The First-, Second- and Third-Person Dynamics of Learning History

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This is the Author's pre-print version of an article that appeared

Journal: Systemic Practice and Action Research
DOI: 10.1007/s11213-017-9436-5

There may be pre-print typos and minor referencing errors.
The final publication is available as 'Online First' in Nov 2017 as

http://link.springer.com/article/10.1007/s11213-017-9436-5

Abstract Learning history is a well delineated action research process consisting of consecutive stages of inquiry where groups and individuals engage in learning and reflecting on their past shared, but often multiple, experiences as these are recorded in a 'learning history'. Learning history has much in common with other forms of action research in that it configures first-, second- and third-person processes of inquiry in a particular way and enacts research qualities of rigour, relevance and reflexivity. Yet these and other links have as yet been tacit and under articulated - resulting in learning history often conceived as a distinctive linear method with the practice of learning history likewise confined.

This reflective article opens out and makes explicit the inherent first- second- and third- person dynamics of learning history. These dynamics are explored from the point of view of different actors – the historian, the participant and the reader - in a learning history process and connections to a general empirical method are made. Finally questions of quality in a learning history are discussed. The aim of this article is to establish firmer methodological foundations for the learning history approach and to provide practical insight into how action researchers might engage more readily in learning history work

Key words: Learning history, first-person practice, second-person practice, third-person practice, action research methodology

Introduction

A learning history is an action research approach that seeks to capture the learning from a project, initiative or event in a way that draws on the human experiences of those involved and emphasises a participative process that is devised to stimulate wider learning from those experiences (Gearty, 2014). The learning history product that arises from this process typically takes the form of a written document, often divided into two columns, whereby original, verbatim quotes from the protagonists are woven together with researcher reflections and narration. The aim of a learning history is to present an organization's story in a way that is true to the experience and that stimulates and informs conversation on what happened, why it happened and how future action may be improved (Kleiner and Roth, 1997). While there is a growing literature on learning history (e.g. Kleiner and Roth, 2000; Roth and Kleiner, 2000; Bradbury and Mainmelis, 2001; Gearty, Bradbury-Huang and Reason, 2015; Bradbury, Roth and Gearty, 2015), what has yet to be developed is an understanding of how individuals and groups inquire- and learn-in-action so as to create a learning history. Bill Torbert (1998) originally framed action research as a series of nested processes comprising first-, second- and third-person inquiry/practice whereby at each level practical, relevant knowing is sought that is of value 'for me', 'for us' and 'for them' (Mead and Marshall, 2005). In this article we draw on this framing to explore more deeply how a learning history is constructed out of the inquiry and reflections by individuals and groups. Normally conceived of as a distinct process in itself, the way first-, second- and third- person action research processes interact and move within a learning history has been implicit rather than to the fore in the literature. By considering this coupling more overtly, we articulate methods specific to learning history work as well as the pathways that link it to existing action research practices. Our aim is to contribute further methodological understandings of the learning history approach and to provide practical insight into how action researchers might engage more readily in learning

history work. The article is structured as follows. First we remind readers of the theory and practice of learning history as a modality within the action research family of approaches. Second, we introduce the construct of first-, second-and third-person practice as a lens through which individual inquiry and learning may be positioned with collaborative engagements so as to create impersonal communities of inquiry beyond the immediacy of those directly involved. Third, we explore the how the dynamics of first-, second-, and third-person processes may be enacted within a learning history.

In writing this reflective article we offer an impersonal third-person view on learning history, one that is analytical and authoritative in its positioning. We note the incongruence and potential contradictions inherent in this form when presenting a method that is inclusive and founded on the value of multiplicity of voice and perspective. In adopting this stance we propose that the cool-headed propositional developments we offer here are complementary to and in support of the life-filled practical work of learning history – a practice that has at its heart the narration of human experience and relational encounter.

The Learning History

A learning history is an action research approach to capturing and stimulating learning from experience. The product that arises from this – the learning history artefact - is sometimes likened to a case study in that it is a written narrative of an organization's recent experience of critical events, such as a change programme or a product initiative. It is a retrospective account in their own words by the people who initiated, implemented and participated in the events, as well as those affected by them, assisted by external researchers who see themselves as 'learning historians'. The aim of the process is to present the organization's story in a way that is true to the experience and that stimulates and informs conversation on what happened,

why it happened and how future action can be improved. As a shorthand a learning history is sometimes referred to as the action research version of a case study. However the analogy only goes so far: in learning history, the learning artefact (usually a document) is coupled closely to the learning process that accompanies its production - thus embedding it centrally in a process of learning (Gearty, 2014).

