KEYNOTE

Developing the practice of scholarship: The case of insider action research

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ABSTRACT

In this address I will recount and explore the development of my framework of insider action research as an exercise in developing a theoretical framework. Beginning from a practical dilemma in a seminar room and subsequent shared inquiry to the publication of a framework in five editions of a successful book, numerous articles and book chapters which have formed the basis of multiple doctoral and masters dissertations, I will ground my story in the process of interiority. I will use the address as an invitation for the conference participants to engage in the same process for themselves.

Introduction

It is commented that process of theorising is largely ignored, with the emphasis being generally placed on the theory as the outcome (Swedberg, 2014). Hansen and Madsen (2019) describe the process of theorising as attending not only to external data but also to the internal data of one’s own thinking and assumptions and engaging in a community through reading, talking, listening, questioning and writing.

At the heart of the process of theorising is what I have described as interiority, that is, where we are attentive to our process of coming to know (Coghlan, 2010). It is by attending to both the data of our consciousness, such how we are thinking, feeling, imagining etc as well as to the data of sense what we are seeing and hearing that we can engage with the empirical data of our experiencing, the intellectual data of our understanding in the process of discovery and the rational data of our judgments in the process of verification.

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The process of creating a model or framework begins from what one experiences and the questions posed to those experiences (Coghlan, 2021). The answers or understandings that emerge have to be subjected to further questioning to come to judgement that the explanation fits the evidence or whether there are alternative explanations. The outcome is a judgement to affirm the framework/theory. If not, the process of experiencing, inquiring and verifying continues. I provide an account of the development of the framework of insider action research as an exercise in theorising. I now provide an example of this process.

**Developing the framework of Insider action research**

The following narrative provides the story of the development of my framework of insider action research.

**Context**

In 1996 a colleague invited me to work with him on an executive masters’ programme. This was an action learning programme of over twenty-five years standing in which the participants, all senior executives, constructed a dissertation around a change intervention they were leading in their respective organisations. The module on which we worked was called ‘learning and research’ which provided methodological theory and support to their organisational change endeavours. I delivered several sessions and introduced the group to Lewin and the notion of researching-in-action.

**Experience**

At the end of the academic year that colleague left to take up a position in another university and I took over the module. I found myself in something of a dilemma. The action research literature seemed to view the action researcher as an external agent, e.g. Schein’s process consultant or Greenwood and Levin’s ‘friendly outsider’. Yet the executives in the programme were insiders in their respective organisations and were constructing and leading strategic and operational change from their managerial positions and were accountable to their superiors. I found that being in a seminar room with senior executives exploring action research as a method of leading change in their organisations and creating knowledge challenging and finding the paucity of materials on conducting action research as an insider disconcerting. I began to question what I was experiencing.

**Questioning**

My questioning took me in two directions. I wondered what the issues were for the executives in undertaking action research in their own organisations. As the lecturer I wondered what reading and conceptual resources I could find. Regarding the former question I listened to them and the issues they were identifying in their respective change initiatives. Examples of the issues they faced were: being astutely political in building support (from superiors, colleagues, trade unions, customers…) for what they were trying to achieve; learning to understand their organisations through applying analytic frameworks and tools; designing and making interventions; managing their careers; dealing with writing a dissertation on what they were doing in their job. The second direction was seeking what was in the literature. Evered and Louis’s (1981) article on inquiry from the inside and Fisher and Torbert’s (1993) book on executive action inquiry were foundational and I was greatly encouraged by accounts of people engaging in action research in their own organisations (Bartunek et al., 2000; Ramirez & Bartunek, 1989).

**Understanding**

While I found methodological foundations in action science and developmental action inquiry, I was not confident in adopting these approaches wholesale or rigorously. As I listened to the accounts of the executives’ endeavours, I began to build a picture of what doing action research in one’s own organisation entailed and to understand something of its challenges. I began to develop notes for the seminar sessions and to pick up the issues the executives identified as significant. I constructed that engaging in insider action research
involves attending to and managing their relationship and closeness to the organisation and the issues (which I framed as preunderstanding), holding both their executive and organisational roles alongside that of being an action researcher (which I framed as role duality) and managing organisational politics. These three elements became central to my emerging framework. Over the following two years these notes became more extensive and I began framing them as a book.

