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Constructing a Research Strategy in a University Nursing Department: A Cooperative Inquiry.

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A project report submitted in partial fulfilment of the requirements of Sheffield Hallam University for the degree of Doctor of Professional Studies

March 2011

Abstract

This doctoral report details the findings of a ten month project conducted in a university nursing department. The project used cooperative inquiry to engage teachers of professional occupational courses in research. This project has relevance for all university departments exploring ways to develop a research culture in a predominantly teaching environment.

The New University, where the project was set, committed the organisation to raising income through research and teaching where previously it had been through primarily teaching contracts. The inclusive research strategy required all teachers to become 'research active' and produce research outputs that met the Research Excellence Framework (REF) benchmarks. This approach was part of the university strategy of 'authority to teach' that required all teachers credibility to be provided through the primary research the academics were engaged in. This was a significant change for teachers whose credibility came through occupational professional qualifications and expertise and who had little experience of research.

The project focused on the collaborative development of a departmental applied research. It was hoped staff would have ownership of the strategy that would facilitate the engagement in research and create a cultural change. The project findings highlighted that an occupational teacher identity was deeply imbedded as part of an occupational career trajectory. This led to a recognition that change would need to address the teacher identity not simply focus on raising the status of research as part of an academic role. The project addressed this through the development of a research strategy that incorporated a 'Scholarship Model' that broadened the notion of scholarship. Instead of research providing academic credibility, the model valued teaching and a variety of scholarly endeavours that included research to provide academic credibility. This was used to create a scholarly culture that moved the department towards a longer term goal of developing research active staff for the REF submission.

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Acknowledgements

This doctorate report is dedicated to my partner Jane, who has been my support and encouragement throughout the whole process. Thank you for all the cups of tea and your patience through a long process. You helped me to keep going when I felt like giving up. I would also like to give special thanks to my Director of Studies, Kay Phillips and my supervisor, Cathy Hill for their continued support. Cathy in particular has been tough, but always encouraging and helped me finally put the work together for submission.

The real voyage of discovery begins with not visiting new places but in seeing familiar landscapes with new eyes."
(Marcel Proust 1922)

Introduction to the doctorate report

This doctoral report aims to provide an insight into a project, within a university nursing department, which used cooperative inquiry to facilitate research engagement by the staff whose role was primarily teaching. This was a voyage of discovery that opened my eyes, to what has become a familiar landscape in universities that all teachers need to be research active to provide credibility for the teaching they are engaged in. What I thought would be a process of implementing organisational change through a collaborative process, resulted in a challenge to my understanding of the research-teaching interconnection for teachers of occupational courses in higher education (Appendix 1, glossary). The outcome was a recognition that change would need to address the deeply embedded teacher identity for occupational teachers and a rediscovery of the concept of scholarship for academics. The project addressed this through the development of a departmental applied research strategy that incorporated a 'Scholarship Model' that broadened the notion of scholarship. The model did not simply explicitly focus on research to provide academic credibility. Instead it valued teaching, a variety of scholarly endeavours and research as a way to facilitate the development of knowledge within a scholarly academic role. This was a step towards a longer term goal of enabling teaching staff develop a portfolio of scholarly work that included research that could be submitted for REF submission.

The report is set out in three parts to illustrate the evolving journey of the project:

(1) Part One – The Development of a Project;

This sets the project in context and provides a rationale for the inquiry. The discussion will then lead into an iterative account of how the epistemology, methodology and methods developed.

(2) Part Two - Findings, Interventions and Developments;

This section illustrates the interrelated nature of the learning process, research outcomes and the development of a departmental research strategy. Although the findings (research and learning outcomes) are interrelated, they are separated into two chapters to provide a logical and readable format.

(3) Part Three - Reflections and Conclusions.

This includes a final summary of my inquiry journey and reflections. Part three explores the challenges to my understanding of the role of research in higher education and the relevance of the inquiry for occupational teachers.

PART ONE

Introduction to the Development of a Project:

Part 1 is divided into three chapters that provide the context for the project.

(1) Chapter 1 - Presenting Cooperative Inquiry as a Project Report;

This chapter explores the conventions and creative tensions of presenting a report that attempts to capture the iterative nature of action research and meet the requirements of a doctorate.

(2) Chapter 2 - Justification and Rationale for the Project;

This chapter explores the justification and context for the choice of an action research project.

(3) Chapter 3 – Setting the Project in Context.

This chapter is not a literature review, expected in a traditional thesis, as the inquiry is data not theory driven. Instead, chapter 3 uses some literature to place the inquiry into a national context.

Chapter 1.0 – Presenting Cooperative Inquiry as a Project Report

1.1 Introduction

This chapter outlines the challenges and tensions of presenting the iterative nature of cooperative inquiry in a text based report that meets the requirements for a doctoral submission. Both doctoral reports and cooperative inquiries have a number of conventions that, at times, can cause creative tensions. I will discuss how the tensions were resolved around the following considerations:

- How should the report be authored?
- The academic conventions of a doctoral report;
- Capturing the evolution of an action research inquiry.

1.2 How should the report be authored?

Authorship and the audience fundamentally shape the structure of any written work. I have written this report as a submission for my doctorate without the full collaboration of the inquiry group. A cooperative inquiry is a collaborative endeavour, but writing up this study for a doctorate as a whole group exercise was impractical and unrealistic since the report was intended as a single submission as part fulfilment for my doctorate award. Reason (1988) acknowledges the ideological tensions of the requirements of a report that is a candidates own work and the collaborative endeavour of action research. He suggests the problem can be solved:

> *"...because the student can be seen as the 'primary researcher', and can write their view of the study in some form of consultation with members of the group."* (p 38-39)

This suggests it is possible for one person to write up their part of an inquiry as long as the report identifies who was involved and the status of the writing.

The project group understood I would use the project as my thesis for a doctorate submission, but as I came to write up the report I explored how they wished to be identified and offered access to the developing report. Most of the group acknowledged that they were already known by, and agreed to be known by, their first names. For those who have not responded I used a pseudonym. Although I invited comments on the developing report only one member of the group gave me feedback. My doctorate supervisors also read the report drafts and recommended some minor changes. For the most part, this is my account of my view of the learning and outcomes as part of a cooperative inquiry. While this appears to resolve the question of validity, Heron (1996) refutes this going so far as to suggest that it creates;

> *"...a limitation on any claim that the findings of the inquiry are based on authentic collaboration."* (p102, Heron 1996).

This appears to suggest that by limiting collaboration in writing the report is somehow less valid as a source of 'lived experience'. However McArdle (2004) cautions that rather than seeing exclusive authorship as less collaborative, and therefore less valid, we should:

> *"...see the written account as just one way of sharing the propositional knowing we have gained from inquiry, then we can see it as more data to inquire into, rather than as the final truth that speaks for all participants".* (p24)

Rather than the report appearing to be an example of my exclusive authorship, it presents the 'knowing' I have gained from inquiry. It was not my intention to exclude the other members of the inquiry group, but to reflect the collaborative nature of the project by using direct quotes give the report authenticity. This

challenged me to consider what I meant by 'authenticity'. I used the words of the inquiry group and the wider department but I chose the quotes and constructed the report. This questions how far I can claim authenticity for the leaning of the inquiry group. I needed to present my own account of learning for the doctorate submission but still have confidence that my story had validity and judged a fair account of the project. This is not to suggest my story has validity just because I say so, rather it is to recognise that each member of the inquiry group (including myself) may have different perspectives of the journey, and this report documents my learning as part of the writing up process. As Richardson (1994) suggests, writing is a method of inquiry as it utilises self-reflection and sense-making. This indicates that there is an evolution in the type and level of analysis through the writing up stage. The difficulty of this approach is that the inquiry was part of a collaborative endeavour whereas my sense making was a single, not a collective, authorship. However as McArdle (2004) suggested, owning one's story is a way to give recognition to the work of the inquiry group. My aim in this report is to represent my learning through the project, but I have contextualised that learning through quotes and illustrations, which recognises the work of the cooperative inquiry.

1.3 The academic conventions of a doctoral report

At the beginning of my doctorate report, my supervisor suggested that I move away from a first person writing style as the report would appear too subjective. Attempting to write in this way proved unsatisfactory as in the process of writing I was still attempting to capture my learning and accessing literature to make sense of the study. In essence it was a story unfolding. This led me to consider how to capture my role and learning in the untidy evolution and incongruities of writing up the inquiry.

1.3.1 Third person writing style

This report is the submission for a Doctorate in Professional Studies that is described on the SHU website as being;

> "*...equivalent to PhDs but focus on the development of professional practice and suit the needs of experienced professionals.*" (SHU, 2009)

This is important as the nature of the report of an occupational practice project is not presented as a traditional PhD thesis. The doctoral report may not require a particular writing style but the nature of the project, built on my professional experience, suggested my presence in the report needed to be transparent.

McNiff (2007) suggested the convention of the third person in writing a narrative can render the researcher's role in the project invisible and give the impression of an objective stance. The apparent objectivity has been challenged through the contributions of post-structuralist and post-positivist epistemology as a myth (Lather 1991, Reason 1998). The researcher is an integral part of the interpretation of any research but the researcher presence is not always transparent. For action research, the researcher is also the researched (Wadsworth 1998) so it was epistemologically inconsistent to write a report that did not bear my hallmarks as the author (Lincoln & Denzin 2000). The construction of my presence in the process was integral to the doctoral report, so I needed to expose my subjective position and articulate the influences and choices in designing and implementing the inquiry. Some other action researchers have attempted to cope with academic conventions of doctoral writing by using a mixture of first and third person writing in published reports (for example Oates 2002, Lovering 2004). While this is an option, it tended to disguise the researcher presence in some parts of the inquiry processes. So I decided to maintain the first person narrative throughout this doctoral report.

1.4 Capturing the evolution of an action research inquiry

Capturing the evolution of the cooperative inquiry using a doctoral thesis format proved challenging as a thesis assumes that it is possible to write about each aspect of the research process in isolation. Winter (1998) noted an action research report is more of a collage, drawing on a wide range of interpretative processes to interrogate the subject, rather than a highly structured account of a research situation. Davis (2007) described the action research narrative as an account of a "*story unfolding*" (p 182) that deepens our understanding of the motivations and values behind the story. Action research is not a linear methodology that can be tightly designed in advance (Barge & Oliver 2003), as the inquiry is in a constant state of emergence (Davis 2007). This could be viewed as an imprecise form of research that changes the shape and scope of an inquiry. However it is this quality in action research that enables an understanding of complex situations, which can shift over time. Ramsay (2005) suggested that an action research account needs to reflect this evolution, which may provide more possibilities and questions rather than any firm conclusions. Thus my intention in this report is to make the evolution of the project and my learning transparent as the story unfolded.

1.4.1 The literature review

The emergent nature of action research has a particular relationship with the literature. Beginning with an in-depth literature review was unhelpful as it assumes a conventional theory driven process. Whereas the collaborative nature of the research is not grounded in prepositions but human activity that draws on different forms of 'knowing' to account for the changing nature of situations. It is essentially data driven. The iterative nature of cooperative inquiry requires the researchers to access the literature repeatedly (Fisher and Phelps 2006) to enable tentative interpretations of the emerging data. The discussion and literature review is not a separate process from the data

collection and analysis but integral to it. Arguably all researchers use this process and revisit the literature during the data collection and analysis but don't explicitly reveal this process. Whereas in action research, the articulation of the integrated process provides a deeper understanding of the issues by revealing how the final conclusions are agreed (Richardson 2000). Literature is weaved through each cycle to create a 'dialectical validity' (Winter 1998) placing the study in a wider emerging theoretical context rather than from a theoretical foundation. Thus I propose to provide some literature to provide context for the project but weave the main body of the literature throughout the report to illustrate the iterative nature of the journey.

1.4.2 Structuring the doctoral report

The tensions of presenting an iterative report caused me to rethink the construction so that it represented an authentic account that still met the rigour of doctorate level. Although Richardson (2000) indicated there was no single or right way to stage a text, the challenge was to capture the study in a way that leads the reader through the process in a coherent way without losing sight of the complexity of the human dimension.

As the study progressed, it evolved through an interlocking and overlapping process of a literature review, data collection, data analysis and interpretation. Actions led to more investigation, which then generated reflections and the exploration of more literature that led to change and further analysis. Lincoln (1997) used the term 'portrayal' that:

> *"...crafts compelling narratives that give outsiders a vicarious experience of the community" (p 23)*

Brodkey (1987) indicated that a vicarious narrative requires both description and critique. The critique becomes an interruption in the description of the story

to provide analysis and communication of new ideas. This suggested that an iterative process could be represented through a retrospective critical reflection of the way the relationships, understandings and practice developed. Instead of the traditional sequential chapters of a report, the structure needed to highlight the interdependence of events, which integrated a critical narrative with the methodology, literature, analysis and reflection. This critical narrative is not simply describing the inquiry but by using *"compassionate confrontation"* (p483, Mellor 2001) to challenge the emerging story. This approach does not readily lead to a convincing case for the presented findings but rather provides a framework to discuss the dilemmas and possibilities and a way to represent the evolving story of an action research project.

The danger of using this form of critical narrative is the possibility of a rambling structure, which does not clearly signpost the distinction between the narrative and retrospective reflection, making the story difficult to follow. The conventions of a doctoral thesis still require a coherent text format and so the report structure would need to be clearly articulated. Inevitably, despite intentions to the contrary, the story may lose some authenticity by the deconstruction and reconstruction to fit within a text based framework. However this approach is necessary to enable communication with the report audience. In part this was addressed by allowing the story of my learning to unfold as a descriptive narrative and signposting where my learning developed as a result of writing the report. Winter (1996) suggests, this approach is more compatible with a role as an author, collaborator, and participant within an action research study.

Chapter 2 - Justification and Context for the Project

2.1 Introduction

This Doctoral project was opportunistic and developed in response to the university requiring me, as the head of a department, to meet applied research targets in a mainly teaching environment. The aim was to use a cooperative process to develop a departmental applied research strategy as a way to create change. The use of a collaborative and negotiated strategy could facilitate ownership and engagement with research as a way to meet the departmental research targets. Although the project was initiated by the organisational research agenda, the choice of methodology was influenced by my role as a head of a department; the need to be pragmatic; and my desire to complete a work related doctorate.

The chapter is divided into three sections to consider the effect of these drivers under the following headings:

- A personal context;
- The ethics of an insider role;
- The organisational context;
- The management of change.

2.2 A personal context

My position in the inquiry has been influenced not just by my various roles as a researcher, head of department and also the professional experiences that have shaped my world view. My 30 year nursing career has spanned both clinical and educational roles in the National Health Service, schools of nursing and higher education as a practitioner, teacher and manager. This career

trajectory led to my appointment, in March 2005, as the head of a department where this inquiry is set. My occupational experience provided me with a broad understanding of the educational, political and social context for the departmental project. During the 1990's I was part of the transfer of nursing education into higher education and I witnessed first hand the mixed responses, and at times antipathy, to engaging with an academic research culture. It was likely that my interpretation of the department context was likely to be influenced by these experiences. I was mindful of the warning by Robson (2002) against partial understanding of the insider researchers that can lead to *"preconceptions about issues and solutions"* (p 535). It is difficult to know the impact of my partial understanding, but I was aware that my experience did influence my desire to explore why occupational educators were reluctant researchers. What was clear was I needed to find a methodology that enabled the voice of the staff to emerge so that my analysis as a researcher was not overshadowed by my career history.

As part of a department I am what Shultz (1976) has described as, part of the *"in-group"* (p108). That is an insider with access to the group past and a present history that enables the development of an 'emic' account of a project that is meaningful to those involved (Trowler 2011). Hockey (1993) indicates an insider has insights and sensitivity that are not open to an outsider researcher. However, for me, this was a new role so the *"pre-understanding"* (p335, Coghlan 2007) or *"lived experience"* (p57, Gummesson 2000) usually afforded to insiders was limited. Towler (2011) suggests that 'insiderness' is not a fixed value and in some situations the insider may be viewed as a stranger. As a head of department I may not be viewed as a colleague and it was likely that, at times, I may be placed in the position of a stranger and outsider. Conversely as a nurse with experience in higher education I may be considered an insider. I found it difficult to position my identity as either an insider or outsider. Carter (2004) indicated that because of the complexity of insider – outsider roles, it may be best to conceptualise the role on a continuum, between insider and outsider, rather than viewing them as binary opposites. However, this did not

address the ethical implications of using my role as a researcher and head of department for a doctoral project.

2.3 Ethics of an insider role

I was proposing to use my doctorate to meet a university target that had the potential to blur the boundaries between my academic and employment roles that could be construed as exploitative. The dual role I inhabited also raised a number of ethical questions about my position and access to the departmental staff to collect data for both the departmental and the doctorate project. I was aware I needed to ensure that safeguards were in place to ensure that my position as a head of department didn't undermine my role as an ethical researcher.

The use of action research appeared to ameliorate some of the ethical tensions of my hierarchical role through a collaborative approach. However collaboration did not address the potential blurring of the ethical safeguards for both the departmental and the doctorate project as the two projects would run concurrently. I was aware that the ethical considerations of the department and doctorate research projects would need to be rigorous, as in any research, but there was a need to ensure that there was transparency so the ethical tensions and the safeguards put in place for the doctoral project were evident.

2.4 The organisational context

The development and expansion of the university, where this inquiry is set, was through occupational health and social care teaching contracts. This meant the staff had been appointed for their professional qualifications and clinical expertise. The proposed change to become a more research-focused university was a significant change both for the university and the department.

The emphasis on research was precipitated by the reduction in income from teaching contracts and the appointment of a new Vice Chancellor (VC) in 2005. The VC committed the university to raising research income where previously it had been through teaching contracts. The university 'Applied Research Strategy 2005-2010' (Marshall 2005) encapsulates the main drivers for the change. It brought together applied research, teaching and commercial applications described as *"third stand activities"* (p1, Marshall 2005). This strategy was a driver for other changes including the teaching and learning strategy concept of '*Authority to Teach'* (p 2, Learning and Teaching Strategy 2005-2010). The university concept of 'Authority to Teach' was founded and informed by the primary research projects academics are engaged in. The approach was inclusive and all staff were expected to become research active to improve the university REF submission (through peer reviewed publication's, submitting and achieving external research bids). The strategy was to impose departmental research targets as a way to create organisational change.

The department did not derive any funding from research; instead income was through teaching contracts funded by the Strategic Health Authority for pre-qualifying and post-qualifying health courses. The department accrued significant funding but the limited research outputs meant it is seen as 'out of step' with university research aspirations. The university initiative was to improve the research outputs through the creation of an academic teaching and research role. This approach appeared to be rejected by the department academic staff, at a departmental meeting, who stated they were teachers not researchers. It would be easy to assume the departmental resistance to change was simply a reaction to the recent organisational changes. The appointment of a new VC had heralded a significant shift in the university's focus and the resistance could be a natural response to this. However the reluctance of the occupational teachers to engage with research also echoes a national trend that began as occupational courses were amalgamated into higher education (Carlisle et al 1996 Kenny 2004, Carr 2007).

The move to higher education that began thirty years ago precipitated a clash of traditions where occupational teachers valued practical and interpersonal skills while, universities traditionally gained kudos through theoretical, propositional and research knowledge. It would be reasonable to assume that the dichotomy has receded since the amalgamation, but anecdotal evidence suggests this polarised dichotomy still persists (Carr 2007). The effect has been that universities still view occupational courses, nursing in particular, as resistant to change (Camiah 1996, Meirs 2002, Kenny 2004). This is a narrow stereotypical of a complex situation that does not take account of the policy and social changes of higher education in the last thirty years. Any changes may not only need to address a culture that is viewed as intransigent and also the impact of a teaching culture that values occupational practice not research.

The university attempt to create change by imposing research targets on each department but this did not address the deep rooted teaching culture within the department. Action research could provide opportunities for a constructive dialogue with the departmental staff to gain their views and engagement to empower change. Whether it would be possible to create negotiated change in the context of a target driven organisational culture was difficult to predict.

2.5 Management of change

In managing change the university set objectives for the department that required all teachers to become research active, which reflected a mechanistic management approach to change. Burns and Stalker (2001) made a distinction between 'mechanistic' and 'organic' organisational management cultures. Mechanistic systems are bureaucratic, so boundaries and role functions are set for the individual who is told what to attend to and what is expected. It has a hierarchical structure of control and communication (top down). Although views of individuals are sought in change processes the tendency is consultation rather than collaboration. Whereas in organic systems the individual is

responsible for contributing their specialist knowledge to a problem that is collaborative (bottom up). Systems are not defined by functions but by skills and knowledge. One important corollary of organic systems is that although they are not hierarchic (in the same sense as mechanistic) they remain stratified. Decisions are frequently taken by the most senior with the presumption that they are the most informed and capable.

The mechanic and organic management approaches imply a dichotomy but may represent polarised viewpoints. In reality many organisations operate using a mixture of espoused and sometimes contradictory structures. This university would describe itself as an organisation that works to promote autonomy and creativity in teachers (organic structure) to improve the learning experience of the student, but employs a mechanistic model (and at times bureaucratic) method that uses cost effective efficiencies to meet output targets. The university approach to changing the research culture would suggest the 'dominant voice' (Stacey 1996) of the organisational management is mechanistic.

Using action research was both politically expedient and pragmatic in its approach to problem solving. Action research was likely to be endorsed by the organisation as the outcome was likely to be perceived to be of benefit in a mechanistic organisation. Enabling the authentic collaboration of action research in a mechanistic organisation would be challenging.

2.6. Change theory

Action research is, by nature, a process to create change and I was drawn to Lewin's (1946) pragmatic and planned change approaches. Lewin described four approaches to change including Force Field Theory, Group Dynamics, Action Research and the Three Step Change Model. I don't intend to explore all

aspects of the theory but to use the change model to visualise the process that is embedded in my approach to organisational change.

Lewin (1946) characterised change in three basic stages: '*unfreezing-change-freezing'*. Change occurs when there is a recognition of the need for change and exploring the root courses of inertia and defense; beginning to dismantle the existing mindset (*unfreezing)* where there is an awareness of challenge but there is no clear strategy to replace them (*change*); and finally the third stage (*freezing*) is a crystallizing of new ideas and practice. For the department there was a need to dismantle the understanding that the role of academics was simply as a teacher (*unfreezing*), explore what was needed to create a change through discussion and feedback (*change*) and using this understanding to develop into an applied research strategy (*freezing*). This is perhaps an over simplification of the model, but it exemplifies a pragmatic approach to change (Cole 2004, Briggs 2006).

The use of the Three Step Change Model has been criticised as being simplistic and linear advocating a top-down approach to change (Burnes 2004) that could simply endorse the university approach. This mechanistic approach is in contrast to the negotiated approaches of action research. This criticism assumes all change has to be initiated through a bottom up approach. Whereas, regardless of who identifies the need to change, effective change can not take place unless there is a need recognised by all those concerned. Lewin (1946) did not see one group or individual dominating the change process but saw everyone as playing an equal part. Although the change was being driven by an organisational top down initiative, action research still has value for empowering staff in the process of change.

2.7 Summary

Using action research provided an opportunity to work collaboratively to create

a departmental applied research strategy by taking account of the staff views and perspectives. The study was not without some significant challenges in changing a teaching-focused role to include research. Although the inquiry is both driven and constrained by the university research targets, action research could provide a way to engage staff in the process of change through a shared ownership of a departmental applied research strategy.

Chapter 3 – Setting the Project in Context

3.1 Introduction

Chapter 3 is not a literature review, as expected in a doctorate thesis, as this inquiry is data not theory driven. Instead the chapter will provide a political, professional and social context for the departmental inquiry.

There have been significant changes to higher education since occupational education moved into university settings that began more than 30 years ago. The political and professional drivers for occupational education to become part of university education were complex (Kenny 2004) and are not easily unravelled. It is not my intention to provide an explanation for the move, but instead consider some of the implications of the transfer of occupational educators within a changing university setting.

In the last two decades, government policy and economic drives have resulted in the elite distinction previously afforded universities and "*...other institutions of higher education that are producing a talented skilled workforce"* (p12, Denham 2008) to be blurred. 'Higher education' is often used interchangeably with 'University' and some long established universities have viewed the change of allowing other institutions to offer degree awards in response to the demands of market forces (Rothblast 1997) as undermining and sacrificing the historical elitist purpose of university education (Gibbons 1998). The effect has been a debate on the nature and role of the university (Denham 2008) and the research and education role of the academic. Educators of occupational courses have been caught up in the discourse on the nature of university education and the role of research as part of an academic role (Bai et al 2008). This debate forms the backdrop for changes in this New University that expects all teachers, including those from a professional occupational background, to become

'research active'. To provide the context for this change and the departmental inquiry this chapter will briefly explore the following:

- Occupational education in higher education;
- Educators in higher education;
- Changes in higher education;
- Teachers as researchers;
- Research capability and capacity.

3.2. Occupational education in higher education

The move of occupational health and social care education into higher education began in Britain in the late 1980s. The change created a catalyst for a occupational discourse that vacillated between the benefits and dangers of university amalgamation (Lyons 1999, Meerebeau 2001, Sparkes 2002). The debate brought to the surface the traditional arguments about whether the work required education to perform high level critical judgements, or it was a 'practical training' learnt on the job (Salvage 1988, Lyons 1999, Sparkes 2002). Concerns about the practical competence of students also bubbled in the debates in many other occupational groups such as social work (Lyons 1999) and nursing (Bradshaw 1997, 1998). Some considered that giving courses academic currency distanced the occupational teachers from service priorities (Meerebeau 2001) and practice (Lee 1996, Ioannides 1999, Cave 2005, Trimble and Fisher 2006). Others considered the closer association with higher education as a way to transform the academic status of occupational groups (Crotty & Butterworth 1992, Lyons 1999, Sparkes 1999, Bonello 2001, Morris 2002) and an opportunity to develop an academic research culture (Lyons 1999, Sparkes 1999, Meerebeau 2001, Bonello 2001). What is clear is the move to higher education marked an ideological shift from vocational technical training to professional occupational academic status.

It may be argued that the early disputes no longer have any relevance. Yet similar arguments seem to be emerging once again as nursing becomes an all graduate profession (Thompson 2009). The debates range from the need for higher education to recognise the role of clinical practice as a way to enhance student education and for educators to retain clinical credibility (Cave 2005, Carr 2007), to the need for university educators to become researchers to promote academic credibility (Dall'Alba & Barnacle 2007, Carter 2007, Thompson 2009). The implication that occupational and academic cultural differences continue to clash may be a simplistic view of a complex situation, but the continued debate suggests the issues still have relevance for this inquiry.

The effect on the educators, as part of the amalgamation into higher education, was evaluated during the transition with a focus on the need to develop academic (Carlisle et al 1996, Lyons 1999, Sparkes 2003) and research skills (Thomson & Watson 2001). Much of the early and more recent literature documents the transition but fails to address how to enable teachers to adapt to a new environment (McNeil 1997, Macarthur-Rose 2008), or how research could be integrated into an educator role (Lyons 1999, Kenny et al 2004).

3.3. Occupational educators in higher education

The move of occupational health and social care occupational courses into higher education has been described as a linear transition from practice into education, which was *"a passage from one social status to another"* (p 634, MacNeil 1997). A 12-year longitudinal study by Diekelmann (2004), reported that nurse educators felt isolated and alienated on entering the culture of higher education. The effect appeared to be role conflict due to the dual accountability of the occupational role as teachers and practitioners and the expectation of academic credibility through research.

Lyons (1999 found the dual accountability of social workers was managed by focusing on their occupational identity and specialist education rather than as academics.) Although the data was drawn from the heads of social work departments, it highlighted an identity tied to clinical practice not higher education. This suggests difficulty in letting go of previous affiliations and a lack of adaptation to their new role. The lack of 'belonging' is not exclusive to educators of health and social care courses as studies of educators of teachers in the UK (Sikes 2006) and America also indicated they felt "*uneasy residents in academe"* (p 312, Ducharme 1996). This raises questions about changing an educator's role that may be based on a professional not an academic research identity.