The learning history artefact is not presented in the conventional manner that cases are typically presented. Borrowing from Van Maanen's (1998) notion of a 'jointly told tale' the history combines the researcher's narration and sense-making with that of the participants. The pages often take the form of two-columns (Roth and Kleiner, 2000) or of distinctly separated participant quotes and researcher reflections and narration (Gearty, Bradbury-Huang et al, 2015). On the one hand, the story is told in the direct words of key participants (e.g. senior executive, employee, former manager…). On the other, and playing with this are the interpreting, synthesising, reflective and analytic comments of the learning historians. On some pages there are full-column passages which introduce topics and set the stage, and occasionally key information is provided in figures or boxes. The format is unfamiliar at first, as we tend to approach books and articles expecting authors to have organised the material to consolidate their argument.

In approaching a written learning history, readers are being invited to explore the story without the author's synthesis. There is no single voice or single version of the truth dominating. The learning history invites readers to read the accounts of what took place, the various and often conflicting views of what those events meant to different participants and the considered views of the learning historians, and form their own judgement. Hence readers

are encouraged to be aware of how they choose which column to read first and how they might switch back and forth from participants' narrative and learning historians' comments. In the discussion guide in Kleiner and Roth (2000:230), readers are invited to read the story "with the mindset of a beginner, getting curious about why people are saying what they are saying " and "notice their own reactions (when they find themselves bored or engaged, blaming or judging) and mark those reactions in the manuscript" and "come prepared to share their reactions, and link them to the place in the learning history where they were triggered, with others in the meeting or classroom".

Gearty, Bradbury-Huang and Reason (2015) talk about 'a practice of provisionality' whereby the learning history is continually opened to new perspectives, rebuffs and negotiations". In the words of Kleiner and Roth (2000:5), "there are no rules for reading a learning history; different people read segments in different orders". The readers are encouraged to reflect what they are reading. What do they find credible? What decisions might they make in those situations? What in the story evokes questions about the readers' own current organizational concerns and how they are handling them? In this way the reader enters the co-authored learning history as another participant – engaging with the text in a 'writerly' way (Sumara and Luce-Kapler, 1993, Barthes 1974), by writing his or her own meaning. The invitation into ambiguity proffered by a learning history aligns it with critical pedagogies that seek to preserve qualities of the inherently "poly-vocal and poly-semic" that often are flattened out in standard research studies (Siri and Ali Khan, 2011).

The methodology of the learning history draws on many sources. The central approach in both the theory underlying learning history and the published format is action science, which

is grounded in Lewin's approach to action research (Argyris, Putnam and Smith, 1985). Many of the concepts and techniques within action science – the double column pages, the ladder of inference, organizational defensive routines, organizational learning are utilised. Action science and process consultation provide focus for inquiry into learning and developing the capacity for reflection on experience, for both participants in the cases and those reading the published account. The reflective conversations with key participants draw on techniques from ethnography and oral history and emergent themes are formulated through a grounded theory approach.

Learning histories are an important contribution to both the management literature and to learning pedagogy. As a contribution to the literature, they present valuable case material which reflects the real stories of organizations and link those stories to established and emergent theory. They provide interesting challenges to how research is conducted in organizations and written up. As a learning pedagogy, they provide a challenge approach to managerial learning and to students of organization studies. Authors of learning histories, such as Kleiner and Roth (2000) and Roth and Kleiner (2000) consistently emphasise, one cannot read a learning history on one's own. A learning history needs to be read it in conjunction with others and discussed with them so that the case material can be used to explore assumptions, values and experience of life in organizations. These authors espouse that the learning history books be used for study seminars in organizations and that managers use them as a vehicle for their own learning with their peers. Gearty, Bradbury-Huang and Reason (2015:17) in their development of the open system learning history where the learning originates in and moves beyond organizational boundaries further emphasize the point – by suggesting that a learning history process could be described as "an orchestrated series of conversational spaces".

