Research *for* Action and Research *in* Action: Processual and Action Research in Dialogue?

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AOIFE MCDERMOTT*
DAVID COGHLAN**
MARY A. KEATING**

ABSTRACT

Change is a key area of concern for academics and practitioners alike. However, the approaches applied in the research of change have been subject to sustained critiques regarding their neglect of the context and process of change, as well as the relationship between scholars and practitioners within the research process. This methodological paper considers two approaches to researching change in organisations which take account of these factors, albeit in different manners: processual research and action research. While entering the dialogue, the following are discussed: aims, philosophy, role of the researcher, conception of change, methodology, contribution and treatment of context, history, process and time. Whilst the two have underlying philosophical differences and will never merge, comparison provides valuable insights into the choices available to researchers and the trade-offs between process and outcomes in change-related research.

Key Words: Action research; Change research; Methodology; Processual research.

*Department of Human Resource Management, DCU Business School, Dublin City University, Glasnevin, Dublin 9
** School of Business, Trinity College Dublin, Dublin 2

INTRODUCTION

Action and practice are of significant concern for academics and practitioners alike (Reason and Torbert, 2001; Argyris, 2003; Coghlan and Brannick, 2005). A particularly significant dimension of action and practice is the engagement in and understanding of change (Greenwood and Hinings, 2006). However, the literature on change is significant, fragmented and complex. The scale of the literature is illustrated in a search of the ABI/INFORM database for the period 01 January 2005 to 31 December 2005, which led to the identification of 6,176 articles on the subject of 'change and management'. Nonetheless, the issue is not solely one of volume. While there have been some attempts to explain inconsistencies in the literature (By, 2005; Higgs and Rowland, 2005), a significant degree of the fragmentation in the field can be explained by the myriad approaches applied in the research of change. These approaches have been subject to sustained critiques regarding their neglect of the context and process of change (Pettigrew et al., 2001; Pettigrew, 1992), as well as the relationship between scholars and practitioners within the research process (Pettigrew et al., 2001; Shani et al., 2008). Consequently, this methodological paper considers two approaches to researching change in organisations which take account of both the process and context of change: action research and processual research (Cooke and Wolfram-Cox, 2005; Dawson, 2003). In addition, the processual approach addresses a further area identified as in need of development in the study of organisational change: the link between change processes and organisational performance outcomes (Pettigrew et al., 2001). While the tradition of research into change has been criticised as 'ahistorical, aprocessual and acontextual' (Pettigrew et al., 1992: 6), and has led to the emergence of the processual approach, action research has been taking account of history, context and process for a period of almost 60 years. Discussing and comparing these approaches leads to consideration of the basis for dialogue between them. Although emphasising shared concerns, this paper also identifies fundamental philosophical differences underlying the approaches, as well as significant differences in the level of engagement of the researcher. While processual research is an approach to research *on* action, action research can be conceived as research *in* action. Whilst these

deep-seated dissimilarities denote that the two approaches will never merge, they also provide a secure foundation from which each approach can dialogue with and learn from the other, whilst maintaining their own integrity.

This paper is comprised of three sections. The first section provides an overview of action research and the processual approach. Building upon this foundation, the second section analyses the differences between the approaches. The third section takes account of critiques of each approach and integrates the preceding sections to suggest arenas where dialogue may occur, the direction that learning may take and the trade-offs which researchers will encounter in choosing between the approaches.

AN OVERVIEW OF ACTION RESEARCH AND THE PROCESSUAL APPROACH

Although both processual research and action research can be considered holistic approaches to the research of change, this section is concerned with further delineating the key characteristics of each approach. The aims, how they are methodologically enacted and the treatment of the context and process of change within each approach are outlined.

Action Research

Action research is a generic term that covers many forms of action-oriented research. Common to all is the aim to resolve social or organisational issues in conjunction with those who are experiencing them, while simultaneously contributing to scientific knowledge. It is underpinned by diversity in theory and practice, so providing a wide choice regarding what approach might be appropriate for any particular research inquiry (Reason and Bradbury, 2008). However, in spite of this diversity, four broad characteristics define action research (Coghlan and Brannick, 2005; Coughlan and Coghlan, 2002; Greenwood and Levin, 2007; Gummesson, 2000; Reason and Torbert, 2001; Susman and Evered, 1978):

- Action research focuses on research *in* action, rather than research *about* action. The central idea is that action research uses a scientific approach to study the resolution of important social or

organisational issues together with those who experience these issues directly. Action research works through a cyclical four-step process of consciously and deliberately (i) planning, (ii) taking action and (iii) evaluating the action, (iv) leading to further planning and so on.