3.4 Changes in higher education

When considering the impact on an educator's role it is important to recognise that UK universities in the last thirty years have also undergone significant changes. Government policy changes have edged universities towards a mass market with knowledge becoming a business commodity (Jarvis 2001). To cope with the expansion, universities recognised that if they were to survive in the market place they needed to address the relationship between student recruitment, employers and research (Lynch 2006). Competition for funding, both through student and research contracts, among UK universities became more intense when polytechnics were re-designated as universities through the Further and Higher Education Act (1992). The loss of the binary divide between universities and polytechnics meant that polytechnics, traditionally teaching organisations, now joined the competition for research funding.

The market in higher education was firmly fixed by the contentious 2003 white paper on further and higher education (DES 2003). The paper stated that higher education needs to cease *"to be the preserve of a tiny elite"* (p2, DES 2003) paving the way for an increase student in numbers. In addition, the 2004

Further and Higher Education Act (DES 2004) introduced the variable 'top up' annual student fees edging higher education into a consumer led market, which has become an accepted part of university funding. The change to higher education has also been echoed in treasury reports, including the Lambert Review (HM Treasury 2003), which emphasised a closer proximity between universities and business as a way to exploit innovations commercially. The Leitch report (2006) also emphasised employer engagements and a 'fully demand-led' provision. This led to recognition that education as a business commodity was being normalised in public policy (Lynch 2006). Universities began to exploit opportunities to maximise funding opportunities (McNay 2007). The production of knowledge and ideas are still a central facet of higher education but from a financial perspective. As Thompson (2009) suggested;

> *"...it is fashionable to talk about the knowledge economy, knowledge transfer and knowledge producers, brokers and users..."* (p694).

Teaching and research as knowledge have always been part of all universities business (Jarvis 2001) but commercial pressures have contributed to new universities competing for research funding (Ball 2007) previously the prevue of traditional universities. New universities are driven:

> *"...by the desire to win international and national recognition, that are closely associated with the research performance of their academic staff."* (p9, Bai et al 2006)

3.5 Teachers as researchers

The inter-connection of research and teaching been regarded as a fundamental feature of a university academic. Henkel (1997) argued that British academics held values embodied the assumption that all academics should experience an

"interdependence of at least teaching and research." (p134). The way in which teaching and research is interconnected is contingent on the policies and nature of the university. In the UK, there is a contrast between the work of traditional universities and new universities. For many traditional universities, research has been the focus of the work of all academics developing a portfolio, which contributes to the REF (previously the RAE). In contrast new universities income is mainly through teaching contracts. Although there is no longer a distinction in status as a university, a binary divide still persists created by the distinction between those traditional universities with a REF funded research portfolio and the new universities that do not.

Increasingly new universities are beginning to emulate the old universities by combining research with teaching, focusing energies on performing well in the REF to secure possible funding (Ashwin 2006). However the attempts of new universities to increase income through the research funding exercise maybe unrealistic. The REF has been criticised as an approach which awards those who have a track record of research (Traynor & Rafferty 1999) favouring pure science over applied or practice based research (Piercey 2000, Goodlee 2006, Barker 2007, Nolan et al 2008). Pure research tends to be primarily the work of traditional universities that attracts 80% of the funding (Scott & Watson 1994. This suggests that the REF process continues to be self-perpetuating with allocation of funds being given to traditional universities. Although the Cooksey report (2007) highlighted there was a need to translate research into practice that may appear to favour the use of research for occupational practice within new universities, the current peer review exercise still favours existing research networks. This suggests that it is difficult for universities that are new to the REF (as most new universities are) to compete for research funding.

For academics in traditional universities with REF income, the focus of promotion is research outputs with cursory attention given to the standards of teaching (Hannan & Silver 2000). Research in traditional universities is of more importance than teaching as it provides credibility to attract REF funding.

Research in traditional universities provides the credibility to be employed in a research role with a teaching role (Coate et al 2001, Visser-Wijnveen 2009) not to be a credible teacher. The notion research provides credibility for teaching essentially reflects the perspective of those working within research focussed universities. This questions how realistic it is to accept the view of traditional universities where research provides teaching credibility with the focus on research not teaching.

3.6 Building research capability and capacity

The discussion of changing an occupational teaching role to include research invariably has become part of the continuing debate on the drive to achieve occupational status. Thompson (2009) argues that nursing, and nurse educators in particular, have a relatively weak research base. The continued lack of a research profile of occupations has been evaluated in terms of factors that appear to affect research participation. These include; difficulty in obtaining research funds (Mead & Moseley 2000, Deans et al 2003); negative attitudes toward research participation (Hicks 1996, Cooke & Green 2000, Segrott et al 2007); competing administrative, teaching and clinical demands (Roberts 1997, Mead & Moseley 2000); increased student numbers (Mead et al 1997); heavy teaching workloads (Fyffe & Hanley 2002); lack of supportive development strategies (Feldman & Accord 2002) and lack of confidence in research skills (Hicks 1996).

The approach to increase the research capacity and capability in university departments has tended to focus on cultivating a research culture to improve the REF ratings and funding (Traynor & Rafferty 1999, White 2003, Cooke et al 2007). Traynor & Rafferty (1999) describe the choices of approach as 'inclusive' and 'exclusive'. Inclusive approaches provide opportunities for all staff to develop research skills and conduct research. This contrasts with an exclusive approach that places limits on the number of people who can be supported, and

provide different career paths for those who wanted to do research (Melland 1995). Despite the efforts to improve research capacity and capability there has been no significant change in the research profile of occupational groups (Gillespie & Fetridge 2006) or educators (Orme & Powell 2008, Bai et al 2008). The limited impact of the attempts to improve the research role of educators may be in part a result of the one dimensional approaches of developing research skills (Gething & Boonseng 2000) and creating research infrastructures and support mechanisms (Cooke & Green 2000, Jootun and McGhee 2003). There has been little consideration of the impact of the changes to an occupational teaching culture that has not been research focussed.

There are few studies examining the culture of occupational teachers. One study by Clifford (1997) found, in small scale review of nurse educators, which teaching was most frequently cited as a motivation to enter nurse education. This indicated that occupational educators have very different career values that could affect research engagement. Lyons (1999), one of the few pieces of research on social work academics, found that in the mid-1990s, occupational teachers were resistant to become researchers. As Lyons (1999) noted, the lack of research qualifications limited capacity to both undertake research and teach research methods led to a cycle of resistance to research outputs, which was difficult to break. Although Lyons study is more than fifteen years old, Orme & Powell (2008) recently highlighted a continued unwillingness of social work educators to engage with research outputs, which they see as undermining teaching and occupational obligations. Yet how to empower individuals in the process of change that may challenge the beliefs of educator's beliefs and teaching obligations is absent from the literature.

3.6 Summary

The impact of developing a research profile as part of academic role for occupational educators in new universities have been caught up in the

discourse that all teachers should become 'research active'. Increasingly new universities are beginning to emulate the old universities by combining research with teaching to gain a REF profile. As traditional universities tend to be favoured in any research evaluation exercise, it raises questions about new universities attempts to compete in the REF by expecting all teachers to become 'research active'. The change requires a cultural shift to include research in occupational teacher's roles whose focus has been teaching not research. How to empower educators in the process of change, which may challenge their beliefs and teaching obligations, is absent from the literature.

PART TWO

Introduction to the Developments, Findings and Interventions

Part two explores how the departmental project began as a broad commitment to action research and developed into the adoption of a cooperative inquiry. The narrative will be divided into chapters that will detail how the underpinning epistemology, methodology and methods of the cooperative inquiry evolved and were contextualised within the departmental setting. In addition it will show how the findings emerged from the reflective and collaborative work of the inquiry group that informed the development of a departmental applied research strategy.

Capturing the emerging process of action research in a text based report proved challenging. However revealing an iterative process provides a more accurate reflection of the central commitment to the evolutionary nature of cooperative inquiry.

Part two is divided in to 4 chapters:

(1) Chapter 4- Epistemology, Methodology and Methods

This chapter details the choices and dilemmas that characterises the reality of implementing a collaborative approach within a hierarchical organisation. The chapter falls into 3 sub-sections that explore the choice of cooperative inquiry, the contextualisation of the methodology and methods within the department setting.

(2) Chapter 5 – Findings: Introduction

This chapter is an introduction to chapters 6 and 7 that represents the findings of the two simultaneous cycles of cooperative inquiry. In practice the two cycles are not separate but woven together to show how the research emerged from the learning process. However to provide a logical structure, the findings are presented in two chapters.

(3) Chapter 6 – Findings: Second Order Outcomes (Learning-in-Action)

These outcomes' provide an account of the reflective learning (learning-in action) of the inquiry group as they developed the departmental applied research strategy.

(4) Chapter 7 – Findings: First Order Outcomes (Research Outcomes)

These outcomes are the broader research themes. The themes were derived from the analysis of the interview transcript data and used to inform the departmental applied research strategy.

Chapter 4.0 – Epistemology, Methodology and Methods

4.1 Introduction

Chapter 4 details the underpinning epistemology and how the methodology and methods of this inquiry evolved. The study began as a broad commitment to action research, which then developed into the adoption of cooperative inquiry.

Action research is by nature an iterative process and it is this growth that is at the heart of 'good' action research. As Reason & Bradbury (2007) suggests;

> "...*good action research emerges over time in an evolutionary and developmental process, as individuals develop skills of inquiry and as communities of inquiry develop within communities of practice.*" (p2)

The process of developing the methodology and methods for this study was also iterative. As I explored the concept of action research, chose the cooperative inquiry methodology, and contextualised the methods within the departmental setting, my approach evolved over time. Capturing this emerging process in a report proved challenging but provided a more accurate reflection of the central commitment to the evolutionary nature of the study.

I was drawn towards cooperative inquiry under the umbrella of participatory action research (Reason & Bradbury 2002). Cooperative inquiry aims to increase people's involvement in the creation and application of knowledge about themselves and about their worlds (Heron 1996). It would be naïve to assume the journey was neutral, particularly as it was constrained by organisational and political agendas, but it offered a way to address some of the sustained resistance through collaboration and consensus. The narrative became an

exploration of the dilemmas and choices that characterises the reality of cooperative inquiry within the constraints of an organisation.

This chapter will attempt to illustrate this process by capturing the reasoning and dilemmas in choosing and using cooperative inquiry. The chapter naturally fell into three parts:

- **The rationale** - choosing and locating an action research approach;
- **Methodology** - the contextualisation of a cooperative inquiry approach within a university department;
- **Methods** - a cooperative inquiry applied to the department setting.

4.1 The Rationale - Choosing and locating an action research approach

4.1.1 What is action research?

The literature presents a wide variety of definitions but none fully encapsulated how action research is applied in practice. Reason & Bradbury (2007) was finally adopted as it suggested that action research is a;

> *"...family of practices of living inquiry that aims, in a great variety of ways, to link practice and ideas in the service of human flourishing. It is not so much a methodology as an orientation to inquiry that seeks to create participative communities of inquiry in that qualities of curiosity and question posing are brought to bear on significant issues."* (p 1)

This indicates that action research is more of an orientation to research than a discrete methodology. Yet the statement indicates some broad characteristics that describe action research as:

(1) Pragmatic - it is an approach to solving problems that are considered significant by the participants;

(2) Collaborative - it is a collaborative partnership with the central notion that it is an approach to studying issues with those who experience those issues directly. The researcher and participants work together to examine a problem and create action to change it for the better. (Although this raises questions of how much collaboration is possible or necessary);

(3) Context specific – it is generally targeted around the needs of a group to solve pressing issues. (Although the group size is not specified indicating it could vary from a few individuals to a large community);

(4) Focusing on change - it is a transformational endeavour to create change for the better. (Although 'better' implies a value judgement);

(5) Contextual knowledge – it recognises that new knowledge is generated and framed in a particular situation through a collaborative effort by those involved in the inquiry.

Action research is rooted in the social psychology of action emerging from a process of social interaction (Lewin 1946), and 'learning by doing' (Dewey 1973). A core concept of this intellectual and practical engagement is in '*praxis*' (p1, Noffke 1997) that is a theoretical and practical engagement of:

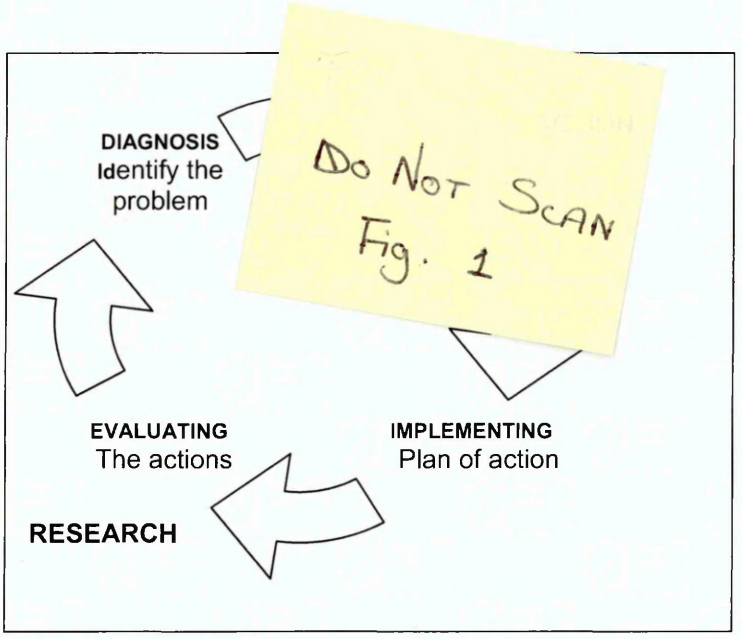
> *"...critical thought and the continuous interplay of doing something and revising our thoughts about what ought to be done."* (p1, Noffke 1995)

Praxis creates a kind of 'cultural interruption' (Grace 1995) causing those involved to reconsider their behaviour, implement actions based on their understanding, and in doing so create a change. Typically this involves creating spaces in which researchers and participants engage together in cycles of action and critical reflection (Reason & McArdle 2008).

The model uses an iterative action research inquiry cycle (Figure 1, p39) which falls broadly into four phases: identifying the problem (diagnosis); exploring how to solve the problems (planning); putting the solutions into action (implementing) and then seeing if the solutions were successful (evaluating). This model is a two-dimensional representation of three-dimensional practice that tends to create an image of reality as events moving on. This does not take account of the unpredictability of organisational reality (Barge & Oliver 2003), limiting possible moments of informal and serendipitous discovery. So the model is only a useful indicator of how things might go in dealing with emergent issues as part of the change process (Coghlan & Brannick 2005).

In choosing an action research approach I was faced with a bewildering array of activities and methods. Action research is a broad concept that has a shared commitment to collaborative change with a variety of philosophical positions; the nature and emphasis of the degree of democratic impulse (participation); the change intervention (action) and how this generates knowledge (Grundy 1982, Holter & Shwartz-Barcott 1993, Hart & Bond 1995).

Figure 1: The action research cycle



Adapted from Baskerville (1999)

4.1.2 Locating an action research methodology

The project aim was to use an action research approach to take account of the views of staff in the development of a research strategy, as a way to engage and empower staff to meet the department research targets. I wondered how realistic the aim was as the impetus for change was generated by the organisation, which could affect the nature and direction of the engagement. In addition, the nature of the organisational structure raised questions about the production of knowledge and how power affects the way in which we understand and interact in the world we inhabit (Coghlan & Brannick 2005). While traditional action research focuses on finding collaborative solutions to problems, the participatory research approach moves the focus towards empowerment (Winter & Munn Giddings 2001, Hope & Waterman 2003, Reason & Bradbury 2007). Thus I became cautiously convinced of the use of a participatory paradigm.

The location of this study within a participatory paradigm (Reason & Bradbury 2007) places emphasis on the collaborative aspects of the method within an "*ecological context*" (p124, Hope & Waterman 2003) so the study has some real world validity. Participatory action research is primarily;

> *"...a self conscious way of empowering people to take effective action towards improving conditions in their lives."* (p 2, Park 1993)

A participatory approach is concerned about how the powerless in marginalised communities are excluded from decision making. The aim is to move people to empowerment by constructing their own knowledge and solutions (Reason & Bradbury 2001).

4.1.3 Participatory action research

The label 'participatory' indicates a commitment to a particular collaborative process and a participatory worldview (Kindon et al 2007). Participatory ontology is to improve the human condition by enabling participants to take actions that improve the quality of their own situation. The approach is seen as adding to the axiological question and is a worthwhile endeavour in terms of "*human flourishing*" (p1, Reason & Bradbury 2001). The participatory approach is conceived as an end in itself as it balances between, and within, an encounter by producing cooperation and autonomy for those involved (Heron & Reason 2007). It raised questions about whether the libratory intent of participatory approaches, associated with empowering marginalised communities, could be transferred to an organisational setting.

4.1.4 Participatory approaches in organisational settings

Wallerstein & Duran (2003) have identified two historic traditions within participatory approaches. A southern tradition, that calls for a sharing of power with the poor and oppressed in decision making. A northern tradition, which uses participation to create system's improvements that, appeared closer (although not an exact match) to the intention of the study. The northern approach is less specifically about change within organisations but focuses on individual empowerment.

Unlike the southern tradition, the northern tradition assumes a soft system's perspective. This generates and works with other's points of view in an organisational and social context to produce an authentic account of the intentions behind the behaviour (Flood 2001). Whitehead, Tasket & Smith (2003) suggest the engagement of all the participants is an indicator of transformative practice, with the libratory intent being met through individual change. How far these individual changes affect a wider organisation is difficult to extrapolate but Cameron (2007) suggested some different organisational participatory approaches.

4.1.5 Organisational participatory action research

Cameron (2007) offers three constructions of participatory action research each with a distinct focus for the organisation:

(1) *On* challenging organisations;
(2) To be conducted *for* organisations;
(3) Conducted *with* organisations.

4.1.5.1. *On* challenging organisations

Using an '*on*' challenging organisations approach, the organisation is seen as the cause of oppression and exploitation and researcher works with the participants to devise ways to confront the organisation. The emphasis is on transforming the participants' day-to-day lives and encouraging collective action. The challenge for a researcher is the extent to which they can steer the project through political agendas.

4.1.5.2 To be conducted *for* organisations

Cameron (2007) argues conducting research *'for'* organisations may generate transformations by researchers working to produce recommendations for an organisation to act upon. However for this approach to be successful the organisation needs to recognise that a participatory approach is a legitimate way to facilitate change. How far this approach could elicit real participation is debatable since the context for the research is largely controlled by the organisation. In addition, researchers may face particular challenges in ensuring the organisation acts on the findings of the project. Cameron (2007) suggests if these issues are addressed, the approach could generate transformations which are in line with the original libratory intent of participatory action research.

4.1.5.3 Conducted *with* organisations

In research conducted *'with'* organisations, the members of that organisation actively participate as co-researchers with other participant groups outside of the organisation. This approach provides an opportunity to bring together people from a variety of backgrounds, experiences and social networks. As Cameron (2007) notes, the challenge of this approach is that researchers have

to negotiate organisational cultures as outsiders, which may influence the results of the project.

4.1.5.4 Choosing a construction

On reviewing these approaches for this project the first construction, *'on'* challenging organisations, was dismissed as confrontational. The approach implies the organisation is the cause of oppression and exploitation and researchers work with participants to devise ways to confront the sources of exploitation. This could increase the existing tensions between management and staff creating further resistance.

Working *'with'* organisations appeared to be a useful framework that could draw on other co-researchers not part of the department. This had the potential to ameliorate the potential vulnerabilities for participants created by my researcher and departmental role. However I had already encountered a degree of suspicion and resistance as I took up the role as head of department (as an outsider) so any external involvement could be construed as having a university agenda. The third construction was dismissed.

Working *'for'* an organisation seemed less overly political and appeared to be the most useful construction for the project. This is not to gloss over the difficulties of empowerment within a hierarchical environment, but involving staff as co-inquirers to produce recommendations for the organisation, offered a way to create participatory process. However using this approach may be problematic if participants have other priorities and distrust the intentions of the study, resulting in the engagement being more symbolic than substantive. Convincing the wider organisation to accept the recommendations (especially if the outcomes didn't specifically address the research targets) could also be challenging.

4.1.6 Participative paradigm knowing

By choosing the working *'for'* an organisation construction, within a participative paradigm, I had committed the inquiry to a particular way of knowing. The nature of knowledge within a participatory paradigm, accepts reality does not exist outside the understanding of those who create and hold those notions (Guba and Lincoln 1989). Constructions are not more or less 'true', but rather more or less sophisticated and informed (Heron & Reason 1997). The approach grounds this knowledge in experiential knowing. Knowing is in the process of a transaction through a subjective-objective encounter. As Reason & Heron (1997) stated;

> *"To experience anything is to participate in it, and to participate is to both mould and to encounter, hence experiential reality is always subjective-objective."* (p277).

It follows then that, what can be known is always as a subjectively articulated world, whose objectivity is relative to how it is shaped by the knower. Subjective epistemology recognises that there is no objective or single external reality as the researcher is part of the research process not separate from it (Heron & Reason 2002, Kindon et al 2007). The process is value laden but the epistemic reflective process aims to expose the interests of all of the participants to enable emancipation through self reflection (Winter & Munn Giddings 2001, Coghlan & Brannick 2005). Subjective multiple realities are assumed (Hope & Waterman 2002) so what is known can never be final since our understanding is always emerging through a participative relationship. The validity of the understanding is always through the transparent articulation of an emerging consensus of understanding. Encounters are given meaning through personal perspectives and are understood and agreed in the context of a participatory consensus. As Abram (1996) indicates:

"...underneath our literate abstractions, a deeply participatory relation to things and to the earth, a felt reciprocity..." (p 124)

'Reciprocity' in this context is achieved through a shared understanding of culture, language, values, norms and beliefs (Maiter et al 2008).

The validity of consensus in a participatory paradigm is a function of the balance between action and reflection within a cycle. Extended action with little reflection is unlikely to yield much valuable *"truth – value"* (p 129, Boud, Keogh & Walker 1985). Validity is enhanced through the *"dialectical movement between action and reflection"* (p 125, Hope & Waterman 2002). Guba & Lincoln (1994) developed the concept of authenticity for qualitative research, which has relevance here. The ethical framework suggests research should examine the degree participants were involved (*fairness*) in the research and the evidence of the outcomes stimulated and empowered participants to act and reshape their culture (*catalytic authenticity*). It is the expanded awareness (*reflexivity*) that provides the criteria to judge the research. Validity is enhanced when there are opportunities for emergent issues and refinement of ideas. Lather (1986) calls this a kind of 'pruning'.

The process of refinement can create tensions and contradictions in the inquiry process. Waterman (1998) suggests that explicit discussions of the tensions and refinement are important validating principles, which show a *"critical subjectivity"* (p128, Heron 1996). Where the inquirers fail to challenge and validate their reflections with experience, they can engage in tacit collusion. This could result in a particular perspective dominating the discussions. The inquiry has to foster an attitude of constructive critical challenge either by the co-inquirers or through the use of external members providing challenge.

4.1.7 Choosing cooperative inquiry

Empowerment in a participatory paradigm still raises questions around who designs the research, interprets the data and assesses the validity of the findings. Brechin (1993) illustrated this when he noted:

> *"...Research tends to be owned and controlled by researchers, or by those who, in turn, own and control the researchers. Those who remain powerless to influence the processes of information gathering, the identification of truth, and the dissemination of findings are usually the subjects of the research, those very people whose interests the research may purport to serve."* (p73)

Participative action research has a commitment to collaboration but this commitment does not often extend to the research methods. It is just a democratisation of participant involvement in the data collection and sometimes the analysis (Heron 1996). Whereas cooperative inquiry (sometimes referred to as collaborative inquiry), within a participative action research approach, attempts to further reduce the distinction between the researcher and participants. This is by creating a democratic process for both the content and design of the methods.

Cooperative inquiry, as a form of person-centered participative inquiry, breaks down the separation of the roles between researchers and the subjects (Heron 1996, Reason & Heron 1999). The relationship is replaced by a participative relationship through the whole of the research process. However it is unrealistic to assume that this participation is a single activity. Participation can be affected by the goals of the study that may be contested. The interactions between the diversity of individual and group interests and priorities can also affect the group cohesion and participation (Kindon et al 2007). The notion of participation within this study was challenging since my role as the head of a department could detract from a role as a co-researcher and co-subject. Although there is participatory intent, it is essential to consider the realities of the politics and

participation within the group and external stakeholders (Greenwood et al 1993).

The nature of the relationship of the participant as a co-inquirer means that through the design, data collection and analysis, the process takes on the meaning bestowed upon it by those researchers. As Baldwin (2002) noted; for change in behaviour to occur, it is important that what is to be changed, and what the change is to consist of, has some meaning within the experience of those who are expecting to change. Cooperative inquiry starts with this participative premise (Heron 1996; Heron and Reason 2001 & 2007), and is a method likely to facilitate change (Greenwood 2007).

4.1.8 Summary

Action research within a participatory paradigm was chosen for its commitment to an interactive working '*with*' participants. Participative ontology indicates a commitment to a collaborative process that empowers participants by enabling them to construct their own knowledge and solutions. The participative paradigm is normally used for marginalised communities. However the use of Cameron's (200&) construction '*working for*' organisations was proposed as it offered a way to use it within the department and retain the libratory intent of the paradigm. Cooperative inquiry was chosen as it further reduced the distinction between the facilitator and participants in both the design and implementation of the project, creating ownership in the process of change.

4.2 Methodology- the Contextualisation of a Cooperative Enquiry Approach within a University Department

4.2.1 Introduction

This section explores the characteristics of cooperative inquiry and the challenges of creating authentic participation within an organisational setting. The nature of cooperative inquiry means the method and outcomes are only tentative at this stage. The final project design would be decided in consensus with the co-inquiry group.

The project was formulated around my desire to initiate a participative inquiry process, which would have an impact on the research engagement and culture within a university nursing department. The aim was to invite a small group of co-inquires (drawn from self-selected volunteers from each of the department teaching teams), to collate and analyse data from the wider departmental staff. This data would be used to inform the development of a departmental applied research strategy. The project was not simply to construct a strategy but to use the collaborative dialogue of the inquiry process (between co-inquires and departmental staff) to create a strategy that the staff would own, which would facilitate engagement with research and ultimately create a cultural transformation.

There are different forms of cooperative inquiry groups that can be a convened. One way is by an "*initiator researcher*" (p64, Heron 1996). The initiator co-opts others interested in the topic to join the group (Heron 1996). This resonated with this study. For me to convene an inquiry group as the initiator, to explore the issues using a collaborative process, was the most likely way that a participative inquiry could be used within a large department. Using a collaborative inquiry as a new manager and change agent could be considered subversive and threatening to the existing organisational norms of control in a hierarchical

structure (Coghlan & Brannick 2005). Cooklin (1999) referred to change agents as *'irreverent inmates'* (p18, Cooklin 1999). My role in developing an inquiry could be seen to undermine the roles, rules and rituals and questioning some strongly held beliefs about the nature of relationships and behaviours. Cooklin (1999) suggested a way to create change and reduce the resistance was for the change agent to use a reference group who can also be used to challenge the organisation. In some respects the reference group was the co-inquiry group. By using a group of co-inquires from the departmental staff I anticipated that the wider department would view the approach as less threatening since the inquiry group were colleagues. Using a co-inquiry group could also ameliorate the barriers created by my management role that could affect the validity of the project.

4.2.2 Characteristics of cooperative inquiry

The nature of cooperative inquiry is to acquire knowledge through action and joint reflection. The approach can be *"informative"'* or "*transformative*" (p48-49 Heron 1996). The primary outcome of an informative inquiry is to describe and explain some domain of experience. A secondary outcome is the development of practical skills for all of the co-inquirers through generating and analysing data. Whereas, transformative inquiry seeks to explore practice within a domain and change it. The primary outcome is the practical skills and changes in a situation with the secondary outcome being the propositions, which report and evaluate the practices and changes.