Learning history is then a distinctive practice of action research and management learning that brings the rigor of research and analysis together with live inquiry. As such it is an encompassing methodology one that is

> an ever-deepening process from the familiar to the unfamiliar. Starting with the history itself that is close enough to the familiar modernist ideas on which our workworld is built, the engagement follows a gentle progression into a less familiar, more postmodern space of contradiction and multiplicity that runs counter to modernist tendencies to homogenise and it is in this space that learning takes place.
>
> (Gearty, 2009: 203)

As action research, a learning history is not merely a form of study that builds understanding; it concerns itself with brokering practical, useful knowing. Reason and Torbert (2001: 6) stress that the central question is how to act in a 'timely, voluntary, mutual; validity-testing, transformative action at all moments of living'. Like other forms of action research learning history responds to the challenge of actionable learning but again does so distinctively. "Practical knowing operates from a store of accumulated insights" write Coghlan and Shani (2017: 125) who propose inquiring in the present tense as the dynamic mechanism of action research where learning relevant to the present "here and now situation" comes into play. A learning history delves into past events – as Roth and Kleiner advise, events with 'notable results' - encouraging reflections and stories and insights on that past to be aired, to be garnered and to be discussed. By inquiring persistently into 'what does this mean for me now – how do I respond' the store of past insight is re-shaped into present and future directed learning. All participants across a learning history process are therefore connecting

dimensions of past, present and future - this time dimension of AR that add to its richness and complexity and its 27 flavours (Chandler and Torbert, 2003).

What is constant across human nature that is given at birth and develops through education and socialization is our engagement with a world that is mediated by meaning (Cronin, 2017). As individuals we constantly engage in experiencing, questioning, reflecting and dealing with value, choices and decisions and be responsible for our actions. We pose questions for intelligence in asking what is it, and asking questions for reflection, Is it so? and asking questions for deliberation, What might I do? Intellectual satisfaction comes not only through answers of content but also through how we learn to process our questions, find answers which lead to further questions and so on. Community and organizations are constructed through people having a common field of experience, common modes of understanding and judgement and common consent about what to do. These processes are not always followed. As individuals we may not be attentive to experience. We may ignore insights and avoid awkward questions and avoid taking responsibility for our actions. There may be common misunderstandings, distrust, suspicion and conflict in communities and organizations. So there is a dialectic. On the one hand as individuals we are responsible for the lives we lead and we are collectively responsible for the world we create. History as the discipline that studies and provides insights into that dialectic explores that dialectic between the thinking, valuing and actions of individuals and the collaborative ventures through community and organization creation and maintenance (Lonergan, 2017). Accordingly, our reflection on the process of the learning history takes us to the inquiry and cognitional process of individuals and their collaborative engagement in shared inquiry into collective experience and diverse understandings that comprise the learning history. To this end we introduce the construct of first-, second- and third-person inquiry/practice.

Three Voices/Practices

The framework of first-, second- and third-person voice/inquiry and practice is firmly established within action research (Reason and Torbert, 2001; Reason and Bradbury, 2008; Coghlan and Brannick, 2014; Bradbury, 2015). *First-person* research is typically characterized as a form of inquiry and practice by individuals into their own inquiry processes (Marshall, 2016). It can take researchers "upstream" where they may attend to and inquire into their basic assumptions, desires, intentions and philosophy of life. It can also take them "downstream" where they attend to and inquire into their behaviour, ways of relating and their action in the world. *Second-person* inquiry/practice addresses their ability to inquire into and work with others on issues of mutual concern, through face-to-face dialogue, conversation and joint action. As action research is integrally collaborative and democratic the quality of second person inquiry and action is paramount. In our view, second person practice is primary. It is through working with others through collaborative processes of engaging in constructing the project, planning action, taking action, evaluating action and framing learning that individual (first person) learning takes place. The learning from that second and first experience is made available to a third person audience for it to learn. *Third person* inquiry/practice aims at creating communities of inquiry, involving people beyond the direct second person action. Third person is impersonal and is reached through dissemination by reporting, publishing and extrapolating from the concrete to the general.

This triple process framework captures the engagements of individual reflexivity in-action, collaborative engagement in–action and cogenerating actionable knowledge in an integrated

framework. As Reason and Torbert (2001) point out there are plenty of implicit examples of first, second and third-person inquiry, but what is required now is explicit integrating of all three persons with action and inquiry. There are two questions being posed in this article. How are first-, second- and third-person practices enacted in the creation of a learning history? How might these practices inform the methodological underpinnings of this approach?

First-, Second- and Third-Person Voices/Practices in a Learning History

The three approaches, first-, second- and third-person, enacted in and through action, may be understood to underpin the dynamics of the learning history (Table 1). These dynamics are enacted variously depending on the participants' role in the learning process. We have identified these three distinctive roles to unpack further the interplay of inquiry between participants in the process.