- Action research is participative and democratic. Members of the system that is being studied participate actively in the cyclical action–reflection process outlined above. Such participation is frequently described as research *with* people rather than research *on* people.
- Action research is research concurrent with action. The goal is to make action more effective while simultaneously building up a body of scientific knowledge.
- Action research is both a sequence of events and an approach to problem solving. As a sequence of events, it comprises iterative cycles of gathering data, feeding it back to those concerned, analysing the data, planning action, taking action and evaluating, leading to further data gathering and so on. As an approach to problem solving, it is an application of the scientific method of fact-finding and experimentation to practical problems. These issues require action solutions involving the collaboration and cooperation of the action researchers and members of the organisational system. The desired outcomes of the action research approach are not just solutions to the immediate problems but comprise important learning from outcomes – both intended and unintended – and a contribution to scientific knowledge and theory.

Thus action research is a transformational social science, grounded in real issues, but linked to the scientific endeavour. The particular value and contribution of this transformational approach is reflected in Reason and Torbert's (2001: 6) assertion that after the linguistic turn of postmodernism, it is now time for the 'action turn' where we can re-vision our view of the nature and purpose of social science and 'forge a more direct link between the intellectual knowledge and moment-to-moment personal and social action, so that inquiry contributes *directly* to the flourishing of human persons, their communities and the ecosystems of which they are part'.

Processual Research
In its broadest sense processual research refers to any research con-
cerned with a process that exists between two points in time,
regardless of whether it is actually observable (Tuttle, 1997).
Dawson (1997) noted that there are different types of processual
research; these can broadly be separated on geographical lines,
between the UK and the USA. While the US approach focuses pre-
dominantly on the process of change itself, the UK approach
attempts to incorporate the role of history and context into its analy-
sis. This occurs at multiple levels and at each phase of the process
of change. It is the UK approach that is the subject of this paper.
Five characteristics of this approach were identified by Pettigrew
(1997). These are:

1. embeddedness, which refers to studying processes across a num-
    ber of levels of analysis
2. temporal interconnectedness, which refers to studying processes
    in past, present and future time
3. a role in explanation for context and action
4. a search for holistic rather than linear explanations of process
5. using process analysis to find and explain outcomes

Hence, processual research refers to 'the dynamic study of behav-
iour in organisations, focusing on organisational context, sequences
of incidents and actions which unfold over time' (Ferlie and
McNulty, 1997: 70). It aims to describe, analyse and explain pat-
terns in management and change processes (Pettigrew, 1992) and to
link findings to outcomes (Pettigrew, 1997). In emphasising pattern
identification and holistic explanations, it also has the capacity to
illuminate why, when and how policy and other change outcomes
are shaped by processes and contexts. The approach explicitly
attempts to accommodate competing histories on the process of
change, recognising that the official characterisation of change may
represent the political position of key individuals, rather than organ-
isational reality (Dawson, 1994). Linking findings to outcomes has
been used to provide pragmatic guidelines to managers. One prime
example is the identification by Pettigrew and Whipp (1991) of the
five interrelated factors shaping a firm's performance (National

Co-ordinating Centre for NHS Service Delivery and Organisation R&D, 2001). These factors mirror quite closely the model of change management developed by Kotter (1996). Whilst action research is classified as research *in* action, due to its action-oriented and intervention focus, processual research can be characterised as research *on* action given the more removed nature of its analytic endeavours.

CONTRASTING ACTION RESEARCH AND THE PROCESSUAL APPROACH

The processual approach differs from action research on three important dimensions. Firstly, unlike action research it does not aim to guide real-time action in the particular organisation under study, but focuses on generating mid-level theory and recommendations for the future. Ferlie and McNulty (1997: 379) articulate this in their assertion that process research can be seen as '"research for action", but not action research'.