This study would be essentially drawn from a transformative domain. The transformative element is both in the process of skills development of the inquiry group and the potential for a wider departmental change. The co-inquirers would develop skills by collating data and through consensus, develop an understanding of the reasons that staff were not engaging with research. This understanding would inform the creation of a departmental applied

research strategy. The co-inquirers will not be isolated but interdependent (Heron 1996) within the culture of the department and so transform the culture through the interactions with their colleagues. Shaw (2002) describes how conversations within organisations enable individuals to make sense of the culture through "*a knowingful doing*" (p96) that becomes part of the social identity that creates change.

Cooperative inquiry involves and makes explicit two complementary types of participation; relations between people and the decisions that affect them (*political*); and knowing the relationship between the knower and what is known (*epistemic*). Epistemic participation means that any propositional knowledge (that is the outcome of the research) is grounded by the researchers in their own experiential knowledge. It follows then that the researchers are also the subjects and the subjects are also the researchers (Heron 1996, Heron & Reason 2001 & 2007).

Using Heron's analysis, it appears that it may be possible to achieve full political and epistemic participation within a co-inquiry group (Table 1, p 51). However participation is affected by the insider affiliations within the departmental hierarchical structure. I would need to ensure that care was taken to ensure the internal politics did not weaken claims of full participation within the co-inquiry group. However participation by the wider departmental staff would be partial. The departmental staff would be involved in providing data and validating our findings but would not be fully involved as co-inquirers in decisions regarding the research design.

Table 1: Participation of the co- inquiry group

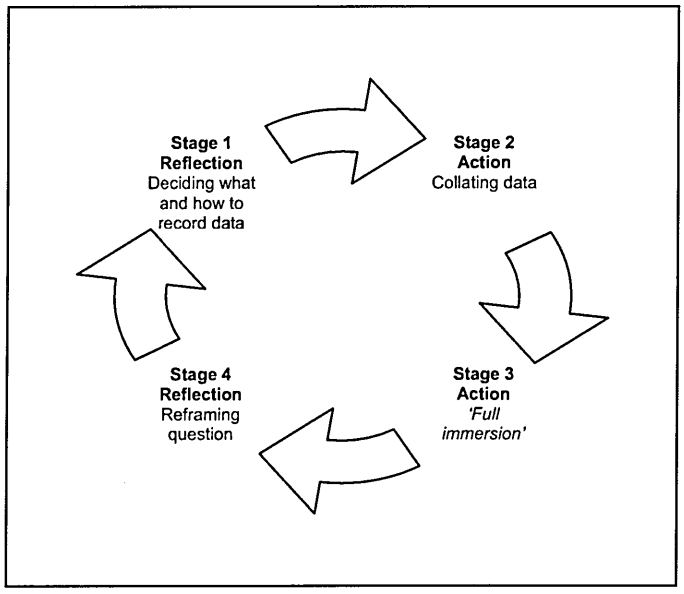
	Researcher	Subject
Political participation – involvement in research thinking and decision making	***Full***	***Full***
Epistemic participation – involvement in experience and action being researched	***Full***	***Full***

After Heron (1996)

4.2.3 The cooperative inquiry cycle

Heron (1996) represents the methodological process of cooperative cycling through the phases of action and reflection as four stages (Figure 2).

Figure 2: The 4 stages of the cooperative cycle (After Heron 1996)



Heron (P54, 1996) describes the four stages as;

Stage 1: a group of co researchers meet to explore an agreed area of activity. They agree the research focus, develop research questions or propositions and undertake some action that will contribute to the exploration and decide upon a method of recording (*reflection*).

Stage 2: the co-researchers become co-subjects carrying out the agreed actions, observing and recording the process and outcomes of their own, and others experiences. This is a time to notice subtle differences in experiences and to 'hold lightly' to the conceptual frame where they started (*action*).

Stage 3**:** this is the touchstone of the inquiry method as the co-subjects become fully immersed and engaged with their experiences that may enable a break-through in new awareness and creative insights (*action*).

Stage 4*:* after an agreed period in stage 2 & 3 the co-researchers meet again to reconsider their original questions in the light of their experiences. This may lead to reframing, rejecting or posing new questions in the light of experience (*reflection*).

Where co-inquirers meet within the cycle is not specified but is likely in the reflective phases (stage 1) and again at the reframing stage (stage 4). Heron (1996) noted the framework he outlined was "*only a way*" (p49, Heron 1996) to do cooperative inquiry and is not a prescriptive template. What is important is that the research outcomes are well-grounded in the topic of inquiry. It is the two-way impact of refection and action that deepens, clarifies and extends the focus of the inquiry. Stage 3 (action) "*full immersion*" (p49, Heron 1996), although providing opportunities of great openness, suggested co-inquirers could also *"lose their way"* (p 49, Heron 1996). An additional meeting in stage 3 could offer support for inexperienced researchers, adding collective reflections

and awareness of the burgeoning exploration (Heron 1996, Heron & Reason 2007).

The iterative process of cooperative inquiry cycling can be repeated several times as ideas and discoveries in the early stages are only tentative and they need to be checked and related to other phases of exploration. The experiential learning can be divergent (each exploring a different aspect of the inquiry) or convergent (focusing on the same aspect) (Heron 1996, Reason 1999, Heron & Reason 2007). The project learning is likely to be convergent as the focus will be on the development of the research strategy.

The cycle can be situated within two complementary and interdependent inquiry cultures; *"Apollonian"* or *"Dionysian"* (p45-47, Heron 1996). Apollonian inquiry has an explicit sequence of planning, acting, observations and reflections and then re-planning. A Dionysian inquiry, in contrast, is an ad hoc tacit interplay between action and reflection that allows the learning to emerge creatively. Although in practice a study can have elements of both, the deliverables and tight deadlines of the departmental targets suggested a strong Apollonian element for this project.

4.2.4 Cooperative inquiry epistemology

The epistemological grounding of cooperative inquiry is a form of experiential and practical knowing. This knowing goes beyond what Ryle (1949) classically described as `knowing that' and `knowing how' to include 'knowing why', which attempts to explain behaviour within a social situation. Knowledge in this sense is not a thing to be discovered but arises in the process of living, which is in the voices of ordinary people. It is the interaction within a cooperative inquiry through the use of interpersonal skills that creates knowledge. Heron and Reason (p84, 2001) describe a range of skills to facilitate this knowing as:

- Being present and open; empathy with the group;
- Radical practice and congruence; being aware of values and motives; the lack of congruence and making adjustments;
- Non-attachment and meta-intentionality; not investing our own identity and emotional security in the action;
- Emotional competence; identifying and managing emotional stress.

These interpersonal skills are similar to skills developed within healthcare for client engagement. The academic qualifications of the staff in the department (all having a first degree and most holding a masters level and occupational healthcare qualifications) would also suggest that they would have the academic and interpersonal skills development necessary for this type of research approach. This made a cooperative study both attractive and feasible. Yet having the skills does not forestall the potential emotionality of the process of interpersonal engagement. The inquiry still needed to address the impact of the project on the interactions within the group and potential reactions of departmental staff, which could affect the quality of the 'knowing' generated.

The cooperative inquiry is developed through four ways of knowing (Heron & Reason 1997). Heron (1996) describes this as "*extended epistemology*" (p52); experiential, presentational, propositional and practical knowledge:

- *Experiential knowledge*; is gained by a direct encounter through a tacit intuition, empathy and feeling;
- *Presentational knowledge;* gives expression to experience through stories, drawings, music etc;
- *Propositional knowledge;* is knowledge about something in the form of a logically organised idea or theory;
- *Practical knowledge;* it is the knowing how to do something that is evident in a skill. (p 52-54, Heron 1996)

Knowing develops within the research cycle when co-researchers collaborate to: define the questions they wish to explore; decide the methodology for that exploration (*propositional knowing*); together or separately they apply this methodology in the world of their practice (*practical knowing*); that leads to new forms of encounter with their world (*experiential knowing*); and they find ways to represent this experience in significant patterns (*presentational knowing*); that feeds into a revised propositional understanding of the originating questions. This cycle aims to refine and deepen the complementary way the inquiry group enrich their congruence. Heron (1996) articulates this as being conscious of actions in the midst of that action.

The research cycling between action and reflection leads toward critical subjectivity that is a primary way of enhancing the validity of inquirers' subjective-objective reality (Heron 1996). Critical subjectivity requires attention both to the forms of knowing and their "*consummating relations"* (p28, Heron & Reason 1997). 'Consummating relations' is the celebration of the values of our individual being through reflection, which affects our understanding. Heron & Reason (1997) suggest is when;

> *"...we do not suppress our primary subjective experience but accept that it is our experiential articulation of being in a world, and as such is the ground of all our knowing."* (p7)

Validity is achieved through a balance between action and reflection that is described by Heron (1996) as the dynamic interplay of chaos and order. The concept of chaos is understood as multiple realities, which may be contradictory. Whereas the concept of order is where there is agreement in a consensus view of reality. The consensus tries to make sense through the cyclical motion between action and research. The process needs to address any uncritical subjectivity, projections and displaced anxiety, and challenges that can emerge in the relatively uncontrolled developments so the outcome is an authentic collaboration and consensus.

Where the co-inquirers fail to challenge and validate their reflections with experience the result can be tacit collusion that creates a *"pseudo-reality"* (p146, Heron 1996). Heron (1996) describes the use of a devil's advocate within a group to challenge the views presented to reduce the risk of tacit collusion. This doesn't have to be one person's role, but the co-inquirers developing an attitude of constructive critical challenge.

4.2.5 The project objective

The project objective was to use cooperative inquiry to construct a departmental applied research strategy as a vehicle for cultural change. The process of constructing the research strategy would begin a collaborative dialogue through the formal and informal interactions of co-inquirers with the departmental staff. It was anticipated that the collaborative development of a strategy would facilitate staff ownership of the strategy and so improve engagement with research. The project aimed to explore the research academic role for occupational teachers by collecting and analysing data from the: inquiry group reflections; focus group discussions; research interviews and the feedback from the departmental meetings.

4.2.6 The co-inquiry group

My intention was to invite volunteers from the department to join a Collaborative Enquiry Group (CEG). Not using cooperative or inquiry in the group title was driven by my initial desire to downplay the formality of the research, which may serve as a barrier to collaboration. The word 'collaborative' defined as work jointly (Oxford English Dictionary 1998), seemed more participative than using cooperative (defined as help or assist (Oxford English Dictionary 1998). Cooperative appears to imply a hierarchical relationship of doing something 'with' rather than together. Also, 'enquiry' suggested an informal questioning

(Oxford English Dictionary 1998) rather than the more formal inquiry process. As the project progressed I was conscious of the need to ensure informed consent and recognised the inconsistency between downplaying the research and the need for transparency. As I started with the name CEG I continued to it throughout the project in reference to the co-inquiry group. However the study report will still retain the term 'inquiry' to avoid the confusion of using 'inquiry' and 'enquiry' interchangeably throughout the discussion.

The CEG would be drawn from all of the department teaching teams. The department organisational structure has teaching teams linked to an occupational focus (adult nursing, child nursing, midwifery, paramedics, health studies and operating department practitioners (ODP). I planned to use the teaching teams to invite involvement in the CEG with the underlying principle of voluntary and informed self-selection. All staff except the line managers are part of a teaching team, so I included the managers as a separate group.

How many to include in the inquiry group was influenced by the research on small group configuration. Parker (2003) suggested that the size of groups vary with the specific goal and the degree team effectiveness where all members participate. Parker's work, which draws mainly from evidence to support teaching environments, had some relevance for this project, suggested group sizes of less than eight encouraged more shared ownership. Lowry et al (2005) also measured the effects of group size on communication and found that smaller groups (between three and six) maintained higher levels of communication quality. I calculated that the inquiry would need the minimum of six members to ensure all teaching teams were represented. This would still be small enough to still facilitate effective small group communication. If the project attracted larger numbers it would require more than one inquiry group to facilitate participation.

4.2.7 Validity in cooperative inquiry

Consensus is the strength of cooperative inquiry but there was a need to ensure the articulation of the subjective-objective reality was valid. There was a possibility of collusion within the department inquiry group as we could all filter the analysis through our own world views. The consensus could then become a reflection of our preconceived ideas. Heron describes the concepts of 'open boundary' and 'bracketing' feedback' (Heron 1996) as helpful constructions to reduce collusion.

The validity of the inquiry subjective-objective consensus may be strengthened through participation in an "*open boundary feedback*" (p131, Boud, Keogh & Walker 1985). An 'open boundary' provides wider participation by gaining feedback from those who are not part of an inquiry group (Heron 1996). Data would be collated from the wider department staff but an 'open boundary' could provide opportunities for a wider engagement to confirm or challenge any consensus outcomes of the inquiry group without infringing the norm of a cooperative inquiry process. This would be through the department meetings.

'Bracketing' (Heron 1996) is holding in abeyance our own constructs of reality suggests a type of outsider role for the inquiry group. Although we needed to be aware of our own worldviews, how realistic or possible bracketing could be within the departmental project was debateable since all co-inquires will be insiders.

4.2.8 Insider relationships

Co-inquires as colleagues and insiders assume a level of relationship and knowledge as insiders. Merton (1972) noted that the idea of a researcher having a role as an absolute insider was based upon "d*eceptively simple notions of identity and status*" (p 22, 1972). Insider research assumes homogeneity and stability of identity within groups that can be a misleading construct. Hodkinson (2005) challenged the notion identity being fixed according to status. In an examination of youth culture, Hodkinson (2005) found

that particular elements of identity can fluctuate back and forth in interactions according to the context and audience. The findings are not fully transferable to this inquiry, since youth identity is still developing, but it raises questions about the stability of insider collegiate identities.

The concept of an insider role in the literature appears to be one dimensional and does not account for the network of affiliations that can affect the nature of the encounter. These include: the perceived trustworthiness and rapport in relationships; the degree of empowerment (Harrison et al 2001, Corbin & Morse 2003); the type of problem; the learning process and the extent to that it challenges existing power relations (Hart & Bond 2000);. There is already a degree of *'being* known' (Lather 1991) and ways of knowing are "*inherently culture bound and how the researcher permeates the inquiry*" (p91, Lather). The impact of the researcher on the insider relationship is unknowable but where there are hierarchical relationships Collins (1990) proposed a construct of "*outsider-within*" (p232). This simplistic duality presupposes encounters that put the researcher in a 'them or us' context. Yet the nature of the encounter and the proximity of the researcher distance (as an insider or outsider) can create a sense of vulnerability that is not so easy to predict.

Cooperative inquiry assumes an equality of participation for co-inquirers'. Whether this is realistic for this project is debateable given my manager role in the department. Although I intend to utilise methods that ameliorate the potential hierarchy with the inquiry group, Oates (2002) noted that even with the democratic intent of cooperative inquiries there is not always equality. Each participant brings different skills and experiences to the study that can affect collaboration. This suggests that in the work to facilitate collaboration it may not be possible to create equality. The intent may be more of a willingness to create a collaborative consensus than equality.

The effect of the actual roles as co-inquirers within the department also suggests a potential barrier to collaborative inquiry. Cooperative studies tend to

focus on peers with the same social status as a means of professional development (Baldwin 2002) but I was proposing to use co-inquirers to create a change for the department. There are examples of mixed groups with a "*counterpartal role*" (p 182, Heron & Reason 2001) where the inquiry group includes different social roles with implicit power aspects to overcome. Examples include: the client-practitioner role (Canter 1998, Lloyd & Carson 2005, Tee et al 2007) and the student-teacher relationship (Mills 2002, Bellefeuille & Hemingway 2006). The inquiry group will have a 'counterpartal' role (as I am a manager within the group) that could affect the collaborative relationship as equal contributors of the inquiry.

4.2.9 Data collection

4.2.9.1 Introduction

This section explores the proposed methods to collect data to inform the applied research strategy using focus groups of the departmental teaching teams, interviews, reflective diaries and co-inquiry group meetings.

4.2.9.2 Data collection – Team meetings as focus groups

One way could be to use co-inquires, as members of the teaching teams, to collate data collated from the course teaching team meetings they were members of. This had the benefit of using colleagues to collate information and reduce the barriers that my departmental role could create. Using course teaching teams was a pragmatic solution to data collection as each team met monthly to discuss course quality issues. Turning a teaching team meeting into a focus group means a change of function for the team meeting and this raised practical and ethical complications that will need to be resolved to avoid blurring the lines between the project and the work of the department.

Krueger & Casey (2008) provided characteristics that could be used to identify a focus group as a group of people that: possess certain characteristics; produce qualitative data; have a focused discussion; and help to understand a topic of interest. It is the production of qualitative data that distinguished the teaching team as a focus group and, by using the team meeting to collect data, potentially blurred the boundaries between departmental and project work. Staff would need to be conscious where the team meeting ended and inquiry began to provide explicit written consent for participation in the project element. In addition the use of informal conversations as data would need explicit consent to be included in the project. The use of informal data also created some ethical tensions. Co-inquirers were both researchers and part of a network of department and university affiliations and so could be privy to both formal meetings and informal collegiate conversations. To avoid conflicts of interest and breaches in ethical standards, only narratives that had consent could be used as data. This means there was a potential loss of information, but it would limit the temptation to view department staff as objects rather than partners in the study.

4.2.9.3 Data collection – interviews

My intention was to collect additional data through interviews to supplement the data from the focus groups. I anticipated that it would be ideal to interview at least one person from each team. This could provide differing perspectives from the occupational groups who have varying experience within a higher education setting.

I was initially drawn to use unstructured interviews as a way of providing deeper and more multifaceted insights (Corbin & Morse 2003). Using this approach asks participants to tell their story with the researcher taking a passive listening role (Spradley 1979), except perhaps in probing for clarification (Fontana & Frey 1998). This appeared to create a researcher-researched relationship and was

abandoned as it lacked the egalitarian participative relationship of cooperative inquiry.

The choice of interactive interviews arose out of the need to create a sense of *'reciprocity'* that Kottack (1986) describes as an *'exchange between social equals'* (p136). This personalised form of exchange has an expectation of return that takes place between people who have a social bond, which is strengthened by the exchange. It reinforces a participatory approach although it still carries some moral weight. Inherent in the process is psychological power over the recipient until the obligation to reciprocate is eventually met (Klienman 1995). Harrison et al (2001) advocated a psychological access to reciprocity that could be achieved through the judicious use of self disclosure to turn the interview into a conversation. Maither et al (2008) suggested that by creating a *'reciprocal dialogue'* (p307) enables participants to be empowered as equal contributors within a research study. Thus a tentative sharing of my own views (not just a management perspective), could address some of the difficulties of the process by providing a permissive environment for participants to reveal their own perspectives and creating a *'reciprocal dialogue'*.

I was unclear who should collect the interview data. There was the possibility that if I interviewed staff it could create a boss-subordinate encounter due to my departmental role (Corbin & Morse 2003). Although it is claimed that the power influences of hierarchical relationships can be minimised by being unobtrusive (Thompson 1995), this objective stance didn't sit comfortably with an empowering approach. Using an interactive *'reciprocal dialogue'* interview offered a way to create a sense of equality in the interview process where I felt I could participate in collating data as a co-inquirer.

The process of the interviewing itself promotes a reflective approach consistent with the cooperative cycle. This shares characteristics with counselling although they were not intended to be counselling sessions (Harrison et al 2001). Honeycutt (1994) identified the process of interviewing as therapeutic with

beneficial outcomes irrespective of the content of the interview that served as a way to; promote self acknowledgement and validation; provide a contribution to a sense of purpose; to increase self awareness; to grant a sense of empowerment; and to give a voice to the voiceless and disenfranchised. Klietman (1995) is bold enough to suggest this is a healing process in cultures that have felt disempowered. This is rather a grand claim and there is no intention that the interviews in this project will be used for therapy. However the cathartic nature of telling a story from those who feel disempowered does suggest there is a possibility of unintended but beneficial outcomes. I recognised that outcomes may not always be positive and where some may feel uncomfortable, or want to discuss issues further after the encounter, support could be offered. A member of the psychology department offered confidential support.

4.2.9.4 Data collection – reflective diaries

The reflection and personal insights critical in the action research cycle (Kelly & Simpson 2001) are a key part of the reflective learning process of cooperative inquiry by creating transparency through knowing and exposing the self (MacNaughton 2001). They could be documented through a personal journal. Reflective practice in this context aims to make visible to the reader the constructed nature and chronology of the choices leading to the research outcomes (Ortlipp 2008).

A journal can provide notes of what was done (actions), and what was learned (reflection), to make sense of the process and begin to make explicit presuppositions; underlying assumptions (Ortlipp 2008) and choices; through self-awareness and self-understanding (Mruck & Breuer 2003, Herr & Anderson 2005). A journal could also provide contextual data that could supplement the documentation of the inquiry group meetings.

As Boden et al (2005) pointed out, keeping and using a reflective research journal can make the messiness of the research process visible. It was an important consideration in helping to expose the thinking and values behind any decisions or responses to an inquiry. A journal could provide a kind of 'self differentiation' (McNiff 1996) to make personal reflections and learning transparent. I intended to keep a journal and I would invite co-inquirers to keep a journal. However I felt the invitation could only be on a voluntary basis as members may feel this additional task could be burdensome.

I intended to make entries after critical incidents such as the inquiry group meetings. McNiff & Whitehead (2002) suggested reflective diaries not only shows the development in action (noting any shifts in emphasis) but is also a valuable source of data. Using the diary in this way raised concerns about how I should share personal entries. McNiff et al (1996) suggested that journal reflections often contain emotional response to changes and it may not be prudent to share all the raw data. This was pertinent since I would have a number of roles including manager, co-inquirer, researcher and doctorate student. Not all the reflections would be relevant to the inquiry and a journal could have entries that are sensitive personally and for the inquiry group. I explored the possibility of a 'critical friend' to share my reflections, to help evaluate what would be appropriate to share and also explore my developing self awareness.

The concept of 'critical friend' is well documented in the action research literature (McNiff & Whitehead 2002, Coghlan & Brannick 2005), but not a feature of the cooperative inquiry discussions (Heron 1996, Heron & Reason 2001). Critical friends have been utilised in action research as a confidante (Lomax et al 1996), and a source of validation external to the inquiry (McNiff et al 1996, Laughlin 2009). There is some tension in the use of critical friends as external validation as they have been criticised as a source of collusion (McNiff et al 1996). In part, this is because critical friends are often chosen for their similar values and understanding of the research issues. So rather than use the

process for validation, I explored the role of 'confidante' as a personal guide providing a safe space to discuss my inquiry journey. My work-based supervisor and another departmental head agreed to provide this role and meet with me bi-monthly. The conversations would be 'critical conversations' (McNiff & Whitehead 2002) that could help me shift and define my research direction.

4.2.9.5 Data collection - Meeting notes

The meeting notes and documents of the CEG could provide an invaluable source of data to illustrate the timeline and development of the inquiry group discussions. I decided not to digitally record the first meeting but ask a member of the group to take brief written notes, which could be written up more fully after the meeting. I felt that taking a digital recorder to a meeting could create an idea that I was in charge of collecting the study data rather than being part of the group as a co-inquirer. While this approach could result in the loss of some data (although the written notes would provide a record of the meeting) it could also create a barrier between the co-inquirers limiting the level of overall participation. I decided not to use a digital recorder for the first meeting but, as a co-inquirer, I would need to consult with the inquiry group regarding their preferences for recording future meetings.

4.2.9.6 Data collection- detailed research notes

As a way to try and tease out the codes, which were emerging during the inquiry group meetings, my intention was that the group would make more detailed notes on the research themes. Initially I decided to note down the themes and then link the quotes to that theme. This would be used by the inquiry group to gain a consensus on the emerging codes, which could inform the research strategy development.

4.2.10 Ethical considerations

4.2.10.1 Introduction

Research ethics relies on considerations of doing no harm, confidentiality, informed consent, honesty and the right to withdraw (Coghlan & Brannick 2001, Winter & Munn-Giddings 2001). However the nature of the project's participative approach and my insider role meant that equality and confidentiality created some tensions that became uniquely challenging to resolve.

Williamson & Prosser (2002) argue that in action research the close relationship between researcher and participants along with the explicit aim of changing practice make the ethical aspects unique. They suggest that there are three questions that the researchers need to address that provide a useful framework to explore some of the issues. I have summarised the questions and will use them to structure this section. The three questions are:

- How can confidentiality and anonymity be guaranteed?
- How can informed consent be meaningful?
- How can the researcher avoid doing harm to the participants?

(P 589-560, after Williamson & Prosser 2002)

4.2.10.2 How can confidentiality and anonymity be guaranteed?

Insider research brings to the foreground the problem of personal and institutional anonymity. An assurance at the start of the project could be given to ensure anonymity through removing or changing unique details, which could identity individuals, to protect and maintain the integrity of disclosures. Protecting all those involved in organisational research may appear to be a matter of sensitivity and mutual agreement about how details are presented in a

report, but this doesn't address the boundaries between colleague and researchers. Agreeing confidentiality in the research project may have limited value as the individuals will know each other within an organisation. The sharing of stories, even information with personal information obscured, is difficult to ensure complete confidentiality within a workplace organisation (Titchen & Binnie 1992). Meyer (2001) noted that it is possible to assure individuals about not being named and that any disclosures will be anonymous in a report, but it is difficult to control what participants say to one another. This illustrates the problems of maintaining anonymity when sharing multiple roles within an organisation. Tee et al (2007) argue that complete anonymity is sometimes inappropriate particularly when sharing as part of the learning process within an organisation. It may not be possible to achieve complete anonymity through the project, but the question of doing no harm is still important. To resolve the ethical tension of insider research I intend to ensure that co-inquires agree ground rules about what and how information should be shared.

The problem of institutional anonymity is also a concern. Details of the organisation may be altered in small ways to obscure the organisation without affecting the research, but citing and referencing information from reports where the institution is usually named in the title, is part of the research transparency. Although I could use the co-inquirers to help assess the 'traceability' of the report, it is unlikely that we could eliminate all evidence and a reader could identify the institution, should they wish to. Trowler (2011) suggests that complete anonymity of the organisation should not be fully guaranteed. This is a concern since the doctorate report will be in the public domain and the organisation would want to ensure that they are presented positively. This creates an ethical tension between transparency and presenting details that could harm to the reputation of the organisation or individuals within the organisation.

Good practice would be to obscure details that do not affect the research narrative, as much as is possible, and ensuring department staff have access to

the report to assess whether their identity and role(s) are sufficiently obscured. Contributions of staff will be part of the inquiry process but there must be an agreement that any sharing is not utilised in ways that may be harmful to the individual or the organisation.

4.2.10.3 How can informed consent be meaningful?

Multiple roles and the emerging nature of any action research can affect consent with regard to whom and to what consent is given. The question of 'who' is relevant for all insider research (Meyerson 2001). For action research the 'who' implies a political dimension of change associated with a occupational identity or personal interest, rather than the neutrality in other qualitative paradigms (Williams 1995). It was planned that written consent would be obtained from all participants of the members of the inquiry group and from individuals involved in interviews. Written consent would also be obtained from the members of the teaching teams involved in focus groups. The issue of how and who asks for the consent could be politically sensitive.

As the head of a department approaching staff directly for consent could create feelings of vulnerability. The staff may see my request in the context of the hierarchy and role within the department and feel unable to refuse. The effects of my role on requesting consent could be ameliorated through the use of an indirect route such sending as out and receiving back details and consent forms via the administration staff or other members of the inquiry group.