[Table 1 about here]

Distinct Co-Researcher Roles in a Learning History

A learning history process extends into an organizational system and involves participants in a sequence of different activities and inquiries that are uniquely designed to fit the research and learning aims. Distinctive roles are more evident in a learning history than in some other action inquiry processes like co-operative inquiry where the notion of research 'subjects' is deliberately challenged. In a learning history, while mutuality is still a key principle, the difference between 'insider/outsider' (Bartunek, 2008) researchers is fundamental. A key

learning feature derives from how the 'insider' experience is meshed with the 'outsider' researcher perspective. At the heart of the process is the learning historian team – sometime comprised itself of 'insiders' and 'outsiders' who create the space to do the work, dialogue with the participants, create the history and engage the organization and beyond in learning from it.

For the purposes of our reflection we distinguish three-key roles in a learning history – (i) the learning historian – acting alone or with members of the core research team; (ii) key participants – persons from the organization who share their perspective with the learning historian team and who are featured in the history (iii) reader-learner – a person from the organization who is not featured in the learning history but has some interest to learn from it; reader-learners are so called to highlight that a learning history process involves not just reading but also collaborative inquiry. Reader-learners might have very different stakes and interests in the history, which can range from being very invested – for example in cases where they also were involved in some way in the story – to being mildly interested – for example in cases where they are from another organization or department trying to do similar things or as students of organization development and change.

Thus a learning history will involve differentiated participants and will enact a spirit of co-inquiry and mutuality that is a common feature of all action research. As these participants and stakeholders come together in different groupings at different stages – the principle of co-research where a group meet to inquire something of mutual interest face to face - is always in play. However depending on the role played the experience of inquiry and the questions faced can be quite different. By distinguishing these in the next section we draw out the

different first-, second- and third- person dynamics that arise. As we do, we will draw in a series of snippets from our experience of conducting learning histories in the field. These are intended as illustrations rather than fully contextualised empirical data. They are set out as a series of interweaving recollections told in the first-person.

First-Person Voice/Practice

We identify the first person processes in three expressions of the individual in a learning history: the learning historian, the key organizational participants in the learning history and the reader-learners of the learning history. In search of gender balance and clarity we identify the learning historian as female, the participant as male and the reader-learner as the impersonal 'they' in what follows.

The Learning Historian

Like any action researcher the learning historian uses first-person practices to interrogate the assumptions and positions that guide her choices and inform her approach. As she moves through the stages of a learning history process she likewise will, like any action researcher, be attending and inquiring into her practice as a researcher and the change agendas she is bringing to the work (Marshall, 2016; Cronin, 2017). Furthermore, writing or telling history is inherently political. The act of listening to peoples' stories, and later choosing what and how those voices will be recorded in history, and how they might disrupt or amplify existing organizational narratives confers on the historian a type of agency that is rigorous and particular to this type of work and distinguishes it from other more facilitative action research approaches. The practice of reflexivity is then not merely a matter of good facilitative

practice but "vital in helping the researcher to question his or her choices and to explore his or her own perspectives and prejudices" (Gearty, Bradbury et al, 2015: 15).

The learning historian occupies a complex role that necessitates a multi-facetted practice and a level of skill in moving between modalities of research, story creation, facilitation and presentation. As she moves from facilitating dialogues with participants, to writing and crafting a history to engaging and strategizing with organizational insiders on propagating the learning, the role of the historian is part political, part documenter and part animateur. Roth and Kleiner (1998) signal that it is a cycling between the research, mythic and pragmatic imperatives that keeps the historian honest and Gearty et al (2015) expand on the practices of 'reflexivity' necessary to ensure such honesty. Throughout a learning history then the historian finds herself in scenarios replete with the opportunity for rigorous first-person questioning and inquiry – whether it is on a matter of practice ("what choices am I making during this interview"), ethics ("whose voice or story may be distorted or absent by this history making?") or personal self-discovery ("why am I so impacted by this person's story and not that one?").

In the interviewing stage for example, a somatic as well as intellectual awareness supports the historian to tune into not only what is being heard but how he or she is responding.

