs to travel and be engaging to wider audiences.

In the example that follows, the complex issue under exploration was pro-environmental behavior change at the community level. Learning histories were not in fact written; there was a return to oral storytelling captured in the guise of a 'digital story'. A digital story is, as

the name suggests, a recorded film, where a series of still photos are voiced over by a narrator who tells an accompanying story. It is a simple, short and oft captivating form that contrasts with video in its slow reflective tone that is fully transportable as a presentation. We note that it benefits from the earlier suggestion that adherence to the key principle of 'presenting the authentic insider voice' is what is significant and it matters less whether this voice is in written or oral form.

Stage 0: Establishing team and engaging stakeholders

The project in question was commissioned by a Sustainable Behaviors Unit of a government department. Previous research had identified several key actor groups who might have a role to play in aiding those more reluctant to change their behavior. One such grouping was the over 50+ age group – the post-war generation many of whom naturally enacted conserving, pro-environmental behaviors – and yet whose voice and advocacy on environmental matters was muted. Embracing the question 'how might an "open systems learning history" type approach, rooted in story, not only boost the advocacy of this population, inspire action in those of other ages and from communities elsewhere?' a small team at the University of Bath worked in partnership with the University of Glamorgan's Storyworks team to develop a digital learning history (Gearty, Williams et al., 2013) and follows the four stages of design criteria for a learning history (Roth and Bradbury, 2008) showing how basic elements of learning history are evident regardless of the form chosen.

Stage 1: Co-design around 'notable results'

While a broadly agreed storyline can be so cleanly enumerated on the page, it is rarely so straightforward in practice. In this example there was a complex stage of iteration, negotiation and inquiry in really getting going. Moreover there were many different layers of stakeholders. Our first and primary stakeholder was the unit who commissioned the research.

The process of tendering and 'winning' the bid to do this work led to some of the design being pre-ordained. The general storyline was fixed in that this learning history was about pro-environmental behavior. So too the location was fixed. We would work with community volunteers of a particular age in a chosen rural UK community. We would have a number of participative workshops with our chosen storytellers and we would have a fixed number of 'diffusion' events where the histories from these storytellers would be taken elsewhere. All this was defined before we walked into the room to have our first meeting.

We moved to recruit suitable community volunteers who would be our 'storytellers' or in learning history terms our 'insider voices' on the subject of environmental behavior. Advertising in the local newspaper, visiting the local library and country market, partnering with a local charity were just some of the tactics we adopted to find participants for the research, with varied success. A kick-off workshop that took place on a freezing, foggy November evening drew only three participants. Unlike in an organizational setting where high level sponsorship can ordain requisite insiders' participation, here participation had to be nurtured. This is a key challenge with an open systems learning history and particularly a community-based one. It highlights the very real questions of sponsorship and supporting infrastructure that exist.

Stage 2: Insider/outsider team leading reflective interviews

> There was more to tell than I ever thought – and L. (researcher) was so relaxed I found her really easy to talk to.
>
> We were so much at ease it was just like talking to a friend.
>
> Digging out all the photographs made me think a bit and reminded me of things.

– Participants reflect on the learning history creation process.

On this project there was no transcript of written history, the artifact we were creating was solely a digital story. Key then were short personal stories that related to the overarching theme of the project – pro-environmental behavior. In this case primacy was being fully given to the 'insider' voice. In a 1-day workshop we worked with narrative exercises, face-to-face discussions, storyboarding and reflective writing to arrive at potential scripts that fitted the overall project storyline, and were also authentic and real for the storytellers. This was a delicate process of listening, building trust and confidence while remaining mindful of our sponsors' needs for motivational stories. Instead of interviews with fixed questions, we followed the storyteller's interests whilst making them aware of the rough framework of behaviors we had to somehow 'show' in the stories. In follow-up home visits our Storyworks researcher helped storytellers select photos and further build their confidence in their own voice. The process of history-creation was thus a reflective and thoughtful one, as our participants' quotes above show. The resulting 'digital story' was co-created like any learning history, but the 'outsider' voice became less explicit in the finished artifact.

Stage 3 (4): Validation and diffusion with original participants and others

> I've thoroughly enjoyed the process. I was feeling a bit daunted at the beginning but I've enjoyed it much more than I thought I was going to. I'm encouraged that we do so much and there are so many little ways adding up to something much bigger. There are lots of good ideas here and we can all learn from that – all learn from each other.