The issue of 'what' individuals are consenting to in cooperative inquiry is complex. Providing consent through a signed document suggests that this is not just a single event but as part of an ongoing process, which is a feature of any naturalistic study. However the evolving tensions created by the nature of cooperative inquiry may make it difficult for participants to know what they are consenting to (Titchen 1995) and how to cope with the challenges and negative

effects of its reformist nature. Respect for persons provides an opportunity for participants to decline involvement and allowing individuals to withdraw may be a simple acceptance of the withdrawal in most qualitative studies. Cooperative inquiry is more complex. Tension and discomfort can be part of the developmental learning process in cooperative inquiry. Individuals who want to withdraw due to discomfort, and the need to explore uncomfortable feelings, makes the decisions whether to encourage individuals to stay and share or respect the need to withdraw difficult.

Cooperative inquiry seeks to transform relationships in a particular direction and as such needs to address questions of power. Hilson (2006) suggests this power is defined by our unavoidable ability to influence the lives of each other. This needs to be articulated as the consequence of the study for all of the participants. A Foucauldian understanding of power acknowledges that everybody has power, and focuses on how power is expressed and generated through social processes, material expressions and discursive practices (Gaventa & Cornwall 2001; Young, 1990). Re-conceptualizing power as "*a network of social boundaries that constrain and enable action for all actors*" (p72 Hayward cited in Gaventa & Cornwall 2001) highlights the need to consider how the group environment is affected by the exercise of power. Social boundaries are constructed, and reconstructed, through discourse and are "*worked out through the use of techniques of influence*" (p11, Buchannan & Badham 1999). Shaw (2002) used a spatial metaphor for the experience of power relations with concepts of 'inclusion-exclusion', where we draw boundaries between the members of a group, and is the most obvious way we experience power relations. This implies that individuals become objects of change rather than agents of change, which seems contrary to a spirit of a collaborative endeavour. It would be naive to assume that these processes don't operate and there needs to be an awareness of the politically constructed context in which the project is set.

The hierarchical nature of the organisation suggests that it may be difficult to facilitate collaboration. This could create tensions if the expectations of the organisation and socialised behaviours of the individuals within the institution, are contrary to the endeavours of a participative approach. Reason & Heron (1995) noted that participative inquiry is a political process which is about "*deciding for others, with others, and for one-self.*" (p122). Within a community of peers this approach offers support and the creative and corrective feedback of other views and possibilities. Where the structures and processes are bureaucratic and hierarchical it could illicit unhelpful behaviours (Heron & Reason 1995) from staff socialised as part of that organisation. Heron & Reason (1995) contrast unhelpful behaviours with the principles and behaviours expected within participative relationships. Behaviours could be influenced by conformity and peer pressure. So instead of autonomy there would be narcissism, wilfulness and isolation. These 'unhelpful' behaviours limit participation. The challenge is to facilitate behaviours that reflect the principles of cooperative inquiry, which can be maintained in "*self-correcting and creative tension*" (p122, Heron & Reason 1995). These creative tensions could make the process of consent more challenging. When someone wants to withdraw due to discomfort, this may not be in the best interests of the individual or community, and encouraging someone to stay could facilitate learning. Deciding whether something is of benefit requires a value judgement. Although cooperative inquiry participation would indicate an opportunity to explore an individual's withdrawal, there are some ethical considerations of consent for the inquiry.

Written consent provides permission to take part in the study but continued consent and withdrawal may be problematic. Meyer (1993) suggests that consent in action research is always to some "*degree forced*" (p1066) particularly when the group dynamics are challenging. Although Meyer (1993) indicates that consent should not be abandoned in the face of opposition, it implies a degree of coercion that sits uncomfortably in a collaborative process. While I agree with Meyer that consent should not be abandoned, this overlooks

the delicate balance of respecting a person's right to withdraw their consent and helping them to develop as part the learning process. This is not about forcing consent but challenging the basis for the desire of the individual to withdraw from the study. It may appear contrary to the ethos of willing collaboration but it is a pragmatic approach. The aim was not to abandon informed consent when tensions arise but to reconsider the ethical principles particularly if conflict was part of the learning or could lead to coercion at any stage of the cycle (Carson et al 1989). It was my intention to ask for ongoing verbal consent where there were any ethical concerns and particularly if members of the group found the process challenging. Finding a way to do this sensitively and in the spirit of collaboration could be demanding, but as Carson et al (1989) argued that if action research is truly collaborative then issues can be resolved through mutual discussion that utilises the ethical principles of openness, caring, negotiation and responsibility. The aim would be to provide a way to discuss the reasons for someone wanting to withdraw (as much as it revealed and knowable) without breaching ethical principles.

4.2.10.4 How can the researcher avoid doing harm to the participants?

Williamson & Prosser (2002) noted that action research has political consequences and asked how the researcher can avoid doing harm to the participants. They suggest two responses: the establishment of ethical codes and the extent to which the collaboration enables the co-inquirers *"own the findings"* (p590). Although codes and rules may appear to offer a way to control the effects of the research on all of the participants it did not appear appropriate for an inquiry that uses negotiation and collaboration to resolve ethical issues. Cooperative inquiry evolves; any preset code could also become restrictive.

The basis for involvement in co-operative inquiry is full participation, which includes shared responsibility for the findings (Williamson & Prosser 2002). This implies all members take responsibility for any political consequences. However

this overlooks the potential ramifications of a hierarchical environment, which could lead to potential tensions and clashes between the inquiry recommendations and institutional agendas. Coghlan and Brannick (2001) indicate that researchers have a duty to protect their co-researchers from potential harm. Despite the apparent paternalistic distinction between researcher-researched roles, the issue has relevance for this project and how the findings are represented in the final inquiry report. Recognising my dual roles as a co-inquirer and a manger, I felt I had a responsibility to protect co-inquirers from any potential harm as a result of details presented in the published work. Although I have argued this report represents my viewpoint, the details I document would reveal the co-inquirers involvement through the use of the participant's experiences to provide contextualisation for my doctoral report. What is revealed in the report needed consent from all co-inquirers. To do this I intended to provide access to the developing and final document. The co-inquires should be able to ask for changes that risked the report lacking some validity (due to omissions or changes) but respects and allows the participants to protect their individual stories.

4.2.11 Data Collection and analysis

4.2.11.1 Introduction

The data collection and analysis in cooperative inquiry is not separate but simultaneous. As Barnsley & Ellis (1987) explained, for any action research study, data analysis begins while the research is in progress as well as after the data has been gathered. So the transcripts, focus group feedback and meeting notes will be used as evidence which supports the codes identified that are described, shaped and reshaped as the evidence is accumulated.

Probably the most difficult part of the process will be using the qualitative evidence to create the themes to inform the applied research strategy. Marshall

& Rossman (2006) noted that the process of bringing order to collected data is messy, ambiguous, time consuming but creative. This resonates with the untidiness of cooperative inquiry approaches, but at the core of any qualitative analysis are some core related processes of describing phenomena, classifying it and seeing how the concepts interconnect (Richards 2005).

4.2.11.2 Analysis

The analysis of the data will draw on the four general stages outlined by Richards (2005):

1. Processing the evidence -
   editing, coding, sampling. Conceptual and theoretical;
2. Mapping the data -
   noting the frequency of recurrence of issues, themes, and units;
3. Interpreting the evidence -
   interpreting data, building a model;
4. Presenting the results -
   reporting evidence; drawing conclusions.

4.2.11.3 Processing the evidence

The decisions made in each phase of analysis will have consequences for what followed in the research process. Simply put, data analysis is:

> *"...a process of sifting, sorting, discarding, and cataloguing in an attempt to answer two basic questions: (1) what are the important themes in this data? and (2) how much data support each of these themes?"* (p48, Sagor 1992)

Heron (1996) does not provide any details on how to approach cooperative inquiry analysis, and as many qualitative researchers, tends to gloss over how develop the data coding. Some qualitative researchers highlight the benefits of computer software, but provide little guidance on the intellectual work of data coding (Crabtree & Miller 1992).

The inquiry could draw on a general qualitative approach but there are numerous approaches, whereas grounded theory appeared to have synergy with the emergent nature of action research. I proposed to borrow the data analysis methods from grounded theory (Strauss & Corbin 1998).

Grounded theory originated in the work of Glaser and Strauss (1967) as a:

> *"..method for discovering theories, concepts, hypotheses, and propositions directly from data rather than from a priori assumptions, other research, or existing theoretical frameworks."* (p137, Taylor & Bogdan 1998)

In grounded theory, the theory emerges from the data that is relevant to the researched situation. Traditional grounded theory aims to produce new concepts and theories and is used to uncover the social processes. One of the main strengths of grounded theory is that it explains what is actually happening rather than suggesting what should be going on (McCallin 2003). It provides a way to understand the behavioural patterns that emerge within groups as people identify situations that are common in themselves and others in the group.

The theoretical concepts using grounded theory emerge through the activities of data-collection, note-taking, coding and making theoretical links between the codes. All these activities are carried out simultaneously until a 'core category' emerges (Dick 2000). This 'core category' is a central concern to the people in the researched situation to which categories are linked to create the code. This involves selecting and providing names for categories (open coding); seeking

causal relationships between data sets (axial coding); selecting a core category and systematically relating the data to the core category (selective coding) (Strauss & Corbin 1998). The process only ceases when no further categories emerge. Grounded theory progressively builds a theory by collating information and comparing it to other data to create a cohesive narrative.

Using a grounded theory approach has synergy with the emergent nature of action research. Glaser (2001) indicated that theory development is not always possible in small projects, but it could be used to describe and explain underlying social processes shaping interaction. As McCallin (2003) stated, theoretical development does not need to be the main goal, what was more important was that the researcher was capable of analysing the data. Using grounded theory data analysis could be useful as a way to describe the reasons for staff resistance, which could inform the development of a departmental applied research strategy. Although the development of the strategy will be grounded in the data I make no claims for grounded theory only the use of grounded theory for data analysis.

The difficulty of drawing on grounded theory for analysis is the impenetrable jargon used to describe the methodology in the original Glaser & Strauss methodology. The two originators have diverged in their understanding of grounded theory that has provided different approaches on the nature of coding and what is considered data (Kelle 2005). Strauss published a version of grounded theory and then teamed with Corbin (Strauss and Corbin 1998). Although Strauss & Corbin (1998) appear to have tried to make grounded theory processes accessible, the coding seems elaborate and, in some respects, a more constraining process as data is used to fit a predetermined coding system (Dick 2000, Kelle 2005). Whereas Glaser (2001) uses a form of grounded theory which appears to be less restrictive and can be integrated into the evaluation of the inquiry cycle (Dick 2000).

Glaser's grounded theory considers all data of value. This means interview, observational data, surveys, statistical analyses or fiction can all be used in the comparative process to develop concepts. The aim is not an accurate description of the data, as in other qualitative designs, but to generate concepts that explain people's actions regardless of time and place. The description is mainly to illustrate the concepts.

Glaser (2001) suggests that analysis can be achieved by:

- Comparing any two data sets that overlap;
- Where the two data sets overlap and agree, disconfirming evidence is vigorously sought in further data collection;
- Where two data sets overlaps but disagree, explanations for disagreement is sought.

(Cited in Dick 2000)

I have argued that the analysis for the project will draw on a grounded theory approach but others have considered this eclectic approach unhelpful. Chatlip (1998) goes so far as to argue that using grounded theory to support research analysis without being true to the research method is tantamount to *"bastardising research methodologies."*(p2). White et al (1998) refutes this extreme argument suggesting this view repeats a common misunderstanding of the philosophical roots of debates surrounding the choice of a method by confusing the ontological assumptions with epistemological preferences. She then goes onto argue that realities are socially constructed, and actions and outcomes have meanings, which must themselves be interpreted. There are similarities between the comparative method of coding with a general inductive approach to data analysis creating descriptions of human behaviour. However

by drawing on grounded theory the aim was to use a comparative method to develop codes that could provide more than just a description. Instead the aim would be to conceptually weave the codes to craft a story about human behaviour that could be used to inform the development of a departmental applied research strategy.

4.2.12 Summary

The focus of the inquiry was the development of a departmental applied research strategy using a collaborative process. The creation of the strategy would enable a constructive dialogue with the department staff so the staff would have ownership of the strategy that could facilitate a cultural change. Since cooperative inquiry is a collaborative process, the design, data collection and analysis is only tentative at this stage. The inquiry design would be negotiated and agreed with the co-inquiry group at the start of the project.

4.3 Methods - the Cooperative Inquiry Applied to the Department Setting

4.3.1 Introduction

The project was developed in response to the university setting departmental research targets. The departmental staff were primarily teachers and were resistant to engaging with research. The aim of the project was to develop an applied research strategy for the Nursing Department using cooperative inquiry. By using a co-inquiry group the intension was to facilitate a constructive dialogue with the departmental staff as a way to create an applied research strategy. In this way it was hoped the staff, having been involved in the strategy development, would have ownership of that strategy, which could facilitate research engagement.

The objectives agreed by the co-inquirers were that the project would enable the:

(1) Development of a departmental applied research strategy using a collaborative process taking account of the views and perspectives of the departmental staff;

(2) Creation of opportunities for a constructive dialogue with the departmental staff to gain their views and perspectives of applied research as part of an academic role;

(3) Development of a cultural change in the department through the staff owning the research strategy and engaging with research.

4.3.2. The cooperative inquiry

4.3.3 Ethical approval

For this departmental project, as in any research inquiry, participation needed to receive ethical approval. The doctorate proposal received ethical approval through Sheffield Hallam University Ethics Committee (Appendix 2). A copy of the proposal and the ethical approval was sent also to the ethics committee in the university in which the project was to be set. The chair of the ethics committee considered the ethical approval from Sheffield Hallam University to be sufficiently robust and so gave verbal permission to proceed with the inquiry. In addition, I received verbal permission from the Dean of the Faculty (where the departmental inquiry was set) as the project was relevant to the organisational vision and targets. The verbal permission from the Dean allowed the project to commence although I was aware that the permission could potentially be withdrawn as the project progressed if it did not appear to address the departmental targets. This was a threat to the viability of the project that I sought to minimise by discussing the project at my monthly supervision sessions. I recognised that keeping my line manager informed was no guarantee of continued consent, but by discussing progress and the direction of the research I found it was possible to address the concerns early. This enabled me to discuss any issues both with my line manager and highlight any issues with the project inquiry group that helped to reduce the risk of organisational consent being withdrawn.

4.3.4 The collaborative enquiry group (CEG)

The CEG began through an *'initiators call'* from me as the initiator. The invitation was for volunteers from the departmental staff to join a collaborative enquiry group which would have an inaugural meeting on the 24th April 2007.

The invitations were sent to staff in early March 2007. The department represents a diverse academic and health professional profile. The academic profile of the Department consists of 52 staff. The mix of academic roles

includes senior lecturers (37); lecturers (7); principal lecturers (6); and lecturer practitioners (2) (seconded into the department to support the teaching).

I used the teaching teams to invite involvement in the CEG with the underlying principle of voluntary and informed self-selection from each teaching team. In hindsight by sending out invitations, which replicated the teaching team structure I may have implicitly emphasised the importance of the teaching. Despite this implicit message, using this approach had some logic and is defensible in terms of the existing organisational structure.

Collaborative inquiries generally invite any interested others to join a study. Inviting anyone from the department of 52 members was in the spirit of the process, but I was concerned that I may receive more responses than would be practical to create a small inquiry group. Using the process of voluntary self-selection, I would feel morally obliged to include all who accepted the invitation. I may also receive more responses from one team, which could disproportionately represent the larger teams' views. Other studies, with large numbers of volunteers, have used multiple groups (For example Canter 1998) but that resulted in an unwieldy process with disparate views, which were difficult to draw together as a consensus. I was aiming for a minimum group of six members to represent the occupational groupings and a maximum of eight for a small interactive inquiry group.

To try and manage the process of invitations the nominations were through a 'random' selection process (names out of a hat). This would avoid any attempt on my part, however inadvertently, to select the CEG membership. I initially sent out sixteen invitations. I anticipated not everyone would want to join the group and estimated a return rate of 40-50% to achieve between six and eight members. Restricting invitations in this way is not usually a feature of cooperative inquiries, but Mead (2002) in a study within the police force set eligibility criteria, based on police grade and rank, to avoid being overwhelmed by potential applicants. Mead's (2002) study, despite the restrictions imposed

on numbers, still upheld the underlying principal of voluntary self selection, which was in the spirit of cooperative inquiry.

To limit the possibility of any individual feeling coerced to join the CEG, I sent the letters via a secretary with instructions to return them via the same route. While this meant that the invitations were not a direct personal invitation as in other collaborative inquiries (Oates 2002, Mash et al 2005). A personal invitation was more likely to improve the response rate, but by using this indirect approach gave departmental staff space to refuse by not responding.

Each team was invited to participate, with numbers of invitations sent to each team according to the team size, with the aim to replicate 25% of the team composition as far as practical. The first wave of invitations was sent out with consent forms (Appendix 3) to all of the teaching teams. There were six invitations sent to the adult team as the largest team; two invitations to the paramedic team, midwifery, child team, managers, one to the ODP and one to the non-health care professionals as part of the health studies team (Table 2, p 83).

Despite my concerns about the potential high numbers willing to participate only five staff members returned consent forms, with only four turning up for the first meeting. The final group was well mixed in terms of academic background which included senior lecturers and principal lecturers, but the occupational groups were less well represented. There were adult nurses and a midwife with one non-health professional. A member of the child team agreed to attend but did not turn up for the first meeting.

At the first meeting the CEG examined the configuration of the inquiry group. It appeared that the inquiry group did not fully represent the departmental teams. In particular the paramedics and ODP lectures had not responded, and all but one of the inquiry group members were relative newcomers to the university, with less than three years of employment. The CEG recognised that a project

exploring research engagement was likely to produce a group that had a positive inclination towards research. Equally, there was a concern that the inquiry group could be marginalised by virtue of their enthusiasm for research and relative short tenure within the department. We were not sure of the impact of the composition of the group would have on the inquiry but we agreed to try and increase the representation. Invitations were sent to all of those who were not originally approached, particularly from the teams not represented. This accounted for a further twenty invitations to attend the second meeting.

The previous response to our invitations accounted for 31% of the sample so by sending out twenty invitations we hoped to increase the CEG by at least another 30% (four to six members). The invitations were allocated according to the size of the teaching teams so that representation did not disproportionately represent the larger teams (Table 2, p83).

Out of the twenty invitations sent out, I received four responses. This could potentially increase the group to nine members including myself. To avoid increasing the group further the CEG agreed not to send out any further invitations. The four responses represented the teaching teams, which included an ODP, child nurse and nurse/paramedic and one further adult nurse representative. It was agreed by the CEG that we would work with the participants who had indicated a firm commitment. This was a pragmatic decision so that we could begin the data collection.

At the next CEG meeting, despite the positive intentions of the additional members, only one new member, a dual qualified nurse and paramedic, attended. We agreed that those who had shown interest in the inquiry but hadn't attended should receive details of our further agreed meetings but if they did not attend the next meeting we would work with the small group of six. I sent out the meeting details via email and although I received apologies for the subsequent meetings none of the potential participants attended.

Table 2:

Numbers of invitations sent to the department teaching teams

Team	Team numbers	1st wave of invitations	2nd wave of invitations	Overall percentage Invitations
Dates		March 2007	May 2007	
Paramedic	5	2	3	100%
ODP	3	1	2	100%
Midwives	7	2	2	55%
Managers	5	2	3	100%
Child nursing	4	2	2	100%
Health studies	4	1	3	100%
Adult	24	6	6	50%
Total	52	16	21	69%

The only group that did not respond at all to the invitation to join the CEG was the management team, although one later consented to be interviewed. Including the manager group may have complicated the boss-subordinate relationships but their presence may have added a dimension to the discussion. How far the mangers' decision was a political statement about power and control was difficult to determine but they had the potential to undermine the project endeavour to create change.

The final size of the CEG was six members including myself. Not everyone was able to be present at all meetings but there was a minimum of four at each meeting.

4.3.5 Initiating the inquiry

4.3.5.1 Introduction

This section explores the inaugural meeting of the CEG on the 24th April 2007 and the emergence of the inquiry methods. In the spirit of the evolutionary journey of cooperative inquiry the co-inquirers worked together to develop a proposition (the question to be investigated); the data collection methods; data analysis and how the data would inform the departmental applied research strategy.

4.3.5.2 The first meeting

As the initiating researcher I needed to consider three inter-related issues at the first meeting (p62-63, Heron 1996):

1. Initiation of members into the method so they can make it their own;
2. Emergence of joint decision-making and true collaboration;
3. The creation of an open, sharing climate.

I outlined the purpose of the group as a collaborative (cooperative) inquiry to develop an applied research strategy validating our views through sharing with their teams. The aim of the inaugural meeting was to develop the group as co-inquirers and start the reflective process.

Initially the inaugural meeting felt like a steering group as I led (or appeared to chair) the discussion. I attempt to reduce the sense of hierarchy by sharing my motivations for the inquiry. I outlined my concerns as a head of department about the barriers, which could impede an open dialogue. I recognised that my desire to meet the departmental drivers, research targets and complete a

doctorate report could lead me to try and take the lead to meet my priorities. However, as a manager and initiating researcher and I felt I needed to move from a higher to a *'lesser rank'* (p41, Heron 1996) to create equality in our collaboration. This openness gave a kind of 'permission' for the co-inquirers to share their concerns and they also began to talk openly about their own motivations and goals.

Each joined the group as co-inquirers and had various motivations at the start of the study (Table 3, p 87). The first meeting only had four other members (five including myself). Tim joined at the second meeting when he explained his reasons for joining.

The group met in stage 1 to set up the study, and then in stage 3 and 4 of the inquiry cycles. The additional meetings provided a useful catalyst to explore reflections (and data collection) collaboratively.

At the first meeting the CEG discussed how the group would operate and agreed some ground rules:

All members would;

(i) participate by presenting their own reflections;
(ii) use the team members feedback to inform the views of the group;
(iii) not identify individuals when feeding back team views;
(iv) share each of the course teams views;
(v) be respectful of others views within the group;
(vi) respect the confidentiality of the group interactions.

The CEG met reflected and told stories of experiences and perceptions of research collated from the course teaching teams. Heron (1996) describes other forms of "p*resentational knowledge"* (p 52) such as art and music but the

CEG agreed they would use discussion only. This may have lost an opportunity for greater insights but the group did not feel comfortable in using other forms of expression. The group collated data using reflections and knowledge to frame the *"propositional knowledge"* (p52, Heron 1996), which was used to create the departmental applied research strategy as *"practical knowledge"* (p52, Heron 1996).

4.3.6. Agreeing data collection methods

It was agreed that qualitative data would be collated to support the development of the departmental applied research strategy. The data collection methods were discussed and agreed as meeting notes; focus group feedback; research notes; reflective diaries and interviews.

The CEG noted that quantitative data may strengthen the study evaluative outcomes from a university target perspective, but the short duration of the study meant it was difficult to quantify research outputs, which often require longer timescales. Quantitative data (numbers of staff engaging in research, type of output etc) was not collated as part of the study, but was data collected as part of the university cycle of statistical analysis that are used to measure success at meeting departmental targets. During the year of the study details of staff involvement at the beginning and end of the academic year in scholarly outputs (papers of books published, papers or posters accepted for a conference, produced a book) and applied research activities were collected. The end of year descriptive statistics of 2007-2008 indicated a rise of 21% engagement. The data provided a useful indicator of changes, but we could not make any specific claims of causality for the departmental project as it was part of the work of the university and faculty strategy for change. It was possible to suggest that the departmental study was part of the process of helping staff to engage with applied research activities.

Table 3: Collaborative enquiry group members

Name	Qualifications	Occupational group	Motivations
Chris	MSc, BSc, RGN, RSCN	Head of Nursing Department Nurse (Adult & child) Research supervisor	To achieve a doctorate and meet department targets
Colin	PhD, MA, BSc	Public health epidemiologist Researcher Principal lecturer	Developing an applied research interest group (Public Health) and saw this as an opportunity to improve staff interest
Margaret	MSc, BSc, RGN, PhD	Senior lecturer Adult nurse Part time researcher	Just completed her PhD. Had a role to improve the research skills amongst nurses and wanted to explore how to do this in the department
Philip	MSc, BA, RGN	Senior lecturer Adult nurse	Teaches research and is compiling a PhD by portfolio. Thought this may be useful as part of that work
Mary	MSc, Diploma, RGN, Midwife	Senior Lecturer Midwife	Had an interest in research and was exploring whether to do a PhD. Interested in developing a publication from the study
Tim	MSc, BSc RGN	Senior lecturer Emergency care/Adult nurse	Just started own PhD and wanted to get insight into 'doctorate' level and processes

4.3.6.1 Data collection - meetings notes

The CEG agreed to keep a record of our meetings minutes as a useful 'aide

memoir' to our discussions. I agreed to take brief notes at the first meeting and then write them up fully at the end of the meeting. I then emailed the full notes to all members of the CEG for comments or amendments. This was considered a useful process and became the pattern adopted through the project. I had hoped others in the group may be willing to take on the responsibility of keeping notes but the group felt that the notes I had taken were an accurate record and were happy to let me continue in this role.

I had made the decision for the first meeting not to digitally record the meeting. However in the spirit of cooperative inquiry I asked the group if they wanted a have a recording and a fuller transcript of the meetings. The consensus was that recording wasn't needed. On reflection, some 'heated' discussions. meant notes rather than a transcript provided something that was less emotionally charged and easier to circulate. I noted, as a consequence, which some members of the group appeared to relax as there appeared to be no restrictions on the narratives that emerged.

4.3.6.2 Data collection – research notes

I made research notes as an additional source of data. The notes were an attempt to try and tease out the codes as they emerged during the CEG meetings. This data was presented as a summary at the end of each meeting. The table had codes on the horizontal axis and quotes or notes across the vertical axis to indicate what evidence supported the theme. These tables were used as part of the discussion and analysis, and were amended at the meetings as further data emerged to either confirm or provide new insights and codes.

4.3.6.3 Data collection - reflective journal

During the inaugural meeting I shared the format I intended to use for my own

reflective diary and field notes. I explained this could provide contextual data, which would supplement the functional but limited detail of the CEG meeting notes. The inquiry group members were invited to keep their own notes and reflective journal to inform the discussions.

Members were comfortable keeping notes but there was some hesitancy in sharing the raw data of a reflective diary. The CEG felt that should they keep diaries (although not all were positive they would do this) but the personal and sensitive nature of the entries meant they, and I, didn't want them to become a source of unfiltered data for the inquiry group to review. We agreed the journal could only be used as filtered reflections not as raw data in the group meetings. Failing to share reflective diaries as a source of data seemed contrary to the spirit of transparency in action research. However the willingness to share insights (that could include diary reflections) seemed a useful negotiated compromise. It also provided a way to help the inquiry group members, who wanted to use a reflective journal, feel safe to document honest reflections.

I continued to provide entries after critical incidents in my own diary. The role of confidante was provided by my work-based supervisor and another departmental head who agreed to meet with me bi-monthly (although in reality we only met three times due to other commitments on both sides). The 'critical conversations' helped me explore my reflections and the complexities of being a doctoral student, manager and co-inquirer. The use of my colleagues as confidantes was helpful as they used their insider knowledge of the organisation to help me challenge some of my assumptions of the inquiry.

4.3.6.4 Data collection - focus groups

Each of the group members confirmed they would investigate their own team's views on applied research and what was needed for a departmental strategy. It was agreed that at each monthly course team meeting the co-inquirers would

ask their own course team members to reflect on the questions that the CEG formulated from the research proposition(s). The responses to the questions would be collated by the inquiry team member and the data would be presented at the next CEG meeting. The data collated from the course teaching teams would be used to inform the CEG analysis and help to formulate the themes, which would be used to construct a departmental applied research strategy.

The form and content of the team discussion feedback would be agreed by each course team and the CEG member would be the conduit for the course team feedback. Where there was no representative from a course team, as part of the CEG (such as the Child and ODP teams), I agreed to send the information to all members of the team via email to gain feedback. Although any feedback gained via email would not represent a consensus view of the team it would still provide an opportunity for that team to feel that they could participate and their views represented in the project.