Secondly, although participant observation may be used in processual research, unlike action research it tends to be neither participant nor democratic, in terms of being more oriented towards research on, rather than with people. Thirdly, context is considered more explicitly in processual than action research and this is particularly the case with regard to the external context. Dawson (1994, 2003) and Pettigrew (1985, 1987a, 1987b, 1988) identify the dimensions of context which should be considered in a processual analysis. Both authors recognise that the context of behaviour for change processes includes current and historical events inside and outside organisations. Both also articulate concern with broadly similar areas, although Dawson articulates an additional concern with technology in both the inner and outer context. However, it is important to note that the view of context adopted is largely deterministic (Watson, 2004) and has failed to develop substantially since Pettigrew's (1985) early work (Caldwell, 2006). Similarly Fitzgerald et al. (2002) noted that context has been operationalised in a primitive way in processual research, with a need for more specification. For Caldwell (2006), Pettigrew uses outer context as a surrogate for environment and inner context as a surrogate for structure, but fails to develop a systematic concept of the potential or actual interrelationships between the internal and external environment. Although defining context remains problematic,

particularly with regard to reconciling structure as a fluid concept and structure as a constraint (Caldwell, 2006), the explicit attempts to do so and to incorporate it into analysis serve to increase awareness and understanding of its role in shaping and mediating processes of change. While recent developments in the conceptualisation of context are implicitly addressed to some degree in both approaches, neither action research nor the processual approach has explicitly addressed them. These developments include the realisation that context is an interactive process rather than a backdrop to change (Dopson and Fitzgerald, 2005), that change is being differentially impacted by configurations of characteristics from the context (Dopson and Fitzgerald, 2005) and a move towards examining the interrelationship between actors and context.

Methodologically, while action research is executed via iterative action–reflection cycles, processual research can be done in a variety of ways. Although it is particularly associated with longitudinal and comparative case studies (Ferlie and McNulty, 1997), Dawson identifies four longitudinal designs that he deems appropriate for the attempt to 'catch reality in flight' (Pettigrew, 1997: 10). These are: (1) a retrospective analysis of the process of change, combined with a real-time study of the ongoing effects of the change under routine operation; (2) examining the process of change as it develops over time, by interviewing staff before and after a change, and collecting data during the process of change; (3) collecting data in organisations at different stages of change (conceptual, implementing or operating) and (4) phased data collection using different techniques. Although longitudinal, the approach is not congruent with the snapshot nature of quantitative surveys or cohort studies (Dawson, 2003). Typically longitudinal case studies are chosen to 'expose variation in outcome. The aim is often to expose patterns in the process within a relatively constrained set of organisations' (Ferlie and McNulty, 1997: 70). This multiple case study design aims to facilitate mid-level theory generation from the research. However, while the basis of data collection is clear, the form and nature of data analysis is less so. The processual approach lacks a coherent and universally accepted analytical structure, in contrast to action research's four-step process (Pettigrew, 1992).

The processual approach promises the description, analysis and explanation of the complex links between processes and outcomes

in changes. Within this approach, the aim is to provide both practical and theoretically relevant knowledge. However, its broad aspirations are also the basis on which the approach is critiqued. The predominant criticisms of the processual literature are that: (1) it can become over complex with little practical application (Dawson, 1994); (2) that individuals and individual change drivers tend to be neglected (Buchanan and Boddy, 1992); and (3) that it does not lead itself to practical recommendation (Watson, 2004).

In addition, the approach is also increasingly focusing on making practical, rather than theoretical, contributions, due to the nature of the market for process research in the UK, and the action-oriented nature of the output desired by funders (Ferlie and McNulty, 1997). They refer to a 'theoretical routinisation process', with a shift away from the generation of new theory, towards a concern with more applied problems.

Action research is more focused on contributing to effective action, a particularly valuable activity in bridging the moat between practitioners and ivory tower academia. Nonetheless, while action research has a narrower remit, in terms of emphasising its contribution to effective action and providing solutions to organisational problems, it also aims to contribute to the social sciences. However, its focus on establishing itself as a valid methodological approach and on engaging with practitioners has led to the discipline developing in an insular and methodologically focused manner. As a result it has failed to systematically link or integrate its contributions with broader theory.