– A storyteller reflects at the validation workshop.

Seeing and hearing one's words echoed back in a new form can itself be a source of learning and reflection. Once agreed on the artifact, the work of learning from it can truly begin in the wider organization and beyond. This is the 'pragmatic imperative' (Roth and Kleiner, 1998),

a type of 'quality choice point' for good action research (Bradbury-Huang, 2010), which is useful for checking on the objectives of learning history.

The production of the learning history artifact, as a deliverable to the organization that supported or commissioned it, is often seen as a concluding stage of a bounded learning history project. In the open system format, the artifact becomes the central focus. Once our eight digital stories (available at the companion website) had been produced, they were shown to the original storytellers to 'validate' them for wider use. A series of five 'diffusion' workshops or more appropriately 'learning events' followed whereby community groups of different ages and geographical location engaged with the digital stories, recorded their reactions and, crucially, engaged in inquiry over two workshops to explore what pro-environmental changes these stories may or may not inspire in their own lives.

These learning events were therefore active sites of new knowledge creation. The examples highlight our stance that in any learning history process, all stages, especially the diffusion stage are active sites of learning rather than conduits of pre-packaged knowledge. People 'think and know' through story (Dodge, Ospina et al., 2005, p. 291). Knowledge production is conceived of as a social process whereby the collective dialogic reflection on the stories and actions of others, and the connection to and 'personalization' of these to local contexts is how appropriate action can be stimulated.

Stage 4 (3): Distillation and thematic writing

Once the diffusion workshops were complete an extensive cycle of 'research' distillation and thematic writing took place. While this stage may normally precede learning history creation, in this case the research task was to explore the methodology itself and its potential for change. In the diffusion workshops participants had recorded their thoughts on wall posters,

in booklets and on 'action sheets'. Discussions had been recorded. And the research team complemented this with post-workshop field notes and reflections.

Several rounds of analysis and interpretation sessions took place in which both themes relating to our findings and salient 'narratives' from our research experience were distilled. One such narrative described how two teenagers from our youngest audience had been inspired by their participation in the workshops to lobby their parents on adopting greener transport. Another told how a young mother had asked an older community member to help her with making, instead of buying, her own clothes. A further research narrative described the resistance from our older participants (over 65 years of age) who asked 'why should we change further – we've done enough already'. Thus our 'learning histories' helped seed discussions in the field whilst simultaneously bringing to the surface interesting questions such as intergenerational dynamics and the role of family in enabling or inhibiting change.

The distillation work showed that measuring systemic outcomes in terms of cause and effect was not entirely appropriate when working with 'learning history' artifacts or stories. Pro-environmental actions and outcomes of some significance had arisen out of the diffusion workshops. However these were often unexpected and not always directly related to the actions in the digital stories. Furthermore unpicking exactly what had enabled these actions was not straightforward or even possible. One finding on which all were agreed was how deep and resource intensive the process was. That to effect sustained change or clearer findings more workshops would have been required, more stories would have needed telling and more audiences convened to reflect and act as a result of them.

Conclusion

The authors are also a team of learning historians who took time, through writing together, to reflect on our practice over the years. Key questions for us are ongoing and we outline current inquiries:

Learning history is a joint production requiring sponsorship and resources

In a learning history effort, the participation of most stakeholders comes through their involvement in and support of data collection (interviews) and (or) making time for dialogue. This involves offering their time, providing access, and being involved in fact checking and validation. In learning history projects there are people responsible for interviewing and writing, preferably working together as insider/outsider teams. Some of these people, whether students, researchers, writers or consultants, are supported for the time, effort, and expenses they make with grants, stipends, or direct funding by the organizations that are involved. Most often, there are people from the organizations being studied involved serving as insiders on the learning history team. Their participation is made possible by the support of management from their organization, and salary and expense reimbursement they are allowed. In contrast, the external learning historians are affiliated with academic institutions, and supported by project funding that comes from the organizations involved, often graduate students working on a degree, through a grant or university consortia arrangement.