4.3.6.5 Ethical considerations for the focus groups

Using written consent for focus groups raised concerns amongst the CEG members about the formality of the process with colleagues. There was a belief that the departmental staff would want to contribute to the strategy in a collaborative process since the project outcome would affect the whole department. The use of written consent made some members of the CEG uncomfortable as they believed it affected the normal process of collegiate working. Asking for written consent was felt to be unnecessary and bureaucratic, whereas verbal consent could be less intrusive. After some debate regarding the ethics of not taking written consent and recognising the importance of some form of consent, it was agreed that the CEG members would ask for verbal consent. The consent would be requested prior to when the team meeting would begin to collect data for project (at the end). We noted that any team member who did not feel comfortable participating in the inquiry

could have the option to not participate and leave before the data collection. This was not an ideal outcome but a pragmatic solution. If I insisted on formalised written consent it would be unlikely that I would have gained cooperation from the co-inquiry group and the project would not have been possible. However I recognised that I needed to re-review the ethical implications of not using signed consent forms as a researcher to ensure that our solution did not put the project ethical approval in jeopardy.

Obtaining consent was an important consideration for my accountability as a researcher. I recognised that the signing of a consent form has become standard practice in confirming that an individual has freely given their informed consent to participate in a research study (RCN 2006). Yet there are very few occasions where the law specifically requires written consent as, in the main, verbal consent is just as valid as written consent. Completed consent forms could have provided some evidence that consent was obtained, but it doesn't constitute proof that the consent was valid. The key issue is not whether a form was signed but whether individuals were given the information they needed to make an informed decision and the freedom to be involved or withdraw from the project. CEG members asking for verbal consent meant there was no supporting evidence of consent. I had some copies of circulated emails, departmental and team meeting minutes, which provided some tangible evidence but it was not written consent. The evidence supported that a process had been completed but not that informed consent had been given. However I was aware from informal staff feedback that consent was asked for (albeit verbally), and there were opportunities for individuals to withdraw before any data was collected ensured those who remained at the end of the team meeting had indicated consent.

4.3.6.6 CEG Data collection - Interviews

The CEG agreed that I should be responsible for the interviews as my

contribution to the inquiry group data collection. However the interviews were seen as an ongoing source of data to support the CEG meetings rather than an evaluation of the research strategy.

Interestingly there was not the same objection to signed consent forms for interviews. In part the acceptance was due to a combination of expecting written consent to be collected as part of a formal process for research interviews. This raised some anxieties for me as a researcher as it implied the CEG members did not consider the focus groups subject to the same ethical rigor. I was reassured by the CEG members that it was it was the use of a written process for gaining consent from colleagues, not the question of asking for consent.

Invitations to participate in the interview process were sent out to every team member who was not part of the CEG. It is possible that individuals could feel coerced into being interviewed particularly given my organisational role. So again I sent out a letter and consent form through the administration staff. The letter emphasised that participation was voluntary and refusal would not affect their role within the department (Appendix 3).

As the responses to invitations to join the CEG had been limited I sent invitations to all of the staff. I hoped this would result in six potential interview candidates. To create a personal engagement (without feelings of coercion) I invited anyone to discuss the interview process and the study without obligation. I received eight responses. Three individuals spoke to me and a further five sent emails. This translated into three signed consents from the adult nursing team, a manager and a paramedic.

Two weeks later I then resent out invitations to the teams who did not respond the first time. Three team members one from each of the teams, child, adult and midwifery, responded and agreed to be interviewed. A further three individuals expressed an interest but did not follow through by providing any

written consent. At the end of the process I received five signed consent forms for interviews.

I was aware that some participants may feel inhibited by the use of recording devices but I wanted to have an accurate record of the discussion. All interviewees agreed to allow the interview to be digitally recorded. I explained that the recordings were confidential, and that the typed transcripts would be coded with the anonymous transcripts shared only with the CEG members. The digital recorder (11cm x 3.5cm) sat unobtrusively on the table and despite my reference to it at the beginning to check sound levels it did not appear to intrude. Copies of the individual electronic recordings were downloaded to a laptop and accessed via a secure password. The individual recordings for each participant were only available to that participant to protect confidentiality. The interviews were transcribed and sent to the participants to check that they felt it represented their views. No one asked for any changes and they all acknowledged they had received the transcript.

The finalised transcripts had names removed and an electronic copy kept on a password protected laptop. All paper copies of these transcripts were kept in a locked cabinet (and I had the only key) while the CEG worked on the analysis. Once the analysis was complete the paper copies were collected and confidentially destroyed.

All participants were able to choose where they would prefer the interview to take place. With a sense of wanting a conversation in mind I provided coffee and cake, and candidates chose a cafe offsite. Each interview was scheduled to last approximately one hour. They lasted between 38-69 minutes. The two shorter interviews (39 and 38 minutes respectively) were much more difficult to sustain. One conversation was ended early as we appeared to be repeating ourselves. The other was when the participant left to teach (although they had originally agreed to an hour). Whereas the other three (55 minutes, 64 and 69 minutes) were much more engaging.

I began the interview by laying out the purpose of the research. I explained the interview process and my proposal to have a conversation and to explore the issues that the CEG had identified in the meeting discussion. At the start the exchange felt artificial. But once the participant began to talk the process became interactive, and the questions evolved from the discussion, which at times, became a humorous exchange over coffee. The 'judicious sharing' was through my agreeing with something they said, and then adding my own thoughts and at times sharing my experiences. The 'reciprocity' seemed to emerge at about 25-30 minutes into the conversation, once the cake was eaten and we were both working our way through the coffee. It was likely the candidates who had shorter interviews did not reach the level of reciprocity I had hoped for. For the longer exchange there was a sense it was long coffee break with two colleagues talking. When I reviewed the transcripts it seemed that all but one of the participants did most of the talking while I listened. On reflection it appears in normal conversation I am more of a listener so the interviews have reflected my conversational style. The equality in the exchange was where I was challenged to express my views and equally I was able to explore their views. What was unexpected was the enjoyment and catharsis that I got from this a social exchange.

4.3.6.7 Data collection - Staff meeting(s)

As part of the groundwork in for the study we used three departmental meetings to launch and update staff on the study. The responses provided some feedback on the developing strategy and provided insight into the staff concerns. I agreed with those present at the meeting to utilise their feedback to inform the development of the strategy. I took brief notes and wrote them up more fully immediately following the meeting. These notes, together with feedback from members of the co-inquirers present at the staff meeting, were shared at the inquiry meetings.

4.3.7 Data analysis

4.3.7.1 Introduction

Over a period of ten months the CEG reflected critically on the collated data that transformed our understanding of the academic role of occupational teachers. The data collection and analysis was simultaneous. The transcripts, focus group feedback, meeting notes and detailed research notes were used as the evidence that supported the themes, which were identified, described, shaped and reshaped as the evidence accumulated.

4.3.7.2 Analysing the data

During the analysis of the data the CEG used four general stages outlined by Richards (2005). The decisions made in each phase of analysis had consequences for what followed in the research process. The CEG used an inductive method, asking a number of questions:

- How does the data explain the reasons for the reluctance and resistance to engage in applied research?
- Has the data selection focused on the central issues of research and teaching?
- Does the data presented clarify the relationships between teaching and research values, beliefs and behaviour
- Does the interpretation explain the data satisfactorily?
- How does this affect our understanding and inform the strategy?

Although this project could have used a software data analysis programme the CEG opted to use a paper conceptual map that they felt was more visual and accessible for the group to review together. Although we developed a

framework borrowed from grounded theory (Strauss & Corbin 1998), and the framework was grounded in the data, we made no claims for grounded theory.

The CEG data analysis was a part of each meeting. It was agreed that at the end of each CEG meeting the group would summarise the data that had emerged. This data would then be compared to our ongoing analysis so we could shape and amend the codes that would inform the applied research strategy. The group looked for commonalities and through consensus we agreed the categories. As we coded the data, links between categories emerged that developed into a core category. Where data appeared to be in agreement the conceptual framework started to emerge, but it was difficult to know what to do with disagreements or isolated comments. Dick (2000) (who also borrowed from grounded theory) suggested that the differences are 'illusory' since each piece of data, although bringing disagreement, creates an impetus for a deeper understanding and more data collection in a search for explanations. Rather than worry about the differences in explanations we agreed to note them and review them as more data was collected. If they were shown to have support then we re-reviewed the data to see if the information brought any new insights. Isolated comments would be noted and it was agreed to only use them if further data collection helped to confirm or add to the codes.

4.3.7.3 Mapping the data

To draw the data together the CEG initially tried to use a predetermined matrix to map the codes, and show how the data supported the codes using a process explained by Thomas (2007). The codes reflected the elements of a research strategy that we needed to address around: (1) Limitations (barriers to research); (2) Enabling (support for research) and (3) Resources (what was needed for research, time, funding etc). The code 'Possibilities' (suggestions for change) was on the horizontal axis and 'Views' was used on vertical axis. 'Views' indicated that a view had been expressed repeatedly. The advantage

was the simplicity, focused and time efficient approach that could help progress the analysis. We quickly recognised that this template could limit the emergence of new perspectives as we constrained the data to match data to the prefigured codes. We abandoned the prefigured codes and allowed the codes to emerge from the data.

Using a sheet of paper, to document the data, we set out the information using a horizontal axis to map the codes and a vertical axis to map the evidence (focus group quotes, reflections of the CEG and interview transcripts Table 4).

Table 4: Template for research analysis

Source	**Evidence type**			
		Code	**Category**	**Category**

The codes developed as the inquiry progressed. The CEG also used a form of 'mind-map' to visualise how the codes and categories overlapped and created a cohesive narrative from the emerging data (see p169 for an example).

The mind-map illustrated how each category contributed to the main codes chosen. The sub-categories at times overlapped across more than one main code. However we chose to link each category to one main code for clarity recognizing the overlap and acknowledging that they could have contributed to more than one code. This allowed the CEG to visualize and discuss how each of the codes interconnected.

4.3.8 Groundwork – Communicating the study

As part of the groundwork in gaining co-operation from staff, I used five departmental meetings to launch and update staff on the study. These included meetings in:

1) March 2007 to launch the cooperative inquiry;
2) June, October & November 2007 to update on the progress of the Applied Research Strategy;
3) January 2008 to launch of the Applied Research Strategy.

4.3.8.1 Launch of the inquiry

The launch of the project within a departmental meeting was not an easy process. There was suspicion the research was a cover to impose the organisational objectives. At the first meeting, I agreed the organisational objectives were a driver to change but I argued this study could be a way to take control of the way in which we could meet those objectives.

Staff expressed some confusion about the doctorate and the departmental project overlap. I attempted to disentangle (where possible) the departmental project and my doctorate. I indicated the project was to develop a departmental applied research strategy, whereas the doctorate was about writing up my learning as part of the inquiry. I reassured the staff if anyone provided data for the departmental project that was to be included in the doctorate report, consent would be specifically sought for both. I also reassured staff that they could withdraw from the department or doctorate project as both required their consent to be involved.

4.3.8.2 First staff meeting

The first meeting was tense with staff expressing some anger at the expectation of the change to their roles. Their concern was the way in which they were being expected to be researchers without being given a reduction in their teaching workloads. These fears, although appearing reasonable, did not take account of university changes to module teaching hours in an attempt to create space for research. It was interesting that the staff did not perceive the changes as a positive improvement to workloads but as a way to justify redundancies. The staff delivered a response to the change with such negativity and aggression it left me feeling, at times, defensive and confused. I had expected staff to see this as a positive opportunity for empowerment.

On reflection, I realised I had expected an uncomplicated adoption of a cooperative process that empowered individuals, which is the starting point in the action research literature. I recognised there would be tensions as in any change process but it was the extent of the opposition I had underestimated. I assumed a willingness to co-operate as the staff would have some control over shaping the processes, but this was far from reality. The process created some conflict and at times anger from the staff that in part may have been due to the proposal to introduce change, which was neither recognised nor wanted. I felt the staff anger was a sign of failure. After the meeting I reviewed the literature on group development to find a way to improve the department's acceptance of the change. I found some new insights that helped to create a more positive outcome.

Commentators on group development assume groups go through a number of phases or stages (Brown 1999, Smith 2005). One of these phases is to learn (at some level) to deal with conflict if it is to survive (Smith 2005). The most influential model of the developmental process (in terms of the appearances in texts aimed at practitioners) has been Tuckman (Smith 2005). Tuckman's

model (Smith 2005) describes the stages as: forming; storming; norming and performing (Tuckman 1965). He was later to add a fifth stage: adjourning (Tuckman and Jensen 1977), as a stage in the completion of a study. Storming appeared to be an apt metaphor for this study.

The model recognises 'storming' as a vying for leadership that could explain my defensive reaction to what could be seen as a challenge to my role as a head of department. As a developmental process it meant we would have to work through this storming to enable the change to be both creative and productive. However the department's longstanding resistance to change suggested the 'storming' could only serve to intensify tension and conflict. Although resistance could be considered a response to change, it has the potential to challenge, disrupt discourses and power relations (Cooke 2006). The response to change may be expected but it doesn't explain the behaviour. Piderit (2000) suggested two other emphases besides behaviour; a cognitive state and an emotional state that overlap. Dent & Goldberg (1999) suggest that individuals aren't really resisting the change, but rather they may be resisting what they don't understand and/or the emotional effects such as the loss of status, loss of pay or loss of comfort.

It was tempting to view the resistance as negative particularly as it could disrupt the possibility of a collaborative change and the achievement of any departmental targets. However Dent & Goldberg (1999) suggest:

> "*...it is time that we dispense with the phrase resistance to change and find a more useful and appropriate models for describing what the phrase has come to mean - employees are not wholeheartedly embracing a change that management wants to implement.*" (p. 26).

The focus on the predetermined outcome meant I overlooked the positive and useful role debate and criticism can play in enabling effective change (De Jager

2001). This led me to re-evaluate how to engage staff in a collaborative and positive debate. In attempting to understand collaboration more fully I found the concept of *"knotty junctures"* (p 389) in the work of Sumara & Lace-Kappler (1993) useful.

Sumara & Lace-Kappler (1993) argued 'knotty junctures' was not a barrier but as a positive sign of constructive change. The discomfort and hostility generated, rather than being a destructive process, was healthy with opportunities for change to emerge at these difficult intersections. It isn't the actual change that individuals resist, but rather the transitions that they have to go through to accommodate the change (Bridges 2003). Morgan (2006) noted that to help individuals *"let go"* (p229) of the current way and move forward to the new way can rarely be done effectively by imposing a change. So rather than seeing the department conflict as a failure it became an opportunity to engage with dissent and find a way to incorporate the feedback into the strategy and so enable the transition into a new role.

I naively assumed the collaborative approach was not an imposition, but in one sense it was an imposition. The project demanded an engagement with change which wasn't wanted, requiring staff to relinquish some of what they held dear (teaching), for the purpose of acquiring something new (research). I had assumed that using cooperative inquiry would be perceived as a positive endeavour to help staff find ways of carrying what is valued (teaching) into the new role (teaching and research) rather than the sense of loss it created.

Recognising that 'storming' rather than being a destructive phase, could lead to constructive change helped me to recognise that the anger wasn't personal. It helped me to be aware (and hopefully reduce) my own emotional defensive reaction. I also gained an appreciation of both the cognitive and emotional impact of the change. My response was to create opportunities to communicate through departmental meetings through a further three staff meetings were to

give the staff opportunities to express concerns (and at times anger) and to enable the CEG to understand the issues more fully.

4.3.8.5 Update on progress through staff meetings

The departmental meetings were also used to collate staff views and created an opportunity to validate the CEG analysis. The meetings remained challenging and although less angry at times, the language was aggressive. Staff appeared to feel free to express their concerns, which gave me some confidence we would get some valid feedback while recognising that the data could be skewed by those who were more vocal in articulating their views.

Some members of the CEG were present at staff meetings and so we were able to triangulate our perceptions and use my post meeting notes to inform the strategy. In hindsight the outcome was positive (although it didn't always feel so at the time) as the staff provided some additional data to inform the developing strategy. The data was discussed and incorporated into the learning-in-action cycles. Although the CEG made sense of the data through a consensus it was through the lens of our own feelings, experience and attitudes. The challenge was to recognise our bias and use the wider staff feedback to validate the study.

4.3.9 Launch of the departmental applied research strategy

The final Departmental Applied Research Strategy was launched in January 2008 at a departmental meeting and then circulated electronically to all staff. It is not possible to determine the full impact of the inquiry process and outcome on the change that occurred as it was part of a wider university strategy. However it is one feature of an organic change process that developed within the department. It is my intention to explore the inquiry learning and interpretation (making sense of) the data as part of this change process.

4.3.9.1 The ongoing inquiry – Further CEG meetings

The success of a cooperative inquiry depended on the goodwill of all of the participants. As Reason (1988) noted;

> *"You can't just set up a cooperative inquiry group, because cooperative processes have to be negotiated and re-learned by every group in every new instance."* (p19)

Mead (2002) noted that every collaborative inquiry will follow its own unique path but a number of practical issues arose in sustaining the CEG. The first, to which I have already alluded, was the difficulty of getting everyone to meetings. The CEG agreed to meet a further nine times between March 2007 and January 2008 that were spaced about 4-6 weeks apart. The meetings were scheduled to last one and a half hours. Most over ran by about 20-25 minutes and naturally ended when individuals needed to attend other meetings. We never had a 'full house'. One member dropped out due to tensions with another group member, and some never attended despite giving positive verbal commitments, and some stayed on the fringe communicating through email. Nevertheless, there was an identifiable core of four who remained deeply involved throughout. Work pressures impinged on meeting times and despite pre-arranging the dates of meetings for the whole year we only met seven times. Without advance planning it is doubtful whether any of the meetings would have been sufficiently well-attended to be worthwhile.

4.3.10 Making sense of the data

The CEG met at stage 3 and 4 of the inquiry to make sense of the data. Heron (1996) describes the 'making sense' as the heart of the inquiry. Data analysis requires that the co-inquirers are comfortable with developing categories of inquiry while making comparisons and contrasts. It also requires that the

enquirers are open to possibilities and see alternative explanations for their findings when needed. Creswell (2003) noted;

> *"...the process of data analysis in qualitative research is eclectic, that is, there is no right way"* (p 153).

As co-inquirers, we analysed the data collected from the focus groups with their teaching teams, research notes, interview transcripts and department meetings as modes of participative knowledge in cyclical sequences. The conclusions of the co-inquirers were grounded in their own participative knowing. The ideas generated were shared with the teaching teams to ensure that what we considered realities had validity beyond the CEG.

To limit negative tensions within the CEG we attempted to model the ethos of the cooperative inquiry. We were open to negotiation and allowed for ideas to be initiated from others. We agreed that any of us could choose the issues they wanted to explore and the inquiry outcomes would be agreed through consensus. I wondered at times if some participants took ownership of the process or whether they saw the inquiry as belonging just to me particularly as I initiated the project. As the group continued to meet, the lively disagreements indicated a willingness to challenge my views that gave me more confidence in the group ownership.

In the early stages, I took some control and provided direction by providing details about cooperative inquiry and methods of data collection as the group was new to this methodology. The fact we were all novice cooperative researchers meant, without my intervention, there could be a loss of direction and commitment, but I was equally concerned that frequent intervention could lead to group members not taking individual responsibility as part of the group. At times, I thought my usual leadership role led me to be vocal and I struggled with the issues of power and responsibility due to the juxtaposition of my roles. I also noted at times others were more vocal in some situations, which dominated

the discussions. The result was that discussions may not have always fully represented the views of all members of the CEG in the interpretation of the data. However I noted more vocal group members invited quieter participants to give their views, which provided opportunities for a fuller consensus. The issues of equality and power may have meant that equality had not been fully realised but we achieved a democratic intent to facilitate authentic collaboration.

4.3.11 The cooperative inquiry project

The study ran from 28/03/07 until 15/01/08. During this time, the inquiry completed two action cycles. We collated data from the department meetings, focus groups, CEG meetings and interviews. The findings emerged from the cyclical process of developing propositions, data collection, reflection and interpretation of the data.

The two cycles incorporated a series of meetings through four phases of the cycle. Through each cycle the CEG met three times. In addition we had three departmental meetings where the wider departmental staff gave feedback on the developing research strategy. This process enabled the creation rather than an evaluation of the implementation of the research strategy. This is not a usual approach in cooperative inquiry. Normally the cycle contains an element of an act (action) and evaluation (research) repeated in a cyclical process. Yet as the study developed, the boundaries between action and research became blurred. The actions became imbedded in the 'sense-making' processes of the CEG analysis. Essentially the 'sense-making' became the action. Action as 'sense-making' could be criticised by not being a conventional action. Action learning faces similar criticisms about the apparent lack of action (Ashton 2006).

As in this cooperative inquiry, action learning co-locates action and learning and actions are sometimes hard to differentiate from the learning process (Pedler & Trehan 2007). The 'sense-making' of this cooperative inquiry is the action but this is not a concept that sits comfortably within an action research framework.

This inquiry was an active process in that we used the 'sense-making' process to create a meaningful applied research strategy. The 'sense-making' both generated a shared understanding and also became the action. It may be argued that this approach has more synergies with action learning. Experiential reflection, which is the heart of cooperative inquiry, is a significant component of action learning which may have blurred the distinction between the two approaches.

4.3.11 Summary

This section explored how as the initiating researcher, I invited participants to join and convened a co-inquiry group. The co-inquirers shaped the direction and outcomes of the study. This meant at the start the research was neither singular nor linear as the design was emerging. Data was collated from focus groups, interviews and reflective diaries, with care to ensure that the egalitarian values of participation in cooperative inquiry were protected. The data was analysed and themes developed through a group consensus. The wider departmental staff provided feedback to strengthen the validity of our findings. The aim was to gain a shared understanding of the opportunities and challenges that affect staff engagement in applied research activities and then use this understanding to construct a departmental applied research strategy.

Chapter 5.0 – Findings: Introduction to the Chapters

5.1 Introduction

To provide a structure for this report, I have created two findings chapters. These are the learning-in-action outcomes chapter (Chapter 6) and the research outcomes chapter (Chapter 7). Cooperative inquiry does not usually separate the research outcomes from the learning process as it is;

> *"...two simultaneous inquiries, one that focuses on the chosen topic and the latter that is about the whole business of doing cooperative inquiry".* (p 110, Heron & Reason 1996).

I recognise the two outcomes are not separate but interrelated. By presenting the two chapters separately I felt it helped to improve the logical sequencing and accessibility of the report.

Heron (1996) describes the business of doing the inquiry as learning-in-action or *"second order outcomes"* (p110). Whereas the focus on the topic, are the research outcomes described as *"first order outcomes" or "meta outcomes"* (p110). Both outcomes are equally important but by using the terms first and second, Heron (1996) seems to have inadvertently stressed the importance of the research outcomes. This was not Herons' intention since he stated that he found any report which was *"more about meta-outcomes frustrating"* (p110). Heron (1996) considered that both outcomes needed to be presented in a way to illustrate their interdependence.

The complexity of presenting both outcomes in a single report is illustrated by the way in which published reports either focus primarily on the learning or research outcomes. Focusing on one outcome at the expense of the other means the account fails to illustrate the iterative nature and interconnections between the learning and research. Heron (1996) argued that presenting the

combination of the three components (narrative, first and second order outcomes) is the heart of understanding a cooperative inquiry.

Despite the intricacies of combining the three components, I will endeavour to show the interdependence of the learning-in-action, and the emergence of the research codes within a narrative. The story will be extracted from the data as it unfolded by using the meeting notes, transcripts of the interviews and my own reflective field notes. At times, I will retrospectively reflect on the process to draw attention to any insights, inconsistencies or bias in our deliberations. The narrative will be supported with quotes from the study data meeting notes (MN), focus group (FG) and interview transcripts (T). Each quote will be indicated by quotation marks and *italics*. It will be denoted by T (transcript), a number from 1 to 5 to denote that transcript the quote was taken from and then a time index number (hours; minutes; seconds) to indicate where the quote can be found in each transcript (Appendix 5).

Presenting a report has required a simplification of the development of an applied research strategy which may belie the complexities of a project that challenged the identity of a teaching and occupational role. It was noteworthy that the department dynamics, university politics, and the beliefs and values of the CEG moved into the foreground on several occasions. However rather than cluster them together, I prefer to consider them in the particular contexts in which they arose. In this way it will hopefully be possible to avoid the presentation of a "*victory narrative*" (p22, McClure 1996), which appears to create a linear story of certainty and resolution. To show the complexity and reality of the project I have attempted to draw attention to the successes and limitations of the inquiry through reflection as a way to improve the authenticity of the story.

Documenting the iterative nature of the cooperative inquiry study may be constrained by the structure of the report presentation. However it is my intention to try and capture the outcomes that allow the untidiness; the

challenges; mistakes and the tentative outcomes to emerge through the two research cycles, which occurred from April 2007 to January 2008 (Figure 3, Cooperative inquiry timeline, p108)

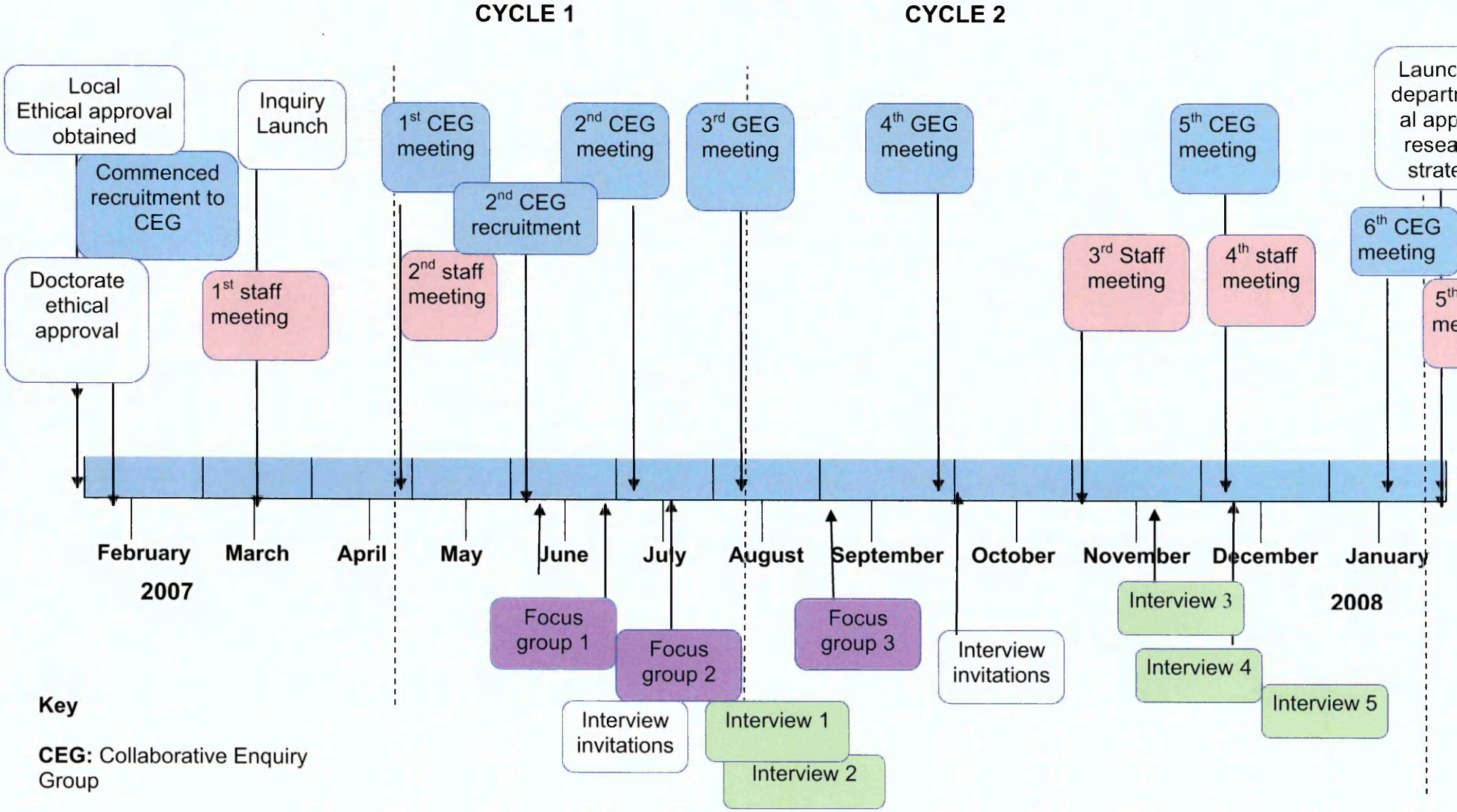


Figure 3:

Cooperative inquiry timeline

Chapter 6.0 – Findings: Second Order Outcomes (Learning-in-Action)

6.1 Introduction

Chapter 6 is one part of the findings chapters and represents the 'second order outcomes' (learning-in-action). This chapter presents an iterative account of how the findings of the cooperative inquiry emerged and how the CEG talked, reflected and integrated the data generated into the development of a departmental applied research strategy.