Recollection 1 – Tuning in beyond the words

In one case, I recall conducting a learning history dialogue with a man J. who was largely responsible for an innovative low carbon project in the midlands in the UK. He was an impressive, imposing man and the achievements he described were convincing, matter-of-fact

and as he said himself – obvious. In fact he couldn't understand why others in roles similar to his in other organizations were not doing the same. As the interview proceeded I recalled later in my journal, I found myself relaxing into a place of certainty and incredulity myself. It was a 'no-brainer' – this man knew what needed to be done – why were there not more like him? It was by reflecting in this way, noticing my whole body response that I was able to then pose the question back into the history together with a researcher reflection on the sense of certainty and confidence this man could evoke. Thus the success story could be presented with the merits and plaudits rightfully deserved – as well as the questions it raised – from the outside of rather than from 'inside' the heroic story.

Being impressed, as well as being bored, doubtful, confused, puzzled or nervous are all common feelings that might arise during a learning history interview and that bubble alongside that desired state of cool-headed curiosity that we ask of our learning historians. Such reactions are natural. What's important is to sustain a reflexive attention to the stories one is hearing as in the above example. This starts with the historian and spreads out through the process to the key participants and reader-learners who are encouraged to develop this too.

The political dimension of storytelling then must flow into the first-person work of the learning historian. At all stages of the process and calls for a continual alertness to how agendas – the historians' included – are interacting and directing choices both in the moment and in the writing.

Key Organizational Participants

There are the participants in the organization whose learning history is being constructed. Through the invitation from and other interventions by the learning historian these individuals relate their experience, question it, receive insights and form judgements about what their experience means. Though not explicitly engaged or contracted into a first-person inquiry, the key participant is nonetheless confronted with the possibility for deep personal reflection as he is led through a series of situations that consider and make meaning of his words. The resulting twin-pronged move of attentiveness together with a critical questioning when balanced well can be powerful. The participant experiences himself as heard first individually and then within a wider range of experiences not all of which might corroborate his view or story. Herein lies the possibility for first-person inquiry for the key participants which lie as much in their reactions to the storymaking as the story itself.

Recollection 2 – Disrupting the story about the story

A key participant K. in one of my early learning histories was a local government official who during the learning history dialogue told a lively and well-rehearsed story of how he and colleagues had successfully brought through a historic change in policy in their organization. During that dialogue I interjected with a number of reflective prompts and yet had an impression that, as yet, his story was not disrupted. It was only later when, as his words and story started to come back to him that a reflective space started to open. “Did I really say all that?”, he e-mailed back on receiving the transcript of our interview. And later when invited to be alongside others in a workshop who read his story and who then told stories of their own, he expressed bemusement “I didn’t realise there were so many people doing similar things”. As his story became more public his relationship with it and the work it represented

was shifting. This was subtle and not caught necessarily in the formal moments of the learning history – more in the side conversations – the e-mails and phone conversations that accompanied the later validation and dissemination stages.

Reader-Learners

The readers of the learning history are invited to read the narrative and the voices of participants who typically provide alternative if not conflicting perspectives on what happened. They are invited to question what they are reading and to seek insights from the multiple voices and to form judgements, and also to question their own assumptions and values.

Reader-learners generally have some kind of connection or interest in the events of the history though, as mentioned, their stake varies enormously – from those directly impacted or featured – to those more distant, interested participants from inside or even sometimes outside the organization. Reactions and responses to the learning history and the learning opportunities will vary accordingly – frustration, delight, incredulity, jealousy, interest, empathy and admiration are common words recorded in our workshops. In the later stages of learning history validation and dissemination there are opportunities to not only inquire into what the reactions of these stakeholders say about the organization overall but also for themselves as they are confronted through their own reactions with what is important to them. It is not at all uncommon for those reader-learners in managerial positions in or around the learning history to ask or indeed insist, during validation, for quotations of others to be removed. Within such ostensibly constraining actions, there can sometimes be space for

inquiry. The learning historian(s) need(s) to make judgements on whether or not this is timely.

There are then many opportunities for self-reflection offered in a learning history. A pattern of reflection is set up through the process and will move through the learning system - it starts with the learning historians themselves and moves to the key participants and then the reader-learners. The first-person inquiry aspect of this process does become more privatised as the process reaches out to the wider readers and learning – so it is hard to claim the extent of it – but even then the opportunities are there.

Second-Person Voice/Practice

Learning history work has much in common with other forms of action research. It requires relational skill – the ability to work face to face with others with perception and awareness – to listen well and to discern what is important to pursue in reflection and action. Second-person inquiry/practices are also evident in the processes of a learning history. Being able to facilitate groups as well as individuals in reflective inquiry is a core skill for any action researcher and John Heron's account of the special inquiry skills required for co-operative inquiry could be said to apply equally to learning history. These include being present, dynamically open to the situation, holding intentions adaptively and emotional competence (Heron, 1999).