Judgement
I came to the judgement that I had an understanding of what insider action research entailed and consolidated this understanding in a book. The first edition of *Doing Action Research in Your Own Organization* was published in 2001 (Coghlan & Brannick, 2001). This first edition gave voice to a practice that was struggling for legitimacy and which hitherto had not been framed in a manner that facilitated its place in the action research literature. In the intervening years since 2001, further articulations of theory and accounts of practice have burgeoned through the second, third, fourth and fifth editions (Coghlan & Brannick, 2005; 2008; 2014; Coghlan, 2019) (with a sixth at the planning stage), articles in *Management Learning*, a special issue of the journal, *Action Research*, chapters in the* Sage Handbook of Action Research* followed and have consolidated the framework. Accounts of insider action research grounded in my framework appeared in journals. There is an extensive number of dissertations in schools of education, healthcare, nursing, business and social work that have not found their way into published articles. The accumulation of these confirmed my framework that insider action research is a valid approach and my framework that preunderstanding, managing role duality and organisational politics are the central elements. The practice of engaging in action research as an insider contributes to both the theory and practice of organisation development and change and of being a scholar-practitioner (Coghlan, 2013).

Table 1 illustrates, the framework began with my experience with the executives in 1997. I put my questions to the practical forum of hearing the concerns of the executives and to the theoretical forum of the literature. Both affirmed the validity and usefulness of the questions I was asking and pointed to the need for a framework that would address both practice and theory. The publication and consequent wide use of what I had produced confirmed its usefulness to both.

Reflection
What might be learned from this story of the development of my insider action research framework that contributes to developing the practice of scholarship for other action researchers? I offer three constructs to help answer my question: a philosophy of social science as a reflection on practice, innovation action research and theorising as interiority.

A philosophy of social science as a reflection on practice
The philosophy of social science emerged as an identity distinct from the natural sciences in the early twentieth century through the work of Dilthey who framed social science as essentially interpretative and evaluative. Social science is interpretive as it explores categories that do not apply to knowledge of the physical world, aspects of meaning such as ‘purpose’, ‘value’ or ‘development’.

In an exploration of social science as a reflective discourse, I, with two colleagues, discussed how the practice of social science is enacted through interiority, which is the process whereby people attend to the cognitional operations within themselves, that is, the data of their consciousness (Coghlan et al., 2019). Interiority involves shifting from what people know to how they know, a process of intellectual self-awareness and provides a way of recognising the competence of both practical knowing and theory and to meet the demands of both. It is keeping with this conception of social science as a reflective discourse that I engage in reflection for this paper.
Table 1
Developing a framework for insider action research

<table>
<thead>
<tr>
<th>Operations of human knowing</th>
<th>Questions</th>
<th>Insider Action Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>Judgement</td>
<td>Is my understanding true? How do I know it is so?</td>
<td>Confirmation through: i) observing and documenting practice of insider action research initiatives, ii) teaching, writing books &amp; articles, iii) confirmation through seeing impact in fields of practice &amp; scholarly writing, and iv) moving to advanced implementation.</td>
</tr>
<tr>
<td>Understanding</td>
<td>How do I understand what was happening?</td>
<td>1. Insiders have particular challenges. 2. There are no frameworks to guide insider action research. 3. Articulation of framework of insider action research: preunderstanding, role duality &amp; managing organisational politics.</td>
</tr>
<tr>
<td>Experience</td>
<td>What was happening in 1997?</td>
<td>I heard how managers express their challenges in undertaking action research in their own organisations. I read that, in general, the action research literature tended to take an outside researcher perspective. I engaged in a collaborative inquiry with course participants to explore their issues.</td>
</tr>
</tbody>
</table>

Innovation action research

The second construct on which I wish to draw for this reflection is Kaplan’s notion of “innovation action research”. Kaplan (1998) explores how scholars are actively engaged as active change agents in helping to create, implement and test new ideas and emergent theories. In this way they may act as action researchers. Kaplan presents an action research cycle of (i) observing and documenting practice, (ii) teaching and speaking about it, (iii) writing articles and books, (iv) implementing the concept, and (iv) moving to advanced implementation. Kaplan’s cycles offer a conceptualisation of the development of a practice through the activities of teaching and writing, a practice not explored within the action research field heretofore.