It has been challenging to show the emergence of the learning through the interactions and repetitive cycles of the co-inquirers'. Although the study was a collaborative process (and this describes the work of the departmental inquiry group) this report it is seen through the lens of my learning.

To provide some structure to this chapter the findings will be presented using the two learning-in-action cycles;

(1) **Cycle 1** - What is limiting the development of applied research?
(2) **Cycle 2** - Is this is what is needed in an applied research strategy?

The cycles did not have titles during the project. I have added them retrospectively, for this report, to provide a focus for each section of the chapter.

6.2 Cycle 1 - What is limiting the development of applied research?

6.2.1 Introduction to cycle 1

The first cycle of the cooperative inquiry was from April 2007 until July 2007. During the phases of the cycle the CEG explored the data collated through the teaching team focus groups to explore what staff felt should be in a departmental applied research strategy.

The CEG members collected data through their teaching teams as focus groups. The initial analysis appeared to reveal that the department had a strong cultural norm of teaching and staff saw themselves as teachers and felt teaching should take precedence over research. However the CEG felt this was a "*smoke screen*" (MN1) and the departmental resistance stemmed primarily from lack of confidence and research experience. This perspective dominated the analysis leading to the development departmental seminars as a way to demystify research and promote staff engagement with applied research. The seminars were offered as a way to increase staff confidence and engagement with research.

6.2.2. 1st CEG meeting (Stage 1)

The first meeting in April 2007 began with an air of uncertainty. I was not able to establish if those who had verbally agreed to be part of the CEG had returned the consent forms prior to the meeting due to an administrative error. I was relieved to discover four members at the first meeting although I hoped for more. After the meeting I found two further consent forms but those individuals did not send apologies and did not actually attend any of the further CEG meetings. The CEG agreed I would try and gain a few more members for the second meeting even though this could change the dynamic of the group. I sent out more invitations and reminders to four others who had expressed an interest in being part of the study

In the first meeting the CEG explored our understanding of what we felt was inhibiting research development within the department. The reflections

appeared to flow more freely when I didn't try and control the discussions but allowed them to take their own course. Where I tried to inject theory or formalise the reflective process into discussions it faltered. The use of a naturalistic approach in encouraging the participants to talk about their experience enabled rich data to emerge is well documented. Reason & Bradbury (2003) highlight the use of "*ordinary talk*" (p4), where people come together and share stories about their work which becomes inquiry. It allows rich data to emerge without any formal analysis. Although I attempted to let the discussions flow to generate rich data it was difficult to sustain the concept of '*ordinary talk*' since the inquiry group was also the heart of the analysis of the study.

At the start of the meeting I outlined the methodology of cooperative inquiry and the CEG briefly discussed the implications of a collaborative approach for the proposed project. The group appeared to be very positive about the study and there was an atmosphere of collegiality. Most felt the relationship of the CEG with the wider department would not be an issue as they were colleagues. However it was noted by the group that we were all very positive about research, which may not be shared by all colleagues. This was to prove to be an interesting tension as I looked back over the records as this (at times) set the CEG members apart from other staff in the department.

In the first meeting the CEG noted that staff had articulated they were actively discouraged from doing research. There was a strong cultural norm in the department to be a teacher and "*pressures to be involved in teaching*" (MN1). As one member of the CEG noted:

> *"People don't want to come out of their comfort zone of teaching because that's what they expect to do-teach* (MN1*)."*

On reflection it was interesting that despite the common experience of the priorities and pressures to teach within the department, this didn't feature in our analysis. Rather the CEG interpreted the business of teaching as a kind of "*smoke screen*" (MN1) to avoid engaging in research studies. The CEG consensus was that staff resistance to research was motivated by fear of engaging with research, which they had little experience or confidence. Once we had agreed this analysis, it was notable that the group did not explore other possible interpretations. Our discussion continued to support this analysis in a process of a self supporting agreement. The CEG felt that teaching was what people knew and were comfortable with. So doing research would take people out of their comfort zone of teaching and create fear. As one individual noted;

> "...a *very strong fear – a cultural norm to teach so it is fear – fear of doing something that was new and was not really what they thought was their job*" (MN1).

There was some acknowledgement people may not feel they had time to do research and so they would argue they would need to be released or "*bought out*" (MN1) of teaching. Yet the discussion concluded this could be "*another smoke screen*" (MN1) that staff were hiding behind as they felt insecure. The focus of the CEG strategy became how to give people confidence to reduce the resistance to research.

We discussed how to focus our efforts in collecting data and what we should ask the department staff. We felt there was a lot of fear due to lack of skills. Although we believed staff were good teachers, we felt they had little experience in research studies except perhaps as a result of higher degrees. Our first proposition emerged as we discussed felt like a hypothesis - "*staff don't engage in research because they lack the skills and understanding*" (MN1). Although this question was a logical progression from our discussion, the question could appear too personal and accusatory, which could create a

defensive response. So we decided that the first stage we would focus on the applied research strategy. It was less personal, which may allow the responses to be more open. So we agreed each member would go out and ask colleagues;

> "*...in developing an AR* [Applied Research] *strategy what would they like to see in it that would help and support their engagement with applied research?"* (MN1).

In keeping with a cooperative inquiry approach each member would collate the information through the focus groups generating their own questions. We agreed to have another meeting after a period of data collection to evaluate the development of our understanding.

6.2.2.3 Data analysis

At the end of this (and each meeting) the CEG drew together the main threads of the discussion and agreed by consensus the emerging codes. These were documented on a grid, which was populated with the data. As the CEG agreed the emerging codes and categories, which made that code, I wrote on the vertical axis. The source of the data was indicated along the horizontal axis so we could review our analysis and return to the source of the codes. We were not clear what the codes were likely to be at this early stage. There was some debate whether the fear of research was the main code or fear as a smokescreen to avoid research. The consensus was the 'Fear of research' would be the main code with the categories as:

- Fear of the unknown (research);

- Fear of coming out of the comfort zone (teaching);
- Fear through lack of research skills;
- Avoidance of research (Smokescreen of teaching);
- Cultural norms and pressures of teaching as an identity.

We recognised that the codes may change as we collated data but felt our initial analysis was an appropriate starting point.

6.2.3 2nd CEG Meeting (Phase 3)

The second formal meeting was seven weeks later in June 2007. At the meeting only one further person attended from those invited – Tim. Tim's attendance at the CEG caused an unexpected response. Instead of increasing the group, another member decided they could not continue to attend the meetings because of personal issues. We were sad at the loss of a member but respected their decision as the need to be ourselves and deciding to share together in openness and trust was the most radical part of the group dynamic. Habermas notion of "*communicative spaces*" (p 452, Godin et al 2007) was helpful as it suggests where;

> *"... people come together to explore problems and issues, always holding open the question of whether they will commit themselves to the authentic and binding work of mutual understanding and consensus."* (p100, Kemmis 2001)

This personal focus was a key to the development of the CEG. The aim was to provide to some tangible organisational benefits through communicative action. So if a member felt uncomfortable it could inhibit the group cohesion.

The meeting began with a brief review of our roles in cooperative research. This was helpful both for Tim as a new member but it also created a space to explore how we described our roles. Someone in the group suggested the CEG represented "*touchstones*" (MN2). This view suggested the group would help bring a reality to the development of the applied research strategy. We accepted the concept of a touchstone without exploring the implicit assumptions of taking on this role. On reflection, it raised some serious questions regarding the actual role we were playing and the bias we brought to the analysis.

The CEG role as touchstones was assumed but not clearly articulated. On reflection, our discussion revolved around the importance of the CEG in testing the validity of the data. The Oxford Dictionary (1998) defines a touchstone as "*a thing which serves to test the genuineness or value of anything*". The use of this metaphor suggested the members of the CEG (as touchstones) could determine the quality of truth of the study data since we represented and understood the department staff viewpoint. The group assumed they had had the intellectual measure and insight, as insider departmental colleagues, to test the validity or merit of the data. On reflection I questioned the legitimacy of this claim.

Retrospectively reviewing the composition of the CEG, I noted all of us had been doing some research. The early part of the discussion began with recognition of the hierarchy of research and the limited number of teachers of professional courses who became researchers. This discussion cast individuals into two distinct roles; those who are researchers and those who use research but are not researchers;

> "*We* [all staff in the department] *all include it* [research] *in our teaching but we are not all researchers*" (MN2).

Members of the CEG were all involved in research, which was a position that contrasted with most staff in the department who used secondary research in teaching but were not researchers. Our position moved us between insider-outsider roles (Towler 2011). This questions the legitimacy of our assertions as 'touchstones' as the group did not fully reflect the represent views of the department staff. The CEG were in the department by virtue of our teaching not part of the department as regards our interest in and engagement with research. Meyerson (2001) identified this position as "*tempered radicals*" (p5). These are individuals who use their differences to constantly pull in directions away from conformity to embrace challenge and creativity and change. We were challenging the status quo of the department but equally we were committed to the new prevailing emphasis of the wider institution for all teachers to be researchers. This was both an uncomfortable and difficult place to inhabit that could affect our influence in the change process. If we were perceived as radicals within the department we could be ignored. Yet if we were viewed as allies of the wider organisation, imposing another change to meet the research targets (albeit with the language of collaboration), this could provoke further resistance and we could still be ignored.

Fear et al (2006) suggests that if tempered radicals are to be successful they need to find a way to successfully navigate the organisation and bring about changes that are not marginalised. They enjoy the best of both worlds with "*affiliation without suffocation*" (p6, Fear et al 2006), which are part of the organisation but not subsumed in the prevailing culture. The CEG had affiliation as departmental colleagues but, our view of ourselves as researchers and touchstones could have communicated a message of authority that could have marginalised our position and affected the validity of the data from our colleagues. Perhaps more worryingly it coloured the analysis of the research data, which we did not appreciate at the time. This may help explain why our analysis made the assumption everyone would want to be researchers and the limited engagement was through lack of confidence due to the divorce between teaching and primary research. As one member noted:

> *"...to engage with research as the "big R" creates a divorce between teaching and research which is unhelpful as the research is then seen as distinct rather than an integral part of the role of a lecturer."* (MN2)

We acknowledged secondary research was part of a teaching role but primary research was not historically part of teaching. The teaching role was transferred into the university as part of the move of occupational professional courses into higher education since *"the move to HEI was a matter of geography rather than role changes".* (MN2) The CEG believed that if primary research was demystified it may be possible to reshape the teaching role to include primary research. On reflection, this appeared to gloss over the difficulties of changing an identity which was embedded into an occupational role. Ironically by simplifying the problem we were using a mechanistic management approach to problem solving that was mirrored the university target driven approach. How far the CEG had internalized this dominant organisational voice was difficult to untangle but our discussion appeared a simplistic and mechanistic approach to a complex problem.

The first part of the meeting was dominated by exploration of our own perspectives of the data rather than analysing collated data. We then turned our attention to the data collated from the focus groups. Yet not all members of the CEG had collated their team's information although most had set up meetings. Only Philip had met with his team. He shared the collated data using four questions he had a shared with his focus group:

(i) *Is there a real necessity for an applied research strategy?*
(ii) *What elements should be used in the strategy?*
(iii) *What resources would be essential or desirable?*
(iv) *In what ways could ownership be facilitated?* (MN2)

He had given out these questions on a handout and received written feedback. The written responses were not shared with the CEG as Philip's focus group had expressed a concern that their handwriting may be recognised. To preserve confidentiality he had reassured them he would not share the written feedback but relay the information verbally. This meant the focus group data was filtered by Philip's analysis and it was not always possible to identify who the person was or the occupational background of the quotes. Others in the group felt this respected the confidentiality and agreed they would use this technique for relaying data. In addition they agreed although the questions were helpful as a template they would use their own form questions that matched the questions used to collate data for the next meeting.

The feedback data could not be categorised neatly with the responses to the questions as many of the issues over lapped. However the questions provided a structure for the CEG discussion.

The response to "*Is there a real necessity for an applied research strategy?*" received a cautious 'yes' but with a caveat of some contradictory messages. Some indicated that they did not want to do research and stated they should be "*playing to our strengths* [teaching]" (FG1) whereas others acknowledging they would need to do it but not unless there was some "*protected time*" (FG1). It seemed teaching took priority:

> *"I don't have time….you get scholarly* [time] *booked out and then someone goes off sick and then its all hands to the pumps! You do your scholarly anytime, it's not important* [sic] *…."* (FG1)

This quote highlighted the organisational practice to give a potential allowance of 'scholarly time' (up to 25 days for full time staff or pro rata for part time staff) to all staff annually. Scholarly time can be taken for staff development which includes courses, publications or conference attendance. The CEG noted that this could be protected time, which could allow primary research to be

completed. This assumes it is possible to ensure that teaching doesn't take priority, which may not be possible. As one member of staff noted:

> *"...if someone goes off sick and a class needs to happen then you drop everything and just do it. Everything else can wait but students are not so forgiving."*(FG1)

The CEG debated how to protect scholarly time and provide 'backfill' (provide someone else to take on someone's teaching) to release staff from their teaching obligations particularly as some individuals had specialist knowledge. Giving sabbaticals for one team member per team per semester could be a possibility. This would provide a period of time which may be easier to protect, supported by the team to ensure it is not superseded by other priorities (including teaching) and cancelled.

As regards "*what elements should be used in the strategy?"* (FG1), perhaps unsurprisingly the respondents suggested, "*It needs to help us be motivated to do it"* (FG1). While this may seem self evident, it stressed the strategy needed to address what would be viewed as motivating for it to be research engagement to be successful. The staff emphasis was on *"gettable funding"* (FG1), time and support through mentorship and working together;

> *"...It needs primary funding and release time to make it work"* and a "*...need for mentorship to develop* [research] *skills and teamwork"*. A "*...collegiate approach is needed- we need to work together."* (FG1)

The prominence of using a collegiate approach was interesting but the CEG noted it had more synergy with teaching than primary research. Although researchers work as part of a team there is still an individual responsibility in the development of a research career profile. In contrast, teaching is organised and shared within teaching teams in the department. It was teaching which was

highly esteemed in response of staff to the question *"in what ways could ownership be facilitated?"* The focus group data indicated a strong teaching alignment. To re-align the staff towards research we realised that there was a *"need to be valuing research as equal to teaching"* (FG1) to try and focus individuals on the organisational objectives. This suggested we needed to use a teaching context to frame an applied research strategy to make the transition more palatable.

The CEG confirmed that, although they had not completed the focus groups, some informal discussions with their teams had resonance with what Phillip had discovered. It was a mixed message. Staff were willing to do the research but can't due to lack of time. They would do the research but who would replace them in the classroom? They would try, but didn't know how. The picture was complex but the consensus was that teachers appeared to lack confidence and avoided moving out of their comfort zone of teaching into a new area of practice. Simply providing time or funding would not result in the desired objective of staff using the time for research; the emphasis needed to be on developing staff confidence.

A comment by a member of the CEG team caused me to reflect on the process of change. They relayed how they felt when they came into higher education from practice as a neophyte teacher and how daunting it was. This resonated with some of the early research on the role of the nurse teacher that I shared with the group.

I highlighted the work of MacNeil (1997), which explored the tensions nurse teachers found when moving from practice to education. There was a loss of identity as they still perceived themselves as practitioners, and so they entered a kind of limbo until they were given a social status as teachers by colleagues. This rite of passage, around 'fitting in' and achieving the confidence and acceptance of colleagues to create a new internalised self image, caused us to ask what would help staff become socialised into a role that included doing

research. The data provided compelling evidence of a deeply embedded teaching identity. Interestingly, on reviewing the notes, it appeared that the CEG took a simplistic approach believing change could be ameliorated through mentorship and skills training. On reflection our approach, using training as part of the process, didn't address the deeply held values and beliefs of the staff within the department.

We noted our analysis was limited as we didn't have all of the team data. Other members of the CEG had organised meetings with their focus groups and so data would be provided at the next CEG meeting. We also agreed some in-depth interviews would help to explore what was needed in an applied research strategy and the perceived role of the teacher. I agreed to do the interviews since the other members were already collating data. I aimed to complete at least two interviews by the next meeting.

We agreed I would continue to keep in touch with the members of the CEG who had not attended, by providing meeting dates and the ongoing group outcomes. We would not attempt to send out any more invitations to join the CEG as there was some concern about disrupting the group cohesion. I also agreed to provide an update of the study to all other staff at the departmental meeting. The CEG agreed to meet again in four weeks to review the data.

6.2.3.2 Data Analysis

The CEG discussed the themes from the previous meeting and agreed there appeared to be a divorce between teaching and research. At this stage the evidence was limited but the data appeared to indicate teaching took precedence over any other activity including scholarly work and this had became imbedded as a cultural norm. The teaching culture was likely to reinforce teaching as a legitimate activity and not engaging with research would be equally legitimate since it was not valued in the same way as teaching. The

data pointed to teaching being highly valued but there were some disagreements whether teaching was an integral part of an identity or had became a "smokescreen" to avoid doing any other activity such as research. How far not engaging with research was due to pressures of teaching or a way to avoid research due to a lack of confidence and skills was not clear.

The codes and categories at this stage were agreed to be;

(1) Teaching first	(i) Teaching takes priority – no protected time
	(ii) Pressures to teach
(2) We are not researchers	(i) Lack of research confidence
	(ii) Lack of research skills
	(iii) Fear of research
(3) We are teachers	(i) We are teachers first
	(ii) We should be valuing teaching

The codes and sources of the data were mapped onto our data table (see table 5, p168-9).

A second level of analysis was reviewing the data in light of how it could inform the development of the applied research strategy. The CEG questioned how far we should play to the departmental strengths by incorporating a teaching culture as part of the strategy, but we did not agree on a way forward at this juncture. The CEG agreed the key areas that appeared to be emerging for the strategy were:

- Protect booked 'scholarly time' for research projects;
- Provide 'backfill' for teaching to release staff for research projects;
- Increase research confidence through training and mentorship.

Code	Category	Source	Source	Source
		FG1	MN1	MN2
Teaching first				
	Teaching takes priority – no protected time	"It needs primary funding and release time to make it work' "Meaningful buy out –not tokenism. A day is not enough when you have got all your teaching to do." " we need protected time as teaching comes first" "it needs gettable funding to give us time" "Do we need an AR strategy? 'A very positive yes but no only if time is not given."		"funding for backfill is needed " " research needs some protected time to make it work"
	Pressures to teach	"if you go off sick its all hands to the pumps. You can do your scholarly anytime it's not so important." "When someone off sick and a class needs to happen then you drop everything. Everything else can wait but students are not so forgiving"		

Table 5- Data analysis mapping

We are not researchers				
	Lack of research confidence	"..we are not all researchers"	"don't want to come out of comfort zone"	"It's a fear of the unkno
	Lack of research skills	"We need support… some kind of mentorship as we don't have the skills to do research." A collegiate approach is needed- we need to work together."	Staff lack research skills and need mentorship to build up skills."	" Staff need mentorshi training to develop rese skills"
	Fear of research	"Research is not something we do." "..we've done masters and such like but not really research."	"this is [fear] a smokescreen to avoid doing any research"	
We are teachers				
	We are teachers first	"..we all include it [research] in our teaching.. that's what we do. We are teachers." "It [research] needs a huge cultural change as we are teachers first"	"There is a cultural norm of 'doing' teaching" "being teachers that's what they are, that's what they do"	Distinct teaching/ resea roles unhelpful
	We should be valuing teaching	We should be valuing teaching as equal to research"		Should we be playing t staff strengths?" (teach

Table 5 - Data analysis mapping (continued)

6.2.4 3rd CEG meeting (Phase 4)

At the third meeting in July 2007, I received a number of apologies and group remained four members. I was disappointed at the low numbers and noted the apologies seemed to represent the problems of engaging staff in research related to teaching and assessment priorities. At the last meeting we had expected three more sets of focus group feedback, but in reality only Colin presented some raw data (anonymous except by occupational group). We received feedback from the staff meeting and two interview transcripts, one from a paramedic and one from a manager/nurse.

I was disappointed by the apparent lack of engagement with data collection but was encouraged by the enthusiastic analysis of those who attended the meeting. We took time to read the transcripts and review the focus group feedback and consider some of the emerging codes. We identified a number of key codes in the focus group. In the ensuing discussion we agreed by consensus that the main theme was lacking confidence in doing research. They seemed to be grouped under four areas: identity *(teachers first*); culture (*collegiate teaching and support*); time (*to do research*) and skills (*confidence and ability as researchers*) (MN3) (Diagram 1, p175). The early thrust of the analysis identified that the staff primary identity was firmly rooted in a teaching role:

> *"Why don't the University recognise us as teachers? It's as if what we do isn't important...".* (FG2)

> "*I'm paid to teach not do research. That's my job and I like to do it well and enjoy it*". (FG2)

We noted that the staff identified themselves as teachers, a sentiment that was articulated in the departmental meeting. The interview data also indicated a focus on a teaching role. As the nurse noted:

> *"... it's deciding about what we are about and fundamentally people come into teaching to teach. They don't come into teaching to do research and your teaching base. That's where I come from."* (T1, 15; 5)

Although the concept of a teaching identity was a feature of the data, the CEG suggested that the evidence of a teaching identity was merely a cover for the root of the problem – fear and lack of confidence. So the code of teaching identity became subsumed as a category of the main code – 'smokescreen' masking a fear of research. On reflection, this data appeared to provide a clear focus that the 'teacher identity' was a primary code but we were drawn to look for further evidence around the issue of confidence. The paramedic interview transcript seemed to support our analysis:

> *"...at the moment I am going to go to where I'm most comfortable* [teaching]*. If you take me out of that comfort zone I'd be like a bee on a lead...."* [sic] (T2, 15; 31)

The nurse/manager also felt embracing a research career was "*throwing the baby out with the bathwater*" (IT1, 26; 35) and would leave them without the protection of clinical practice or teaching as relevant and important job skills.

These transcripts appeared to indicate that the departmental staff were secure in a teaching role and so stepping out to develop research skills could leave them feeling vulnerable. Research was an unknown area of development, which may require leaving behind well tested teaching and practice skills. Interestingly, staff hid behind both teaching and also having no research skills. The manager/nurse suggested that staff hid behind incompetency to avoid being involved in research:

> *"..it's a strategy that some people employ by being absolutely rubbish at something or not appearing to be interested means they'll get left alone..."*(T1, 2; 23)

This suggested people pretended not to be interested, have poor skills or used teaching precedence as a way to avoid engaging with research. This further supported our proposition and we agreed this confirmed a "*cultural mind set"* (MN3). Research was still something staff were afraid of – *"the big R*" (MN3). Although talking about research in this way appears clichéd, the CEG believed the staff were fearful and lacked confidence because they believed that research was imbued with some mystery, which staff didn't fully understand.

The CEG agreed that teaching was an area of comfort; teaching was something staff knew how to do. There was no acknowledgement in the focus group or interview data regarding the use of the university justification of "*authority to teach*" (Marshall 2005) to integrate research into a teaching role. It is perhaps unsurprising that the departmental staff had not internalised the University maxim since they were primarily teachers that drew authority from their occupational expertise not primary research. Teaching was an extension of a career trajectory since they were employed to teach occupational practice. They were confident as teachers. As the two interviews revealed;

> "*Oh without doubt you are torn aren't you between your clinical practice ...and I think we undervalue our clinical practice to the extent we don't do it anymore and we become rusty and are out of currency very quickly."* (T1, 18; 27)

> "*I can deal with that* [practice related questions]*. I'm quite good at it because I do know my stuff before I go into class."* (T2, 11; 15)

Teaching was something staff felt comfortable with since they had developed expertise through a occupational career. Whereas, as the nurse/manager

suggested, research may engender feelings of fear through a lack of skill and confidence;

> *"...the feeling that they are not able to do it either because they don't have sufficient knowledge.... or they've had a bad experience of doing it."* (T1, 1; 36)

The emerging picture had been of staff feeling they had little time as teaching took priority, but this new analysis meant the CEG felt issues of funding and protected time were seen as side issues. Just providing time and funding would not address the real issue of fear, and teaching could still provide a way to avoid research. The CEG focused on providing a solution to the fear by changing the mindset. The aim was to provide opportunities for both demystifying research and developing research competence through a *"bite sized seminar programme"* (MN3). Margaret agreed to organise the timetable and we arranged to meet again in September.

The data was reframed into a main code of *'smokescreen'* (hiding behind teaching) with the categories as: *'teaching identity'*; *teaching culture*; *time* (to do research); *skills* (research and teaching). The data to support the categories became extensive and it was difficult to extrapolate an overview using the table format. As a way to visualise the codes and categories we developed a mind map (See Diagram 1, p175).

6.2.5 Summary

The data appeared to indicate that the staff identity was deeply rooted in teaching. However the CEG, rather than exploring a teaching identity, felt that the staff were using teaching as a cover for the root issue of fear and lack of research confidence. Teaching identity became subsumed into the code of a 'smokescreen', masking the fear and enabling the avoidance of research

engagement. The result was the CEG focused on developing a programme of research seminars as a way to improve research confidence.