In addition learning history work demands a mix of analytical research skills together with the art and craft of writing an engaging learning document. Choices and judgements litter the

path to a learning history and each learning historian (or team of historians) makes different choices on the tradeoff between analytical rigour and narrative unity (MacIntyre, 1981). Discernment is therefore a skill that is particularly important in this practice. Being decisive and able to locate where the learning opportunities lie and what to attend to in the writing as well as in the face to face is part of learning history practice (Byrne, 2016).

The learning historian not only facilitates a series of second-person inquiries within and around a learning history process but also actively participates and co-inquires in these. The most obvious of these is the reflective interview or dialogue (Gearty, 2014). The reflective interview is not only a telling of what happened but also an open-ended exploration between historian and protagonist as to its meaning: akin to a dialogue – where a stream of meaning is flowing among and through us and between us" (Bohm, 2013:2).

The effect of this is that the dialogue needs to follow the energy of the participant which can lead it to unexpected places. Coming to a learning history dialogue with an expectation and a set of prepared questions can be helpful – but only if the historian is willing to quietly fold them away if necessary.

Recollection 3

A few years back I experimented with conducting a learning history of a small high-performing project that was ongoing in a public sector organization.. The idea was that by conducting a learning history while the project was still open there was potential to learn and intervene 'contemporaneously' – to learn and influence the history in the making. A series of learning history interviews with the project team were then focussed on what had already

happened as well as what **was** actually happening. In one such dialogue, with the project manager, he arrived open and yet, he observed himself, completely resistant to reflect on what was going on. He was unable to step away from the project day-to-day activities. Instead of working through my questions about the project, we spent the dialogue then reflecting on this – the way he became submerged in the project activity and his need for achievement. Five years later, when I contacted him for a follow-up he recalled the learning history project well and how it had provided him with space to reflect on his work and the importance of that. It's "mindfulness in the work environment and with a specific focus" he commented while updating me that the original project had ultimately been cancelled.

There is the expected story of a learning history and the one that arises in the telling. The two are not always fully connected in the content but are connected via the storyteller themselves and where the bounds of the learning history extends to embrace the story of the 'telling' a deeper learning can be stimulated.

Around the learning history, second person inquiries within the research team (e.g. "what are the politics of what we are engaged in?") as well as with the insider commissioning team (e.g. "what are we learning here that reflects the wider system?") can not only enrich the learning for those involved but also be strategic and lead to an intervention that is responsive to what is emerging.

The organizational participants engage in meetings and discussions with individuals, teams, groups, boards and with the learning historians. The reader-learners of the learning history are invited to participate in shared inquiry into their experience, understanding and judgements of the learning history in learning seminars and to draw out shared learning. For

example when reader-learners from another organization tasked with similar low carbon targets gathered to discuss the learning history involving the champion innovator J. (from recollection 1) they were facilitated to question themselves as to why, in their particular setting, the project that had seemed so easy for J, a no-brainer in fact, was very difficult for them. The learning history format meant that J's words were presented not as a perfect story but also open to interrogation and questioning. In this way provocation goes both ways – leading reader-learners to both connect and interrogate their own stories as well as those of others –in a constructive way.

Third-Person Voice/Practice

Third-person action research extends beyond small scale projects to reach out to third-parties who are not directly involved in the research. Thus while reports and articles arising from the research are part of third-person work, this is systemic work that goes beyond dissemination. Reason and Bradbury (2008) refer to strategies for building a wider 'community of inquiry' across dispersed geographies and interests, while others emphasize links to movements for social change defining third person work as the stimulation of 'political events' (Toulmin and Gustavsen, 1996). The publication and dissemination of a learning history offers a contribution to the management literature and to learning pedagogy, as noted above. As a contribution to the literature, they present valuable case material which reflects the real stories of organizations and link those stories to established and emergent theory. They provide interesting challenges to how research is conducted in organizations and written up. As a learning pedagogy, they provide a challenge approach to managerial learning and to students of organization studies. The published learning histories of *OilChange* (Kleiner and Roth, 2000) *CarLaunch* (Roth and Kleiner, 2000), *Det Naturglia Steget* (Bradbury and

Mainmelis, 2001) and *Lowcarbonworks* (Reason et al., 2009) provide rich third-person contributions on the underlying theory and methodologies of learning history as exemplified in actual cases. Third-person work continues to attend to questions of participation and learning in interesting ways. The learning history artefact lends itself to third-person work in that it is an output around which wider communities of inquiry can be organised long past the completion date of the project.