We have found that stakeholders' involvement is determined by the positions they hold. Given organizational flux, key stakeholders will shift as they change positions and responsibilities in their organization. As they do, support, in terms of funding or access, also shifts. The support of people and organizations is usually based on some expected benefits to their organization. Both the time it takes and the financial support that is needed makes the abilities of the external learning historians to extend and share learning history efforts that

cross the fourth, organization-to-organization system boundary, challenging. When learning history projects cross that fourth system boundary, it has generally been through the dedication of individuals from universities, often based on needs for academic recognition that comes from writing about projects, e.g. as dissertations, or because of personally held values and commitments that push to reach broader audiences with important messages. The onus for having an impact in these situations shifts onto these individuals, which is an important realization that people undertaking learning history projects should recognize. The impact from the learning and insights captured and reported in learning histories, if it is to be brought beyond original participants, requires an understanding of these conditions, and preparing to spend the needed time, and planning for the support and resources to unbind the learning history.

Outside the confines of an organization, it is not always clear where sponsorship can come from. And on what basis will participants become enrolled. Ultimately however learning historians are required to act as academic entrepreneurs. Our advice to those undertaking this style of action research is to be clear about sponsorship, and to leverage that sponsorship to open channels for the work of learning to be received and engaged with.

Ensuring quality in learning histories

Adequate methods are important for bringing in rich and valid information. Generally, participation will decrease if an overly rigid method is understood to offer merely 'scholarly' insight, or lack of rigor is implied by an overly pragmatic focus on 'best' practice. The consideration of adequate methods is one of generating robust data while simultaneously meeting the concerns of those providing that data. The critical point is to consider how a method is used, rather than only discussing what method is used.

Learning historians draw on a range of methods and are usefully informed by quality choice points in action research (Bradbury-Huang, 2010; 2014). We draw especially on practices of qualitative researchers; however, our use of these methods make them more actionable and shared than is common among qualitative researchers. The learning historians understand that inquiry itself is a form of action. For example, in interviewing stakeholders who need to be involved in a change, the questions asked can become vehicles for engagement and go beyond the interviews as only exchanges for gathering information. Validation meetings and subsequent follow up processes, such as quote checking, can also be important steps toward developing skills and designing infrastructure to help action steps go beyond approving the use of quotes or having conversations in dissemination meetings.

Learning history quality: Leaving stakeholders and organizational fields stronger

Tracking impact – especially where qualitative and quantitative reports can be obtained – are particularly effective in providing people a sense of progress, which, in turn, creates the feedback that reinforces a virtuous learning cycle.

Like other learning tools, learning histories are most effective when they are broadly shared and discussed. A consistent and timeless conclusion of a learning history project is that more time, effort and engagement is required *to allow insight on how* the particular *may be* universal. The need to do more can be accompanied with a dispiriting feeling of having not quite finished or having 'failed' in the final stages. Thus a learning history may reside on the shelf forlorn and recriminating as it gathers dust. The challenge then is to invite discussion early about just what a learning history might be for and what generative, realistic aims might be. Those coming into contact with the learning history story are impacted, momentarily at least, and move forward informed by that. New links, new relationships are

formed in the discussion of that story. Protagonists are mediated via the artifact and for a time can take on an unfamiliar persona. The system is perturbed by these artifacts that become avatars of learning. And the 'outsider team' of action researchers take forward the experience, stories and connections they have encountered into their next assignment.

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Supplemental materials on actionresearchplus.com

1. The digital stories that are mentioned in the article can be viewed on www.vimeo.com/album/1469229

Appendix1

		The local/bounded learning history	**The open systems/boundaryless learning history**
Storyline being charted		Program on leadership development for an academic medical center	Pro-environmental behavior
Sponsor		Program designer	UK government department
'Insiders'		All faculty participants, their department Chairs and Dean of School of Medicine	Five different community groups in the UK
'Outsiders'		Lead action researcher with regular input from program design team	A team of 5 action researchers and digital story experts
Reflective conversations		Taped interviews one on one with all key stakeholders	Participative focus groups, home visits, 1:1 work. Emphasis on co-creation
Form of learning history artefact(s)		Two-column document with color pictures, also made available on poster board at diffusion meeting	Eight 3-minute orally voiced digital stories
Validation		Focus group/workshop with participants to check first themes	Workshop with original 'storytellers'
Diffusion process		Participative workshop with original insiders plus new participants	Five external audiences attended 2 participative workshops, 3 months apart
Supporting infrastructure for knowledge travel and enduring change		Facilitated conversation with decision-makers about how to further support and improve the program Document was made available on an ongoing basis	+ The stories were on film and uploaded on a website + Community partnership organizations helped mobilize volunteers and audiences to participate + Storytellers felt motivated to continue telling their story after the project ended