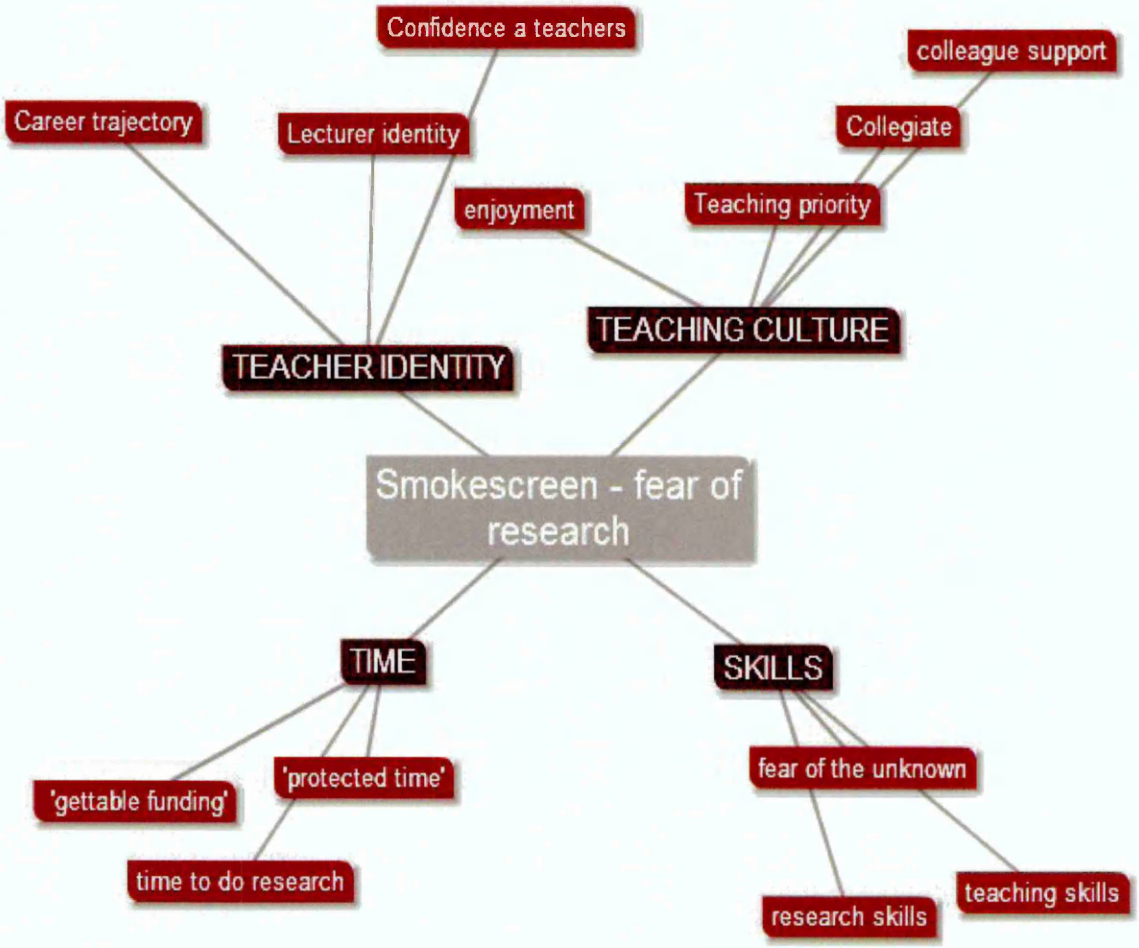


Diagram 1:
Initial mind-map of focus group data

6.3 Cycle 2 - Is this is what is needed in an applied research strategy?

6.3.1 Introduction

The second cycle continued from September 2007 to January 2008, which focused on what was needed within an applied research strategy. There was still an emphasis on providing seminars to boost research confidence despite the disappointingly low attendance (resulting in some sessions being cancelled). On reflection, the data clearly articulated an identity as a teacher, which was a socialised and imbedded role in the department. Although the CEG recognised the teacher identity, for a large part of the cycle they continued to give attention to the proposition that teaching was as a *'smoke screen'* that hid the real issue of lack of research confidence.

On reviewing the data it was possible to see that the CEG made sense of the data through their own perceptive lens. Recognising the bias in our analysis during the 2nd cycle helped to change our views. Instead of bringing our preconceived ideas to the data analysis, we allowed the data to generate the codes that were used to inform the departmental applied research strategy.

6.3.2 4th CEG meeting (Stage 1)

At the 4th meeting in September 2007 (I noted in my reflections post meeting) that the group debated in good humour and we achieved consensus despite some contentious issues being raised. Although we were a small group everyone participated and we had no uninvolved members, which Heron (1996) describes as "*passengers*" (p154). The group participation felt very liberating yet on re-reviewing the minutes they appeared to reflect an uncritical subjectivity which suggested our consensus was actually collusion. We seemed to look for data to support our own propositions rather than challenging our own thinking. I

wondered if we had inculcated the values of the organisation that suggested that the root of the problem of resistance to change was that the staff were unmotivated.

The meeting began by evaluating the research seminar programme. The research seminar attendance was patchy but the CEG felt that this was still the right approach as it was noted many couldn't attend but were interested. We acknowledged that perhaps the timing over the summer vacation was not ideal, due to holidays, though there was less teaching during this period. We agreed to offer a further series of seminars which would *"showcase celebration for ourselves"* (MN4) by presenting colleagues work.

Tim fed back from the adult emergency and paramedic team as Philip had done. He didn't provide written feedback but verbally reported the collated feedback from the team meeting. The team had explored questions around the applied research strategy. The effect on the analysis of providing a filtered summary of data in this way was difficult to evaluate, but we were unable to directly analyse the raw data.

Tim highlighted what were for him the two key issues; workload and identity. The feedback seemed to confirm that the workloads were prohibitive to engaging with research and he illustrated by this quote:

> "If *we have time then I'd like to do it* [research] *but I couldn't fit it in with my workload."* (FG3)

Tim believed, as did the other CEG members, this was still an excuse and that people had time. There was an agreement that individuals may book scholarly time but don't use the time for scholarly activity. The implication was that some individuals used scholarly time as a way to increase their holidays or use it for teaching and assessment activities. This view appeared to be anecdotal rather than based on evidence. In my reflective diary I wondered whether the

scholarly activity was a way to gain more space in full diaries rather than for real intended scholarly activities. It was agreed, by asking staff to provide some feedback on scholarly activity outcomes that may provide a way to understand how the time was utilised. The loss of scholarly activity time to teaching priorities had been articulated by staff in cycle 1, and it was recognised by the CEG that scholarly time for research may need to be protected, while acknowledging this practice had implications for teaching workload allocation and research avoidance.

The second issue highlighted in a quote by Tim was a teaching role and identity;

> *"It's not what I got this job for. I was appointed as a senior lecturer not a researcher, that's what my contract says so why should I do research? If I wanted to do research I wouldn't be a teacher..."* (FG3)

Tim highlighted that there was a strong message about not doing research for its own sake and ensuring funds were available for people to be released from teaching to do research. He emphasised that staff didn't see themselves as researchers, which appeared to confirm previous data, but he provided no verbatim quotes to support this view.

The CEG asked the question, '*what do teachers consider themselves to be?* We agreed they used titles such as teachers, lecturers, practitioners but not as academics. By academics we meant a research and teaching role. The titles reflected a culture of teaching, which would need to be altered at a deeper level so the notion of being a university academic would become part of their identity.

The CEG noted that teachers of professional occupational health care courses do not have a well established research profile (Carr 2007). Colin noted that research was not well established within occupational disciplines so it was likely

that staff had little research experience. Where profession specific research such as nursing had been successful in higher education, it was often led by other disciplines. He used examples from his experience in England to illustrate how psychologists led research within nursing departments. The discussion led on to even after being in higher education for more than ten years why occupational teachers still didn't engage with primary research. The consensus was the literature pointed to a lack of ability and experience with research amongst practitioners. The literature we drew on was more than twenty years old and we wondered why the picture had not appeared to have changed since many teachers have higher degrees which require research projects. The question of how much experience of empirical research do these courses provide created some debate. It appeared completing a Masters Degree may not prepare teachers to engage with research. The requirement of a Masters qualification for professional development may have affected the impact of the degree on research engagement. As the nurse/manager noted the Masters was a means to an end:

> *"...you want the award you don't want to do the empirical work and therefore the empirical work is a means to an end. So you choose the easiest way out and you choose something that isn't going to require you to fill in local ethics committee forms or go through ethics approval at all."* (T1, 4; 50)

Also a paramedic noted it was a different type of training which didn't prepare them for research:

> *"...and I done a dissertation and I researched my, my subject matter and everything like that but I wouldn't say I was confident in going away and doing it that was something to lead on. Nobody gave that sort of, sort of an input into that."* [sic] (T2, 5; 55)

The CEG noted that the interviewees suggested that it wasn't a higher degree that prepared staff to become involved with research, but a real involvement with a research project. As the nurse/manager commented:

> *"Until I engaged in doing research studies or small scale studies, and I haven't done a lot of them myself, I can honestly say I have learnt far more through doing that than I ever did doing a Masters programme."* (T1, 3; 53)

The CEG agreed that despite teachers having higher degrees they may not engage with research because they didn't feel skilled as researchers. This affirmed the need for research training. In discussing how to develop research skills, the CEG suggested that staff use course evaluations and gathering evidence for teaching evidence based practice which could be harnessed as a step towards doing research. This created significant disagreements about what was 'real' research and this highlighted a bias towards objective and statistical significant findings as 'real research'. We appeared to be rehearsing the arguments that have been played out between the quantitative and qualitative debates. Our aim was not to blur the boundaries between audit, evaluations and research but to help staff feel less intimidated by research, but we couldn't agree what was 'acceptable' as research.

The CEG consensus was a way to ease staff into research was in developing a supportive mentorship scheme, and in seminars, which demystified the process and provided insight into real projects. We then went on to extrapolate some codes from the data we had collated, which we felt could form the structure of a supportive applied research strategy.

We decided to use the words of the staff as away to construct the strategy. By using phrases from the focus groups and interviews it was hoped the strategy would show the staff their voice had been heard and improve engagement with the project. On reflection this may have been tokenistic. Using quotes may

appear to reflect the voice of the staff but the selection of the quotes by the CEG could equally obscure the underlying analysis and priorities of the co-inquirers. We began to outline a departmental applied research strategy that reflected the priorities (as the CEG understood them) coming through the data. This included:

(i) Creating a "*collegiate approach*" (FG1/MN4) to research by developing a supportive mentorship matrix to help people develop research. This was a departure from research careers which emphasised the individual skill (as part of a skill mix) as part of a study team. This could enable staff with limited experience or skills to be matched with a more experienced researcher as a 'buddy' to develop a study. This approach is more evident in developing a teaching career and would have resonance with staff having a safe peer model of support and allay some of the fears of failing.

(ii) Recognising people needed experience of small scale studies and putting in a bid to gain funding can be intimidating. We agreed some "*gettable funding*"" (MN4) from the department budget. A small fund that staff could apply for, which would be for studies based on clinical or teaching priorities. Applying for funding bids were seen as unattainable since many staff had limited or no experience in applying for funding from external sources. These opportunities seemed unobtainable as often successful bids demonstrated previous success in research. This was about giving staff confidence to apply for some funding to do research that had relevance for them and could be used to support a future bid application.

(iii) Providing *'protected time'* (FG1) by ring-fencing scholarly time for research studies. This would provide a step towards doing

research and provide thinking time to develop ideas rather than being consumed by teaching priorities. We proposed a block of time should be no more than four weeks. Although looking back I was unable to ascertain what prompted this figure except it was a suggestion to provide a set period of time to concentrate on a research study. The only specification was the study or activity would need to have agreed outcomes.

(iv) Avoiding *"research for research sake"* (MN4). Staff didn't want to engage in research that did not have relevance for their practice. We recognised this needed to incorporate scholarly activities, which were professionally relevant since staff didn't always want to do primary research studies. The strategy needed to reflect research as support for clinical practice or teaching to be of value. The applied research strategy of the university was broad and it was possible to enable the development of projects that could fit this definition and still be meeting the target of increasing staff engagement.

The strategy used a broad concept of scholarly work that included research. The CEG felt this approach could provide a doorway into a world of research, which the staff had resisted as they perceived that it had little relevance (as they saw it) for their work of teaching. Despite the developing view of scholarship as a way to develop research the CEG still felt much of the departmental resistance was due to not understanding research and so wanted to provide a forum to improve understanding and demystify research. Margaret and Colin agreed to set up an additional series of research seminars where staff would be invited to share their research as part of their academic courses.

I agreed to try and put together the first draft of the strategy. We agreed that the strategy would need to include: a clinical research focus; protected scholarly time for completing research studies; providing some departmental funding for

people to bid to gain some experience in research management skills; and mentors to support people in doing research studies. I arranged to circulate a draft strategy to the CEG for comments. In addition, I agreed to follow up with more interviews to ensure we had captured all of the issues before we next met in November.

6.2.4 5th CEG meeting (Stage 3)

The fifth meeting in November began with a recap of our progress. The applied research seminars had continued and Margaret had run three research sessions. Margaret and Colin had asked the staff that had completed empirical projects (for their degrees) to present their study, exploring the challenges of applying methodology to a project. The first two sessions had been attended by eight staff members and the minutes noted these as *"well attended"* (MN5). On reflection this evaluation was surprising since it was less than 10% of the staff from the department that included both Margaret and Colin. The CEG continued to see the attendance as a hopeful sign and it encouraged us to continue to offer more sessions.

We re-reviewed the first draft of the applied research strategy that had been presented as a part of a department meeting. The CEG felt the first draft was useful with language user friendly. I fed back some of my observations about the wider staff feedback. Those of us who had attended the departmental meeting felt that the meeting was less negative and felt encouraged. It appeared that the departmental staff articulated a concern about changes to their identity as teachers, which contrasted with the CEG analysis. The conclusions from the departmental staff were less about the strategy content and more about the proposed change of role.

I passed around copies of the transcripts of the two interviews I had completed and it was noted, as someone scan read the data, that 'teacher identity' was

captured in the transcript. We agreed that the transcripts would be a good starting point. In hindsight this was a departure from our usual approach except once at our third meeting, but even then we were looking for data to support our suppositions rather than letting the data lead us. Normally we reflected on our proposition and then explored the data. This time we examined the data (interviews and focus groups) and our discussion was led by what we found. It is not clear why we changed our mode of operation but the outcome changed our perspective. Instead of superimposing our own beliefs on the data we attempted to allow the ideas to be generated from the data. It provided a significant insight into an aspect of the data, that up until this point we had considered a secondary issue – teacher identity.

Trying to understand why we had spent so long dismissing a teacher identity is unclear. Yet, this should have not been surprising since as Taylor & Van Every (2000) suggested:

> "*Communication is a continuous process of adjustment in that, we all use our experience and "each participant provides material for the interpretative skills of the hearer to "fill in the gaps" – a world of shared experience is brought into being."* (p9).

The CEG consensus was that the staff lacked the skills to engage and were hiding so they would not have to undertake research. Reflecting on why we persisted in our analysis despite evidence to the contrary, I found some enlightenment through the sense-making in organisations by Weick (2009). As Wieck (2009) noted, any understanding of a situation is filtered by "*interpretation mindset*" (p12). The CEG 'mindset' appeared to be making connections with our existing collective understanding and sense making. Contradictory data was ignored and even data that had a weak connection to our proposition was treated as absolute confirmation of our analysis. This perspective has some comparability with the description by Weick (2009) of the

"*post-decision validation*" (p24). Organisations can lend themselves to multiple and sometimes conflicting interpretations of collective behaviour, and a way to reduce the confusion is through a group committed interpretation. A decision is identified and the group continues to validate the decision made (or in this case our understanding of the problem) by steering away from any data that increases uncertainty and shifting towards a position of unequivocally. This does not mean an action is fixed, it will still be subject to some minor revision, but the decision can set in motion responses or interpretation of responses, which confirms the mindset. Yet the CEG began to question our mindset when both the feedback from the departmental meeting and the transcripts seemed to corroborate one another and give prominence to the theme of identity.

The CEG took a little time to read the transcripts and then began to extrapolate the codes that appeared to be emerging. The overarching theme appeared to be the features of the staff teaching identity. These included: their teaching titles as "*lecturers not researchers"*; career pathway from practice "*to be teachers not researchers"*; teaching not research was valued "*research is not valued or intuitive in the same way that teaching or practice is*"; role conflict between teaching and research – "*can not serve two masters*" and the workload "*workload gave little creative thinking space to develop as researchers*" (MN5). We felt these issues reflected some real concerns about changing a role to be researchers, which they neither wanted nor were prepared for.

There was a change of direction by the CEG at this point since there was a concern that perhaps we had created a strategy that seemed to have, in part, reflected our concerns. We had heard what we wanted to hear despite attempts to use the data to lead the strategy. We began to recognise there was real identity issue that we had sidelined. We asked ourselves "*If we really listen - what would the strategy look like?"* (MN5)

The discussion was animated as we drew the ideas from the interviews and then explored what this meant for the applied research strategy. We began by exploring how individuals believed researcher and teacher roles were distinct. The staff had chosen to be teachers but didn't believe they had the skills or inclination to become researchers. The staff identified that although they used research findings in their teaching they felt a researcher was a different type of individual. It was teaching not research which motivated and gave them job satisfaction. As the paramedic noted:

> *"The process of putting together a teaching session and delivering that based on my own personal research of the literature etc, fine; great. I haven't got a problem with that whatsoever but the original research type concept really doesn't float my boat."* (T4, 37; 15)

We recognised this antipathy towards research had been expressed before but we saw this as a lack of confidence rather than identity. The identity as a teacher was linked with the reason people came into education. The difference between the two roles were not just about skills but seemed to be culturally embedded as an occupational practitioner. People had come into education to enable students to become professional practitioners in their field of practice. A teacher's career trajectory was from practice into education, using their own experience as practitioners to give their teaching credibility. As the nurse noted that the department was;

> *"...very culturally different, I think from here is where the primary identity comes from - professional groups."* (T3, 11; 21)

Professional occupational identity was a key issue since many of the staff had come from clinical practice. They had left clinical practice to become educators yet they still drew on their identity as occupational practitioners not as

educators. A nurse suggested that the way knowledge is generated had created a distinct culture:

> *"The paradigms of knowledge that different professions are drawing on and nursing is largely about intuition, tacit knowledge. It has a lot of nursing practice based on what the staff nurse told you to do, which she found helpful last week or the very least the sister on the next ward gets asked. That is historically how knowledge has been generated in nursing and that's part of the culture."* (T4, 9; 28)

This indicates knowledge within professions is not always evidence based and values intuition and experience, and for nursing in particular it is;

> *"..largely transferred experience rather than evidence based practice, and where you gets studies from nurses they often talk about this - made the patient feel better."* [sic] (MG5)

This quote highlights the debate regarding hierarchies of evidence from practice. Some practice may not always have a strong research base from a medical perspective (as it is not a random controlled trial) but it is used because it benefits patients. The CEG recognised primary research that did not appear to have a direct benefit to patient care may not be valued by staff. We acknowledged a occupational teaching role may attract a type of person who wants to make a difference to patient care and they may see research as a distraction from their primary role. Whilst secondary research is used in teaching, a large part of teaching is based on a range of evidence that is not always from research. This suggested we needed to provide a way to link the professional caring role with research.

Raising the status of research as 'authority to teach' could be seen both as the alienation of a occupational practice identity (that draws on experience and a

broad range of evidence) and the rejection of the teaching role, which draws credibility from occupational practice. The staff referred to themselves by occupational and educational titles not academic roles. It was a occupational identity that drew the departmental staff into an education career, which gave their teaching credibility not an academic or research identity. As a nurse noted:

> *"The lecturers here, in the main not all of them but in the main, are practical, come from a practical, clinical background and yes we're, we're well educated and we're academics but we don't have years of thinking, in research terms, behind us."* [sic] (T4, 6; 48)

The career pathways of researchers and teachers were seen as distinct. The CEG noted historically lone researchers carved out research careers in "*traditional red brick universities*" (MN5) rather than teaching. Staff saw themselves as teachers. Whether teaching and research require different skills was unknown. However there was a belief that research and teaching did require different skills and by trying to create individuals with research and teaching skills could dilute, not expand, an individual's capabilities. As a paramedic noted:

> *"There are some wonderful practitioners out there, wonderful lecturers out there and some wonderful researchers out there. But how much of a generic entity do we end up making before we spoil their capabilities?"* (T4, 1; 2; 45)

Although the quote implies there is a difference between a researcher and a teacher, it was not clear what the dichotomy was or is. The quote intimated that an occupational teaching route has not culturally embedded a primary research role. This caused the CEG to question the implicit assumptions that suggests teachers are able to become or want to be researchers, or that good teachers

make good researchers. We had accepted the concept uncritically and our approach had been to realign teachers into a research role. We now felt we needed to extrapolate the features of the teaching identity within the department if we were going to be able to create a meaningful departmental applied research strategy.

The CEG agreed meet to review the data again. Reviewing the data afresh may help us hear the voice of the staff and their teacher identity more clearly. Although the focus group details provided some insights, the data was already filtered by the person collecting the data prior to it being shared with group. Thus the data from the transcripts was considered the best source of data. The transcripts provided only a sample of the staff views but it was raw data. We agreed to meet once more in January to identify the codes within the research transcripts. In addition, I agreed to attempt to follow up on a few more interviews. It was hoped this additional data and analysis may further help to shape the applied research strategy.

6.3.5 6th CEG meeting (Stage 4)

The final meeting in early January 2008 concentrated on collating the codes within the interview transcripts. Only three members of the group met to review the data. One member who had agreed to attend was off sick on the day of the review. I had managed to gain one further interview from a nurse and provided the transcript together with the four others we had all seen previously.

We agreed as a way to reduce our preconceptions and mindset as a group we would all read the transcripts and then individually decide what we felt the codes were. We would then discuss our codes collectively. Through consensus we agreed the codes that represented a 'teacher identity', what the categories should be and what quotes would inform our analysis. It was this final stage that

enabled us to review the applied research strategy and amend it in the light of our findings. The codes and the implications for the applied research strategy are discussed more fully in chapter 7.

The final departmental applied research strategy received approval from the Dean. It was then circulated to the departmental staff at the end of January 2008.

6.4 Summary

The research cycles began with a view that teacher's didn't engage with research as they lacked confidence and used teaching as a smokescreen to avoid research. The cyclical learning and sense-making by the CEG revealed that there was evidence of link to a occupational identity as a caring practitioner that was transferred to education. The importance and recognition of the teacher/practitioner identity was a key part of the strategy development. However the perceptions and bias of the CEG threatened to completely overlook the notion of a teacher identity. The recognition by the CEG of our own bias enabled the values and beliefs of a teacher identity to begin to emerge from the data.

Chapter 7.0 – Findings; First Order Outcomes

7.1 Introduction

Chapter 7 chapter is the second part of the findings chapters and represents the 'first order outcomes' (research outcomes). By creating this division it can appear that the findings have more synergy with traditional thesis writing than a cooperative research account. This is not my intention. Rather my concern was to give the first order findings some prominence so they did not get subsumed into the learning-in-action outcomes.

The CEG met in an extended inquiry group meeting to review the interview transcripts. The aim was to extrapolate any quotes that emphasised applied research or a teaching role that could be used to determine common codes. Each quote was highlighted in our individual transcripts and then we shared our insights and agreed what codes emerged. While this consensus was in the spirit of a cooperative inquiry approach we were mindful, which at times, this deconstruction and reconstruction of the codes endangered the staff voice having authenticity. Our aim was to find a framework that would highlight the teaching and/or research identity of the teachers, which could be used to strengthen the voice of the teachers in the applied research strategy. In some ways this approach was a contradiction since we were using their words but reconstructing them to develop an applied research strategy that was an artificial creation. We recognised that the validity of the research findings could be strengthened by sharing interview data with the wider department, but this raised an issue of confidentiality.

In sharing the interview data it may be possible to attribute quotes to individuals despite the details of names in the transcripts being removed. We acknowledged that we could seek consent for the use of the transcript data but we questioned the appropriateness of this approach. The intention had been to

contextualise the findings in the applied research strategy rather than provide research outcomes that appeared to represent a 'traditional' research study. For us the test of the validity of the codes was secondary to the impact the analysis could have, through the acceptance and engagement of the applied research strategy.

To summarise the data, the CEG chose four phrases as a title, which had a number of elements that appeared to represent the transcript data, although at times the codes overlapped. These are:

1. Teacher not researcher;
2. Teaching as safe space;
3. Unable to be good at teaching and research;
4. Bringing occupational and scholarly experience.

Each of these codes will be discussed in this report using quotes from the transcripts to show how the codes developed and how the analysis informed the CEG understanding of a 'teacher identity'. Confidentiality was preserved in this report by deleting and substituting a number of stars (****) where a member of staff was named in the interview.

The research findings were not an end in themselves. The purpose of the analysis was to inform the departmental applied research strategy. Thus, the final part of chapter 7 will explore how the research outcomes informed the development of the strategy.

This chapter is presented as two parts:

(1) Part 1: The research outcomes;
(2) Part 2: Linking the research codes to the departmental applied research strategy.

7.2 Part 1: The research outcomes

7.3.1 Introduction

This section will explore each of the four core codes, and the categories that relate to each core code as part of a teacher identity. The section will utilise quotes from the interview transcripts not used in chapter 6. Other quotes previously used will be referred to, but not included again, where they could substantiate our analysis.

The approach draws on a grounded theory approach in generating the codes although the CEG made no claim for grounded theory. The categories at times overlapped across more than one core code. An example of an overlap was 'making a difference'. It could be linked to the category '*bringing occupational scholarly experience as authority to teach'* and '*being a teacher not researcher – distinct skills'*. Although the category could contribute to more than one code we chose to link each category to one main code for clarity. We used a kind of 'mind-map' to illustrate how each category contributes to the main code chosen (Diagram 3, p227). This allowed the CEG to visualize and discuss our choices and review how each of the codes and categories (that were part of the code) interconnected.

I have presented the discussion under the agreed codes as headings and then linked the categories' that represent that code. In this way it may be possible to understand how the data informed the emergence of the final departmental research strategy.

7.3.2 Code 1; Teacher not researcher

This code had constituent parts that were related to what made the two roles, of

a teacher and researcher, distinct. The transcripts revealed some categories that the CEG described as:

(1) Title – That's my role;
(2) Separate roles - Born researchers/born teachers;
Separate roles - Different skills;
(3) Enjoy different roles - Research and want to do it well
Enjoy different roles - Teaching and want to do it well.

7.3.3. Title – That's my role

In this study, when staff were asked how they perceived themselves, there was a tendency for staff to identify themselves as health professionals, teachers or lecturers, not researchers. Staff appeared to be comfortable with teaching; deriving satisfaction from feeling they were good as teachers but not confident about being researchers. This was not an unexpected finding as engaging in primary research was a new endeavour, and teaching not research was the motivation to enter education. Studies of nurse teachers seemed to suggest that occupational educators have identities as teachers or practitioners not research academics (McArthur-Rose 2008). Although these findings did not represent all occupational teachers, it offers an insight into some of the issues for teachers of courses leading to occupational registration.

McArthur-Rose (2008) noted the importance that nurse teachers gave to teaching may indicate very different career values. Equally in this study, the staff valued a role as a teacher contextualised in occupational practice:

> *"..if you looked at a role or a label, whatever you call yourself you see yourself as a teacher and research adding to that but not the thing you would want to do most of all."* (T2, 16; 47)

There is acknowledgement that the role could be changing, but their current view was as an occupational teacher not researcher:

> *"....while as it stands at the minute; the large part of my role is teaching, preparing students for practice or developing existing nurse's experience."* (T3, 0; 34)

Even where an interviewee acknowledged an academic role as a lecturer it was still contextualised in a occupational role – in this case nursing:

> *"I would say I was a university lecturer that would be my first response to you. I would say I'm a lecturer in nursing."*
> (T5, 2; 30)

McNamara (2008) suggested the development of an academic research role may cause nurse teachers to internalise this change as an erosion of teaching values, imbedded in a role that supported students and imparted occupational knowledge. This suggested that the emphasis as a teacher of occupational practice, not as a researcher may be an attempt to prevent the loss of a valued teacher role.

7.3.4 Separate roles – Born researcher/born teacher

What was interesting was the distinction the interviewees made between the roles as separate with different character traits for teachers and researchers. I have not attempted to separate these two categories as often teaching and research were used as a contrast to each other.

The roles of teacher and researcher were seen as distinct and innate. As one paramedic suggested:

> *"There are people I think who born teachers are and who are exceptionally proficient at it and the reason they are exceptionally proficient at it is it is an inherent quality within them. You can shape it, you can develop it, you can change it but it is basically an intrinsic quality and those people, I think, to make the assumption that they will automatically become good scientific researchers, I think is a linear parallel that is probably a little over ambitious shall we say."* [sic] (T4, 35; 07)

A nurse interviewee suggested there was a need to have specific skills to be a researcher. The example is drawn from Belbin's (1981) typography of team roles as 'completer – finisher' (someone who gives attention to detail);

> "*To be a good researcher I think you have to be a real completer-finisher. You may disagree with me as someone who is doing it but you have to be very methodical, and you have to dot your i's and cross your t's and frankly that's not my, I'm an overview, I'm a concept person.* (T3, 18; 15)

How far it is possible to claim distinct research skills and/or a natural aptitude (or it is another way to deflect scrutiny) is unclear. However by attempting to set out clear boundaries (real or imagined) raised a question about the way the CEG had accepted an untested assumption - that teachers could be researchers or that researchers have the skill or authority to teach.