In my 20 years of observing and documenting practice, teaching and speaking about insider action research, writing articles and books, thereby implementing the concept, I have enacted Kaplan’s notion of innovation action research. While in the innovation action research cycles I have been exploring how scholar-practitioners have been implementing action research in their own organisations and communities and capturing the dynamics that give action research in insider settings its distinctiveness, I have brought the action research process to my writing and teaching (Figure 1). Thus, I offer an application to readers who are teachers and writers.

Theorising as interiority

Swedberg (2014) describes theorising as the process of what one does when producing a theory. It is grounded in the thinking that researchers do in seeking to explain data, to reduce complexity and to create better understanding and as occurring within the contexts of discovery and verification. It is located in cognitive operations, such as thinking deeply, speculating, guessing, supposing, conjecturing, hypothesising, conceiving, testing and explaining. As several authors comment,
attention to the process of theorising is generally neglected in the social sciences with the emphasis generally being placed on the theory or framework as the outcome.

Hansen and Madsen (2019) describe the process of theorising as attending not only to external data but also to the internal data of one’s own thinking and assumptions and engaging in a community through reading, talking, listening, questioning and writing. What Hansen and Madsen are describing is the process of interiority, though they don’t use that term. Interiority is where we are attentive to our process of coming to know and can hold the demands of scientific or theoretical and of practical knowing without confusing them (Coghlan, 2010; Cronin, 2018). It is by attending to both the data of our consciousness as well as to the data of sense that we can engage with the empirical data of our experiencing, the intellectual data of our understanding in the process of discovery and the rational data of our judgments in the process of verification.

Hansen and Madsen make a further important point, namely that theorising takes place within a community, or as they put it our ‘academic family’. Our thinking is informed by the authors we read, the community of this conference and association and, of course, the practitioners with whom we work as co-researchers on the issues of concern. It is through the dynamics of co-inquiry that our scholarship is practiced and that theory is developed. I’ve been blessed by the shared inquiry with practitioners and other scholars into the dynamics of insider action research through which the framework has emerged, explored, confirmed and implemented.

**Interiority and the scholarship of practice**

Bringing together my experience, understanding and judging of how I came to develop and promote a framework of insider action research, what then am I offering you from this story and reflection? In action research theory is developed in and through action. My experience with the executives in 1997 led me on a journey of questioning, discovering, understanding and evaluating over 20 years in the mode of action research, and which I can frame in terms of Kaplan’s innovation action research cycles. At the core of this journey was my attentiveness to how I was coming to know, a process I call interiority. In a broader context
interiority is at the heart of theorising within the social sciences as theorising is based on the operations of thinking, discovering and conversing. Following Schein (1993) I am framing this process as “creative opportunism” which he describes as combining a learned caution and careful assessment leading to a skill in seeing and seizing new opportunities as they present themselves.

**Conclusion**

What I am offering in this presentation that you, the audience, hear my story and my conceptualisation of the process of framing a well-known and accepted framework of the dynamics of insider action research. I am providing a structure for understanding the processes of developing a scholarship of practice as creative opportunism. It begins from experiencing. For the action research scholar practitioner experiences are grounded in confronting social and organisational issues and emerging questions are posed to those experiences in collaboration with those who experience these issues. The answers or understandings that come have to be subjected to rigorous scrutiny in the light of the enactment of cycles of participative action and shared reflection as to how they address the issues and contribute to the cogeneration of actionable knowledge. The outcome is a judgement that it is indeed so and the model/framework is confirmed. If not, the process of experiencing, inquiring and testing continues. I invite you into considering how you can be creative opportunists and theorise through your action research practice and advance the practice of your action research scholarship for an audience.

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