OPENING DIALOGUE: COMPARISON AND CREATIVE SPACE

Having identified the key characteristics and critiques of each approach, this final section begins to open dialogue between them. Firstly, we systematically organise comparisons of the key dimensions of each approach. This provides a foundation for considering the creative space for dialogue between them, given the preceding critiques, discussion and the outstanding concerns of change management research.

Table 1 emphasises that both action research and processual research aim to contribute to theory and action, albeit with different

emphases and within different time-scales. Turning first to the theory–practice dimension, concern with assisting rather than objectively studying organisational issues has increased the pragmatic validity of action research relative to the processual approach. While the data from processual studies have been critiqued for being overly complex, and of little use to practising managers, action research focuses on providing practical solutions to specific organisational issues. In addition, it engages in monitoring the implementation and results of such changes, refining recommendations in response to issues arising. These differences are closely linked to the time orientation in each approach. While action research endeavours to assist organisations seeking solutions to *immediate* problems, processual research aims to analyse and explain, rather than guide, change processes, with a view to generating theory and recommendations for *future* action. Whilst the 'future' in action research refers to future actions within a given change process, in the processual approach it is more discontinuous, referring to guiding a completely different set of changes. The fact that action research emphasises action while processual leans towards theory provides scope for insight and dialogue. There is scope for the processual approach to contribute regarding moving from practice to theory and linking into broader debates. This would serve to raise action research's contribution to and profile in the social sciences. In contrast, processual research could benefit from greater pragmatic validity, particularly with regard to embedding change, areas in which action research has much to contribute. Thus the first space for dialogue is concerned with making contributions to practice more useful and with linking practice to theory.

There is no real scope for dialogue on the next two dimensions on the table: the philosophical underpinnings of each approach and the role of the researcher with regard to the change process. Philosophical differences provide the roots from which other divergences stem. This is evident in the conceived role of the researcher, which is closely linked to them. As a practice-oriented methodology, action research provides organisation-specific knowledge, facilitated by a researcher who acts as a change agent, either as a member of the organisation or through a consultant-type role. They

Table 1: Entering Dialogue

	Processual	Action research	Space for dialogue
Aims	To describe, analyse and explain the process of change, with reference to outcomes. To generate guidelines for action	To contribute to effective action and to the social sciences	Role of theory for action, particularly the nature of actionable knowledge
Time	Historical and contemporary action studied with some emphasis on future action	Historical and contemporary action, with future action emphasised	Balance between contemporary and future action
Philosophy	Hermeneutic with elements of positivism	Hermeneutic and critical realism	No basis for dialogue. Each approach maintains its integrity via its philosophy
Role of the researcher	Observer	Actor in change. An agent of action and reflection	No basis for dialogue. Some potential for debate regarding underlying model of change agency

(Continued)

Table 1: (*Continued*)

	Processual	Action research	Space for dialogue
Conception of change	Dialectic but can also be used to study planned change	Planned change	The political aspect of planned change
Methodology	Longitudinal case studies, often comparative	Participative cycles of action and reflection	Balancing context-specific and more broadly applicable knowledge
Contribution	Description, explanation, actionable knowledge	Actionable knowledge, sustainable outcomes	The nature of actionable knowledge; what is most useful
Context, history, process	Incorporated explicitly	Context and history incorporated implicitly, process explicitly	The influence of context and history

have an active intervention role, in contrast to the impartial passive observer role in processual research. Rather than watching how and why the change process unfolds in a particular direction, action researchers actively intervene to control and direct the process of change. To facilitate this where the researcher is external to the client system, action research has a developed literature on the nature of engagement.

However, whilst there is little scope for dialogue on the role of the researcher as change agent, there is scope for engagement regarding the underlying model of agency adopted in each approach. Drawing from Caldwell (2006), the centred, planned conception of the expert change agent is evident in organisationally (rather than socially) embedded action research, and a more decentred, emergent and internal conception of agency is evident in the processual approach. This decentred model is more appropriate for political contexts than the rationalistic model. The failure to adopt the broader conception of change agency in the processual approach has implications which have been recognised within action research, but which have yet to be addressed. However, introducing a political dimension of another variety, Schein (2008) noted that the quality of data engendered when a researcher is an employed by an organisation is much higher, with a greater commitment by organisational actors, and a higher level of access to data. Furthermore, the researcher as paid employee calls attention to the planned nature of change in action research. Table 1 indicates that while processual research predominantly focuses on dialectic change, it can also be used to study planned change from a more political perspective, creating space for discussion between the two (Poole and Van de Ven, 2004).