More recent developments in learning history have opened out the range of possible forms for a learning history artefact to include digital film and more flexible written forms (Gearty, Bradbury-Huang, and Reason, 2015). This 'unleashing' from the original 2-column widens the possibility for learning histories to reach communities of interest more readily and tees up third person work to follow both routes of formal and informal dissemination. For example in a recent open system learning history project for the UK government that explored how communities might adopt pro-environmental behaviours, digital stories were used as the learning artefact (Gearty, 2014). These were widely published on project websites and in turn were much more readily available to the original participants some of whom initiated their own communities of inquiry by showing the films to their own families and friends and, in one case, at a local school (Gearty, Williams et al, 2013).

Telling history is a serious matter. The act of co-creating history with participants can be significant for an individual or organization involved in a learning history project. While the third-person aspects of the work are necessarily hard to gauge, the stake and engagement of those key organizational participants and the commissioning team who co-create the history is a factor in determining the third-person potential of any particular learning history.

Discussion

The questions being posed in this article are. How are first-, second- and third-person practices enacted in the creation of a learning history? How might they inform the methodological underpinnings of this approach?

Learning History as an Empirical Method

In enacting a learning history and aiming to explore how different individual and groups understand the events that shape their shared history, learning historians, organizational members and readers may usefully adopt what Coghlan (2010) refers to as a general empirical method. This method is grounded in the basic activities of human knowing: being attentive to (experience), exploring intelligently to envisage possible explanations of that data (understanding), judging soundly, preferring as probable or certain the explanations that provide the best account for the data (judgement) and being responsible for decisions and actions. When individuals attend to organizational experiences, converse with others to understand, and construct shared meanings (however provisional) from which appropriate interventions may be selected and implemented, they are enacting a general empirical method. In this manner they are embodying rigour in a science of action and seeking to address explicitly the pitfalls of working from untested inferences and attributions. The general empirical method applied to the first-person practice of the learning historian, the organizational member and the reader-learner as they attend to their experience, question it and subject their insights to critical questioning, and for example, catching how they might be leaning toward one interpretation rather than another or favouring one narrative over another. It applies to the second-person practice as individuals engage in dialogue with others and

explore others' insights into and interpretations of the same events (Scolari, Coghlan and Shani, 2015; Coghlan, 2017). Between the first- and second- person realms a dynamic is created whereby fixed narratives are 'softened' and tempered by the possibility of others. At its best this work leads to the possibility of a new narrative rather than a winning narrative or a cacophony of irreconcilable points of view.

Quality in a Learning History

A further question may be posed. How might the quality of a learning history be assessed? In consolidating our answer to this question we are drawing on Pasmore, Woodman, and Simmons' (2008) framing of research quality in term of being *rigorous, reflective* and *relevant*. *Rigorous* in action research typically refers to how data are generated, gathered, explored and evaluated, how events are questioned and interpreted through multiple action research cycles. *Reflective* refers to the attentiveness to the actions and the thinking behind them and the critical questions posed. *Relevant* refers to how the research works on a real issue and seeks to generate actionable knowledge. Pasmore, Woodman, and Simmons make the point that while frequently some researchers make tradeoffs between achieving being rigorous, reflective and relevant, the three dimensions overlap and reinforce each other. Greater rigour adds to relevance; greater relevance leads to greater rigour and opens up deeper reflection. Pasmore and Woodman (2017) suggest that the field of organization development and change research, in addition to being more rigorous, needs to increase in relevance while being more reflective in terms of informing scholars and practitioners. We think that there is a great deal to be done to strengthen the methodological underpinnings and methods of learning history as a mode within the action research family of approaches and

that articulating the first-.second- and third-person dynamics in terms of the quality dimensions of being rigorous, reflective and relevant contributes to such a strengthening.

[Table 2 about here]

Table 2 provides an outline of how a learning history might meet the quality requirements of being rigorous, reflective and relevant. Each of these qualities apply in the first-, second and third-person processes. A learning history involves a series of nested and sometimes overlapping cycles of inquiry involving the learning historian, participants and ultimately reader-learners. *Rigour* is demonstrated in how data is gathered from these cycles and how opens up questioning and how it supports choices. At the first-person *rigour* asks for evidence that participants have engaged rigorously in the general empirical method (i.e. being attentive to experience, intelligent in their understanding, reasonable in their judgements and responsible in taking action) from their respective perspectives. In the second-person, notably in the learning history dialogues, *rigour* refers to how those dialogues were recorded and the rationale and transparency around how choices are made in making selections from that data in what is reported; *rigour* at third-person how the learning history is an outcome of the first- and second-person dynamics. *Reflective* points to the quality of critical thinking in the respective individual roles and at the different stages throughout the process so that the presentation of the learning history to the third-person audience challenges their thinking. Disruption or provocation can be an indicator of a quality reflective process – when an underpinning rigor can support it. *Relevant* demonstrates how the learning history addresses the practical concerns and experiences of the different stakeholder involved. It invites a sharing of an individuals' experience and thinking at first-person. Shared inquiry at second-

person into real events and an invitation to connect these to in-situ practical challenges and experiences cogenerates actionable knowledge, that is, knowledge that useful for practitioners and robust for scholars. The usefulness of that knowledge ultimately tests the quality of the process which in turn depends on how the three dimensions we have outlined are interlinked and enacted.

Recollection 4

A few years back I was invited as a participant into a learning history that was being conducted in a research community of which I was a part. This learning history was conducted by a single outside researcher over a number of months and it involved interviews with myself and a range of colleagues. The work was conducted diligently, attentively and with good attention to the later stages of validation and dissemination. The final workshop was participative and well facilitated. Yet, reflecting later with a colleague, we agreed that nothing in the whole process surprised us as participants. When I read the learning history, I appreciated the rigour but all the quotations from my colleagues were perspectives I either agreed with or already recognised. I was unprovoked by any of it. I was left reflecting on the process and had it been worth it? Perhaps we already knew ourselves well enough? Or the undiscussable dynamics in our group remained just so? Unspeakable and therefore undiscussable.

While the above recollection is merely an anecdotal example it illustrates the importance of going beyond questions of 'good' when it comes to assessing the quality of a learning history.

So what would help us know that a learning history is not only good but also worthwhile? Recently learning history experts have suggested a quality learning history must not only build partnership but it must leave the stakeholders and the organizational field stronger (Bradbury, Roth et al. 2015). The strengthening wed suggest comes from critical questioning and a degree of disturbance. A worthwhile learning history widens the interpretations that individuals and organizations apply. Not only in relation to the subject-matter of the learning history in hand but it builds their skill to do so in the future also. A pathway to that opening out is often discomfort – as fixed narratives get weakened or lightened. Thus some quality assessment questions to ask around learning history might be: "When did the learning history lead to discomfort, puzzlement, bafflement on the part of the participants?". Another pathway relates to making visible that which was previously known to an individual or organization but not articulated. "What did the learning history make visible or amplify that had previously not been known?" And a final pathway relates to reflective skill "how well have participants been equipped to work with multiple organizational perspectives in the future – how have their skills been developed." These three questions might help in the assessments and ongoing quality processes for learning history work. In the authors' anecdote above, and with the caveat that this was but one participant's experience, the questions would have highlighted the shortfall.

Conclusions

In this article we have explored the dynamics of individual and collaborative inquiry and practices within the learning history. These tend to be largely tacit in presentations of learning histories. By attending to how first- and second-person processes play out variously for the different actors in a learning history, the practice of learning history and assessments

of quality in this work have been further articulated. In considering the third-person realm we note the specific nature of learning history practice and the unique possibilities it creates there.

By reflecting the dynamics of learning history, we have noted firmer methodological underpinnings in action science and empirical method. In addition, by focusing on the coupling between learning history and the fundamental action research processes of first-, second- and third- person inquiry we offer an integrating perspective that could be more broadly instructive. Learning history is but one of a number of distinctive modalities within the action research family. Like appreciative inquiry, collaborative inquiry it is crafted and built on fundamental methods of inquiry. By connecting and understanding how these fundamentals are arising we found ourselves returning again and again to the primacy of the face-to face-encounter of participants, in whatever role they may be playing (i.e. learning historian, organizational participant, reader-learner). We hope that this exploration may open up further explorations of first-, second- and third person practices in learning histories so as to enable education and training for those engaging in a learning history and for the advancement of our understanding of this dynamic form of social inquiry.

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