Methodologically, scope for dialogue exists in terms of balancing the demand for context-specific and more broadly applicable knowledge. Due to its foundations in rich context-specific data, action research is not typically associated with structured comparative research. Although comparisons can be drawn between projects, this is typically not done in a manner which aims to derive theory. One example of this is evident in the collaborative

CO-IMPROVE project (Coghlan and Coughlan, 2005). This entailed a collaborative research approach where researchers managed and studied the change process, while engaging with internal company networks and external research networks. In contrast, processual research is more oriented towards gaining understanding and building mid-level theory, to the end of guiding future action. As a result, while it is grounded in detailed and context-specific knowledge, it is more oriented towards gaining broader brush understanding. Crucially, however, Dawson (2003) is critical of this trend, which is being encouraged by Pettigrew's (1997) emphasis on linking to outcomes. This focus on outcomes has led to the adoption of comparative case studies, which make structured cross-cultural and international comparison more feasible than within action research. However for Dawson, this scaling-up away from the single case study is leading to the neglect of detail, which was the initial foundation of the approach. Nonetheless, by observing rather than directing the change, the processual research can be more broadly applied than action research.

This discussion has indicated that there *is* scope for dialogue between the two on a number of useful and far from esoteric dimensions. Given their historical distance from each other and taking dialogue as a first step towards development, this can be perceived as a highly useful exercise. This is particularly so, given the scope for each approach to garner insight from the other. However, scope for dialogue notwithstanding, this paper has also identified significant differences between the approaches. The philosophical differences and the different conceptions of the role of the researcher are highly significant and not reconcilable. On this basis it is arguable that the largest commonalities between the two are (1) their shared opposition to positivism and (2) their shared concern for the process of change. In addition, they have a shared conceptual framework, which takes account of the context, content and process of change. They also differ fundamentally in their concept of actionable knowledge. In fact action research explicitly contests the description of the guidelines produced from processual research as 'actionable knowledge' (Argyris, 2003). Thus, while there is much agreement at the periphery, there are

considerable differences in the core understanding of how to do research. This may stem from their historical development. While processual research emerged from an organisational context, action research, and particularly participatory action research, has not been so limited, being applied in social and community contexts as well as in organisations. Although, due to their underlying philosophical differences, the approaches will never merge, there are some lessons that can be learned via the process entered into in this context. More specifically, the processual approach may benefit from action research's close link to practice and pragmatic validity: the here and now concern with real issues and the quality of relationships in engaging with organisational actors during attempts to resolve issues and bring about change. Inversely, action research may benefit from the concern with linking to theory, explicitly considering context and the more political conception of change agency and the environment, which are inherent in the processual approach.

CONCLUSION

On the basis of this discussion and the schema outlined, it is evident that choice between processual research and action research, in their current guises, ultimately rests on five key choices. The first is whether the researcher wishes to contribute to the immediate and long-term needs of the organisation or to focus on gaining broader understanding with implications for the longer term, and potentially contributing to theory. Action research does not separate these and seeks to contribute to both. The second concern is whether the researcher is adopting a role as an agent of change or an observer, and hence their level of engagement with organisational members. The third consideration is whether the change process is planned or otherwise, while the fourth choice pertains to the degree of politicisation of the organisation, which has implications for the model of change agency that would be appropriate. The fifth and final consideration is the desire for structured comparison. As we have seen, the answers to these questions coalesce around the two approaches. Action research is associated with contributing to immediate needs, the researcher as agent, an exclusive focus on planned change,

a rationalistic model of agency and a tendency to collaborate rather than directly compare. As well as providing a basis for choice between the two holistic approaches, this paper has also drawn attention to the fact that comparing the two approaches leads to explicit concern with what Pettigrew (1992) describes as the dual concerns of scholarly quality and practical relevance in change management research, and the trade-offs between them.

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