The CEG had accepted the assumption that teachers could be researchers on face value. On reflection this did not address the differences in academic career paths. Credibility for occupational courses was not through research but clinical and scholarly activities linked to professional development. Whereas the message of the university was that research activities gave lecturers 'authority to teach'. This implied that it was research that gave teaching currency and credibility.

The concept of 'authority' is problematic within occupational education since the definition of 'authority' brings with it the notion of an expert who has knowledge in a subject who can be respected. The notion of research giving authority suggests that it is research adds weight or influence to the message presented. However it is not clear whether it's the ability to do research, having research skills that can be transferred to teaching, or the knowledge produced a result of the research that provides authority. The literature seems to give credence to all these approaches although it never clearly explains how this 'authority' is perceived by students generally (Nordkvelle 2006), or students occupational courses in particular. While research skills and knowledge have value, it is not a model that sits comfortably within occupational education. The aim is to develop students' critical thinking and distil research findings as evidence to justify clinical practice, and so enable students to develop as occupational practitioners.

For teachers of occupational courses, it is not personal primary research (although it may provide some context and skill) that provides teaching authority but occupational expertise. Professional bodies which validate courses leading to professional registration, require teachers to hold a current professional registration, teaching qualification and up to date knowledge in the field they are teaching. Recognising the tensions research as 'authority to teach' created for educators of occupational courses, raised the question amongst the co-inquirers, about the basis of such a widely held belief that research provided credibility for all teachers.

On writing this report I re-appraised the issue of authority to teach in the literature. I found little evidence to support the widely documented assertion that 'good researchers make good teachers' but a wide scale acceptance of its veracity (Nicholls 2001, Nordkvelle 2006). The concept of 'authority to teach' through research has been incorporated into the university aspirations and is reflected in its mission statements, strategies and targets. Yet there was no

clear justification in the university literature except an implicit message that researchers make credible teachers. There was an equally strong conviction amongst the departmental staff in this study that research and teaching were distinct. They believed research and teaching skills were not transferable between each role with a similar paucity of evidence or a clear rational explanation for this view. The staff believed that the university should not expect that all staff to be good at both teaching and research. An example by one interviewee made this point very clearly when comparing a clinician and management skills:

> *"...someone who is, using the word lightly, 'the expert', is so good because they make it look simple and that's what an expert does. You watch a clinician make something look simple and there's an automatic assumption because someone is clinically fantastic they are going to be a brilliant manager. So let's take him out of clinical practice and dump them into management where upon they flounder. There are some people who are wonderful managers but they are absolutely abysmal clinicians. You know, I think to try and make this multifaceted individual, there are some people who are quite amenable to that and some people who are quite capable of it. There are some people who have specific talents in specific areas."* [sic] *(T4, p10)*

In contrast to the university it was believed by the staff in this study, which some academics could be more suited to being either researchers or teachers. They suggested rather than everyone being researchers and teachers there should be an opportunity for each to excel at one, not both of the roles. As the interviewee stated:

> *"...there are individuals who are research inquisitive and who are first class researchers but alternatively are not the world's best*

teachers. I have to say personally speaking I think there is room for both sets within an academic environment." (T4, 35; 07)

An example to support the idea that some staff would be suited to research than teaching was suggested:

> *"I think there's probably one in particular that would sit more with tutoring than not but I would say that ***** is definitely into research and I think he sees his future there and I would say ***** is good for that as well so I think as a team we could do something."* [sic] (T2, 19; 34)

The CEG acknowledged that some teachers may be excellent teachers but may not want to, or are able to be equally good as researchers. Yet this view was not widely accepted within the organisation and instead the inclusive strategies and targets were aimed expecting all teachers to be researchers.

7.3.5 Separate roles - Different skills

The interviews indicated that there was a belief in a distinct teaching and research roles which drew on different skills. As a nurse indicated:

> *"I value my speciality and it's good to have time to share that and teach that sort of thing. Research I think is a separate thing; it does go hand in hand with being a teacher but also separate."* (T5, 31; 05)

However the CEG was unable to tease out from the interviews what were the distinct traits between a teacher and a researcher. Some of the interviewee's tried to articulate the differences but ended by stating they were there but they didn't know what they were. This quote from a nurse summarise the convoluted arguments trying to make a case for the difference:

"I don't think they are the same thing. I think there is..., I think there are common threads that runs through them but I also think in terms of being a pure academic role there are slightly different masters to satisfy as there are within the practice role, as the clinical role there are slightly different masters to supply. I think there are differences between them but it's very difficult to define the differences. It's like trying to define the differences between theory and practice. You know they are there but what are they?" (T3, 52; 35)

This view wasn't supported in one interview as the individual didn't see a distinction but suggested that the profession had created an artificial division:

"No they're [research and teaching] *part of the same thing. Nursing's not good at that. Nursing tends to separate them, both teaching and research and clinical practice."* (T3, 20; 01)

It was interesting that this quote (T3) came from a lecturer whose training had been through a degree route. This appeared to prepare them for a different world view, whereas the other interview candidates came through a career path where academic qualifications were secondary to occupational training. This observation raised the question regarding how occupational and academic progression affects attitudes and appreciation of research skills. Those who have come through a occupational training route to be teachers may very well consider adding research skills secondary as this research is new for them, a *"bolt-on to"* (T5, p9) (added to their existing skill set). They don't feel comfortable with the new research skills. As a paramedic commented:

"...unlike research, you can just go in and do it 'cos you're comfortable with it. But with research you just cant go in and

do it because you don't feel that comfortable with it 'cos you don't have that level of skill." [sic] (T2, 16; 47)

The CEG agreed that providing the link between research and teaching in the strategy would be challenging, given the prevailing beliefs about their distinct nature. Primary research was something new and discrete and how far the new research role affected the confidence or understanding of the skills involved (rather than both teaching and research having a divergent set of skills) was unclear. Perhaps, as one interviewee noted, research may be on a pedestal and seen as a high level skill:

"...what was really ironic, was that the academics saw the clinicians being fantastic because they were clinically up to date so you see they had this holy grail because they were practicing and similarly,... it appeared that's the clinicians saw the academics as walking on water because they could write essays, and they were learned. It almost made me giggle because the idea that each has what the other wants, and maybe research is quite similar in a way. That these people who can do research over here are somehow revered and up on a pedestal - they can walk on water because they understand p values and my God!" (T4, 1; 02; 13)

7.3.6 Enjoyed different roles – Want to do it well

We had not recognised the extent of the perceived differences between teachers and researchers. This suggested that merely emphasising a link between research and teaching may be a simplistic approach to a complex set of values. As one interviewee said (full quote previously used) research was not something that could *"float my boat"* (T4, 37; 15). Other staff in this study emphasised they liked teaching since this was their role. It is perhaps not

surprising that staff seemed to use teaching satisfaction to provide a justification to why they couldn't be researchers, since they viewed themselves as teachers not researchers. What was clear was that respondents didn't believe that research (for whatever reason) couldn't provide the same level of satisfaction.

The CEG noted that the sense of satisfaction staff expressed shouldn't be underestimated. Teaching was something enjoyable, they liked to teach, were good at and it was important. Whereas primary research was considered something they did not feel confident about and therefore unattractive. One interviewee went so far as to say research was tedious:

> *"...teaching-wise, I'm good at. I'm exceptionally good at it and it probably sounds terribly, terribly arrogant but I don't mean it to be. But I enjoy the process and I enjoy the sort of sub-research, if you like, that goes along with it but in terms of being a primary researcher I'm appalling at it because it fills me with abject boredom. It is the most tedious process in the world as far as I'm concerned."* [sic] (T2, 36; 19)

This seemed to indicate that for staff to engage with research it needed to be considered enjoyable in some way to gain wide acceptance. The strategy had to link research to teaching so that it had relevance and provided satisfaction. It was difficult to tease out what made teaching so enjoyable but there were some indicators that teaching was comfortable and 'safe'.

7.4 Code 2; Teaching as safe space

Teaching for the staff in this study was considered 'safe space' (psychologically and physically), where respondents felt protected and confident. The CEG described the constituent categories of this main code as:

(1) Teaching as a comfort zone
    - Fear of failing
    - Providing protection and esteem
(2) Making a difference

7.4.1 Teaching as a comfort zone

Staff in the study articulated they felt safe and confident in a 'comfort zone':

> "...so *then you stay in your comfort zone because when you're so busy you can almost do that without 'mithering* [colloquialism]*' about it."* (T2, 16; 18)

It was a role staff were skilled at, and having that level of skill developed as part of a teaching culture instilled confidence as a nurse indicated;

> *"...I think its partly a skill, its partly about making people feeling more confident, but its not the only skill, it is all about this cultural thing and teaching is a bit like nursing you know."* (T3, 44; 19)

Individuals felt comfortable with teaching whereas research is a new skill that takes people out of their comfort zone. Teaching was a skill they had developed and felt comfortable with and staff could just "*can go in and do it"* (T2, 16.47) (full quote previously used). Whereas research skills would require time to develop confidence. The CEG also noted that teaching may leave no space for the reflection and creativity needed to engage with research. While this linked with the notion of 'protected time' the issue was more complex and appeared to be part of a need to feel competent and avoid failing.

7.4.2 Fear of failing

To engage with research staff were required to leave a comfort zone which could raise anxieties. As the nurse manager noted;

> *" ..its is more comfortable to do the things you know how to do than to engage in things that you are either fearful of, haven't tried before, or need some support with because admitting that you need support means you are failing, and for a lot of people that's another reason why they don't engage because it's the fear of failing. It's a big thing to be failing."* (T1, 3; 21)

No other interviewee expressed it in this way although other staff in the focus groups had talked about lacking confidence and research skills. The CEG began to wonder whether suggesting where staff in this study had indicated that teaching provided a comfort zone as a 'safe space', it was an implicit reference to the fear of failing. Staff felt they were competent teachers and had 'authority' because of their occupational expertise but moving into research would require the learning of new skills and a willingness to show that you did not understand something. The CEG realised our approach to improve confidence through the provision of peer support and mentors was naively simplistic since the need to be confident went to the heart of a teacher identity. The role of the teacher encourages confidence in the level of your occupational understanding when teaching students. Staff had been cultivating occupational confidence through their occupational career, which suggested confidence was more deeply rooted in a occupational identity.

7.4.3 Space for protection and esteem

It appeared that the act of teaching created a sense of being safe (physically and psychologically). As one nurse stated;

"..when I'm teaching you know I just, it's as if you are removed from everything else. You are not in your office anymore, you're not being, you know phone called, you are just there and no one can bother you. It's your protected space and no one can get you in there as far as I am concerned. You are talking about your subject; you are imparting your knowledge." (T5, 33; 58)

This was an unexpected new finding. The CEG had not heard it expressed in this way before but there was a sense that as a teacher you have a place where you have autonomy, not responding to any other demands, where your role is of value – to impart your knowledge. The reference to boundaries has echoes of Bernstein's concepts of the sacred and profane. Sacred is considered something that is set apart (Oxford English dictionary 1998) and this protected space is almost something set apart and highly valued. The place where teachers are alone with their students had echoes of a sacred place. This teaching space is where individuals felt comfortable, safe, and where they know the job and have confidence.

7.4.4 Making a difference

It appeared that the confidence teachers derived from teaching was not simply about skills learned whilst being a teacher but it was a continuation of a clinical occupational role;

"...it's deciding about what we are about and fundamentally people come into teaching to teach. They don't come into teaching to do research and if you believe that we are here to teach then whatever you do in your working life should be about contributing to the development of that teaching knowledge and your teaching base. That's where I come from." (T1, 16.08)

Staff came into education to be teachers and not researchers. It appeared to be building on the confidence of a clinical career, which suggests the teaching role is integrated into an occupational identity. As one interviewee noted;

> *"...my experience over, at over 12 years in practice I was in a position now to use that effectively, to use that as an educator. To make a difference to, you know, to.. of some of the nurses that we produce."* [sic] (T5, 10; 14)

Staff wanted to be good teachers and 'make a difference'. This was not just about teaching but shaping students to make a difference to the clients they cared for. As teaching was part of an occupational career and staff could no longer provide clinical care so they used teaching as a kind of 'care by proxy'. Care was integral to a clinical career and had been incorporated into a teaching identity as a way to continue to make a difference. As one interviewee noted;

> *"And now because I'm not making difference clinically any more, then I can still make a difference as a teacher to the nursing students we produce but I can also make a difference in terms of what I find out and what I present through research and that's going to make a difference to peoples lives as well I hope."* (T5, 32; 50)

The CEG recognised that the link of teaching with a career trajectory of a health occupational role was more than a token gesture of providing opportunities for clinical research; it was about building a confident researcher within a professional identity.

7. 5 Code 3; Unable to be good at both teaching and research

This section explores the code that staff in this study believed that to be good at

teaching you needed to put all your energies into it. This suggested that you couldn't be good at teaching and expect to be good at research. Teachers would not be able to meet the additional expectations of adding research to their already busy teaching role, which also created competing priorities and role conflict.

The categories of this main code are:

(1) Focus on – Teaching;
- Research;

(2) Can't be good at everything;

(3) Resolving role conflict – Teacher or researcher?

The staff in this study seemed to believe that to be good at teaching you needed to focus all your energies into teaching, drawing credibility which came from occupational practice. The CEG agreed that simply asking staff to do research would be seen as another burden. Staff would feel unable to meet the expectations to be good at all of the roles. As a paramedic noted:

> *"Oh without a doubt because I suppose you're torn aren't you between your clinical practice, your nursing and what you believe nursing is for and about, verses research and teaching in the classroom. I don't think everybody can be good at all three. "*
> (T1, 18; 08)

7.5.1. Focus on teaching

Focusing on the teaching role appeared to be a way to manage the conflict of competing priorities;

"... if you take into account annual leave, you take into account scholarly activity, and you take into account your teaching activity and responsibilities and equate that to a twelve month period, it doesn't leave an awful lot of time left.(T4, 17; 57)

There was an assumption that there was not enough time to do research:

"No, I was.. no, I mean I don't care what I do as long as I've got time to do it. And I don't mind giving up my own time to do things but there is a limit these days when I say hang on a minute, I need some of my own time as well. When I don't get time to open my own post because I'm busy doing like other stuff I say hang on a minute there's an issue here." [sic](T2, 5; 08)

How far the question of limited time to engage with research is an excuse, was difficult to unpick but a nurse highlighted that it is sometimes a decision about what to prioritise:

"…. You have eight hours a shift, you have to make decisions about what you are going to do with that resource of your time and you know that's a nursing skill. You can't extend it and that's what nurses want people to do is to give them more time that is ludicrous." (T3, 33; 36)

In attempting to understand the impact of changing the roles of teachers in higher education, it is important to recognise that the work is not simply research and teaching. The roles of the teacher in the literature (nurse-teacher in particular) presents a confusing picture of how the multifaceted roles of clinical practice, teaching and research were (Crotty 1998, Camiah 1998), and still are, enacted (McArthur Rose 2008). Interestingly the studies on the early integration with higher education found that the way teachers coped with the

new competing demands of higher education was to opt out of clinical roles and focus on teaching (for example Bedford et al 1993, White et al 1994, Lyons 1999).

In discussing the role of teachers as researchers, the CEG noted that primary research could be perceived as a further demand, which creates the need for choices about what to give your energy to. The desire to resist research may be affected by the need to manage the demands. This together with the realisation that giving time to research could be at the expense of a valued teaching role, created resistance to the change. As one interviewee asked;

> *"Is it that nurse academics want to teach well and therefore are protecting their teaching time to the exclusion of other activities?*
> (T3, 43; 41)

The CEG discussed the difficulties between the competing priorities of the teaching imperatives and research aspirations of the university. Research could be seen as another burden rather than integral to the teaching role. Teaching staff may either be unable through lack of time (as they perceive it), or unwilling to become researchers as they see teaching having more importance. Even where teachers want to engage in research projects it requires some prioritisation of research above teaching that could affect the attention that is given to the teaching role. As the departmental staff had stated they had a teaching workload that left little scope for additional roles. The effect could be a choice about how much attention should be given to research as part of that teaching role.

7.5.2 Focus on research

The CEG questioned how reasonable it was to ask everyone to be a researcher or should we enable differing roles that either gave priority to teaching or to

research? Respondents suggested that an option was to have different roles as either a teacher or a researcher as research was not a role for everyone. As a nurse noted:

> *"I think what will happen is it will become elite and there will be a small group of people who will move research forward in a big way and the rest of the group will kind of plod on."* (T1, 24; 20)

Having individuals whose role was to be a researcher's offered a way to mange the competing priorities of teaching and research:

> *"..the other thing that moves it on for me is about having dedicated research people here in the Department and I've spent my life battling with ***** over you'll never get true research in any department until you put people in place who are dedicated to doing that and nothing else."* [sic] (T2, p3)

Whereas attempting to create a single academic research teaching role could lead to role conflict:

> *"I think its very much about if there are people who I see as predominantly researchers then maybe their calendars should reflect that and maybe the people who are predominantly teachers their calendars reflect that. But I think at the moment if we are trying to make this generic entity there is a danger that you may end up with people with quite protracted role conflict who don't know really whether they are a researcher, a lecturer or what they are."* (T4, p16)

This seemed to suggest that a way to meet targets, minimise the competing demands and so prevent any role conflict, was to concentrate some roles as

either a teacher or a researcher. Yet the university had taken an inclusive approach to raising the status of research. So the CEG felt it was unlikely to endorse separate roles as part of a change strategy. This highlighted a fundamental issue about the purpose of the applied research strategy. Although our intention was to produce a document, which represented a meaningful strategy for staff that represented their views, in reality we were constrained by the political agenda of the organisation. This questioned the motivations and reality of the cooperative inquiry approach to facilitate a collaborative change. Recognising the dilemma (but needing to propose a pragmatic solution that would have organisational endorsement) we agreed that we needed to make the engagement with research more palatable for teachers. This could be by emphasising a teaching role while still exploring how to address the university research aspirations

7.6 Code 4; Bringing occupational and scholarly experience

This section highlights that an occupational teaching role provides safe, effective and quality care. Credibility is drawn from occupational clinical qualifications, experience and scholarly development. Knowledge may include primary research but largely involves a scholarly appraisal of evidence drawn from a variety of secondary research findings, professional and government guidelines, and national policy.

The two categories which emerged from the transcripts are;

(1) Drawing on a range of expertise for teaching credibility
(2) Using secondary research to inform teaching

7.6.1 Drawing on a range of expertise for teaching credibility

Staff in this study did not draw credibility from primary research but from occupational practice. The role of the occupational teacher is not about being a researcher, but having knowledge of research to teach students to use critical skills in evaluating evidence for occupational practice. As one interviewee paramedic noted:

> *"It's the thing that yeah we'll, we'll teach students to examine and critically appraise the literature that's out there but when they get into practice the process will be very much surrounded by yeah I know what it says in all the literature and what it says in all the research but, that's what you do those are your guidelines those are what you will operate within?"* [sic] (T4, 27; 04)

Occupational practice has to operate within guidelines and policies to guide patient care, but these are not always supported by research evidence. As an interviewee nurse/manager recognised:

> *"....paramedics have been using the medical model. The guidelines for drug administration are medical model. It is written by medics. The ambulance service is run by medics it is inevitable that will happen, therefore they follow the scientific route of proof whereas nurses I think we don't need to have proof to know what we are doing is good..... We're on the nurturing, caring side of things and therefore the qualitative stuff is much more important to us. Number crunching doesn't do much for us because it only proves it works. So what! Is the patient happy?"* (T1, 11; 17)

The quotes were illustrating that occupational practice draws on a number of sources of knowledge including clinical experience:

".....you also need to think about the paradigms of knowledge that different professions are drawing on and nursing is largely about intuition, tacit knowledge. It has not, a lot of nursing practice based on what the staff nurse told you to do that she found helpful last week or the very least the sister on the next ward gets asked. That is historically how knowledge has been generated in nursing and that's part of the culture I am talking about." (T3, 9; 28)

The CEG began to recognise that the emphasis on primary research, providing credibility for occupational practitioners, may not be in the best interests of the teachers or the students. Occupational education aims to assist students to develop the skills of critical appraisal to provide quality care to clients.

7.6.2 Using secondary research sources to inform teaching

The CEG noted that the expected and valued role of nurse educators was, as teachers, to develop and transmit occupational values not as research academics. It is not that the teachers reject research as they use research to inform practice. As one interviewee noted:

"I think if you look at most teachers, most teachers, good teachers at most adept at secondary research. It is looking at other people's views and opinions to formulate a balanced argument to present to a group of students to enable some degree of learning to take place." (T4, 37; 49)

Some of the following quotes provided compelling evidence of this view:

"..I still use research in articles to discuss them in sessions because research is an important part of critical care you know

in terms of what is happening and I always have current research in my teaching." (T5, 9; 02)

"...there is a certain amount of researching, if you like, searching in the sense of looking for information but there's also a lot of appraising what is quality research and what isn't, making judgements about what do I, what do I teach on what do I not teach on. I think that's quite a nursing, that's kind of a huge amount of a way nurses use research is that, and it's an important role to use research that has already been done." (T3, 1; 08)

"...more from a teaching perspective is what I see my role as, being aware of both reviewing and appraising the research that somebody else has done and making sure that, that's what gets taught so that the people use it." [sic] (T3, 2; 12)

Up to this point we had not analysed of the relevance of teachers undertaking primary research to provide credibility for occupational education. The research findings caused us to reflect on our approach in presenting the message that teachers needed to be researchers for credibility, and what was meant by 'authority to teach'. For occupational teachers credibility was based on occupational expertise and ongoing scholarly development that may include but was not primarily research. This led us to review the notion of accepting that research provided credibility for occupational teachers.

In the discussion the CEG realised that the project findings indicated a clear 'teacher identity' which was supported and developed through scholarly activities. Although the scholarly activities included post graduate professional courses that required the production of a research project, staff did not see the research as relevant to their teaching as they had not completed a 'real' research project. The belief that research and teaching were distinct roles

meant research was not seen as relevant to teaching. The CEG realised that if we were to create a cultural change we needed to find a way to make research relevant.

Using a professional model of scholarship appeared to be a way to help the occupational teachers accept that research had relevance for their practice. We began to consider what scholarship was and whether it was possible to include a broader concept of scholarship in the departmental strategy, which integrated research, for occupational teachers in higher education.

7.7 Scholarship as a model for 'authority to teach'

All occupational teachers of occupational courses need to maintain a portfolio of evidence of scholarly development and reflection, to ensure they can continue to practice as an occupational teacher. The portfolio of evidence draws from a variety of occupational developmental activities that includes: continued teaching; training; academic qualifications; conference attendance; publications; project development and applied research. Using occupational scholarly development as a way to facilitate credibility for occupational teachers raised some interesting issues since it draws on a broader range of evidence than the narrow university approach based on primary research. The CEG recognised that if scholarly development could be integrated into the departmental applied research strategy, the strategy needed to become more palatable for staff. A scholarly model may be a way to move the department towards the organisational research targets. Rather than expecting teachers to become researchers, the aim would be to recognise the concept of 'authority to teach' through a scholarly approach as a way to give credibility to teachers. However this approach had the potential to marginalise the department, as it could appear to be not 'on message' with regard to gaining teaching credibility through research

broaden and imbed scholarly research activities within the context of teaching and occupational practice.

Our approach represented an opportunity for the department, but it could also be perceived as a threat to the organisations target driven strategy. Unless the approach proposed had some synergy (however tentative) with the objectives and language of research it would be unlikely to gain endorsement by the organisation. The organisation may see any attempt to broaden the scope of applied research activities as limiting contributions to the REF. However if we were able to show how our scholarly approach provided a step change towards REF it may receive endorsement. The departmental applied research strategy was not without some risk and could still be rejected if the approach did not move the department towards meeting the Faculty targets.

In the CEG discussions it was noted, that in one sense, that the development of a scholarly model was pragmatic but subversive. Subversive as it was presenting a message of research as scholarship in two ways; (1) for the university: we reflected the language of research and research targets as part of scholarship. (2) For the departmental staff: we included research in its broadest sense that included, but was not exclusively, primary research. This was so that the strategy would be seen to have value for occupational development and education. In doing this, the departmental applied research strategy would have acceptance and relevance for departmental staff and still come some way to meet the university targets by creating engagement and the possibility of some REF outputs in the longer term.

7.8 The 'Scholarship Model'

The 'Scholarship Model' (Diagram 2, p221) was developed to imbed teaching and research into a unified academic framework, which had relevance for occupational teachers. We drew on the notion knowledge development, to

define our model, as it represented the creative scholarly work that is measured by the ability to think, learn and communicate ideas (Elton 2005). Scholarship, for occupational educators, is the knowledge which informs theory and practice. Using a model that explores knowledge development that incorporates teaching and research into a cohesive structure, made it possible to show how both elements are integrated not separate. In this way the debate which created a silo mentality, became redundant.

The co-inquirers didn't write a definition of scholarship, but for the purpose of this report I have drawn the threads of the discussion from our meeting notes to offer a definition as;

> *"Activities that academics engage in to investigate and integrate theory and practice, which is informed by the principles of discovery, integration, application and dissemination of knowledge."*

The 'Scholarship Model' represents activities that academics engage in to create knowledge, which illustrates the interrelationship between discovery (research) and dissemination (teaching). The model uses scholarly activities informed by the principles of discovery; integration; application and dissemination of knowledge to inform and develop teaching, clinical practice and research. The definition of each part of the model was agreed as:

(1) **Discovery** – asking questions and discovering new knowledge through a research project.
(2) **Integration** - bringing together a variety of sources of knowledge and reframing it to bring new insights.
(3) **Dissemination** – sharing knowledge with peers to initiate new insights through discussion and the generation of research questions.
(4) **Application** – using knowledge to inform practice

All of the stages of the model could relate to a variety of activities leading to scholarly outputs that include; a research project, literature reviews, conference papers or posters and publications. The knowledge framework provided a way to structure scholarship so that it had relevance for both occupational teachers and the university. The model incorporates the university concept of 'authority to teach' which suggests research (discovery) can lead to teaching (application), but also recognises an occupational teacher perspective that teaching is informed by scholarly development and research. The model incorporates both perspectives and provides a way to visualise scholarly development that begins with teaching through a pathway of scholarly developments to a research project, and then back to teaching.

It was envisaged that there were multiple entry and exit points, into and out of, the development of a scholarly profile. To provide an outline for how the model could be used we mapped two possible pathways for occupational teachers as exemplars. These began with either:

> (1) teaching that leads to the development of an occupational professional paper (dissemination): or a literature review (integration) that may lead to new questions to explore through research (discovery)
>
> or;
>
> (2) a research project as the result of a post graduate course with a research component (discovery), which could lead to a publication (integration), a conference paper (dissemination) and teaching (application).

The model implies a linear pathway of scholarly development, either from teaching to research or research to teaching, but we recognised a scholarly journey may not always be linear. It is possible for some individuals to use a variety of endeavours to build a scholarly profile without engaging in a research project. This meant that the development of some staff may not lead to

research, but the model engages occupational teachers to develop their knowledge through a scholarly profile, which includes teaching and may also include research.

7.9 Summary of part 1

This section represented the 'first order outcomes' (research codes) of this study. The concept of a teacher identity was both complex and deeply imbedded into the roles of the staff in the department. Teaching was a 'safe place' where individuals felt comfortable, safe, had autonomy and derived satisfaction. Teaching was not simply an academic role, but a continuation of a practitioner career trajectory which helped them, indirectly through teaching students, to continue to make a difference to patient care. This deeply rooted teacher identity drew credibility through clinical expertise, scholarly development and the use of secondary research. A 'Scholarship Model' was developed and imbedded into the departmental applied research strategy as a way to develop a scholarly culture that incorporated both an occupational 'teacher identity' and a university research perspective.

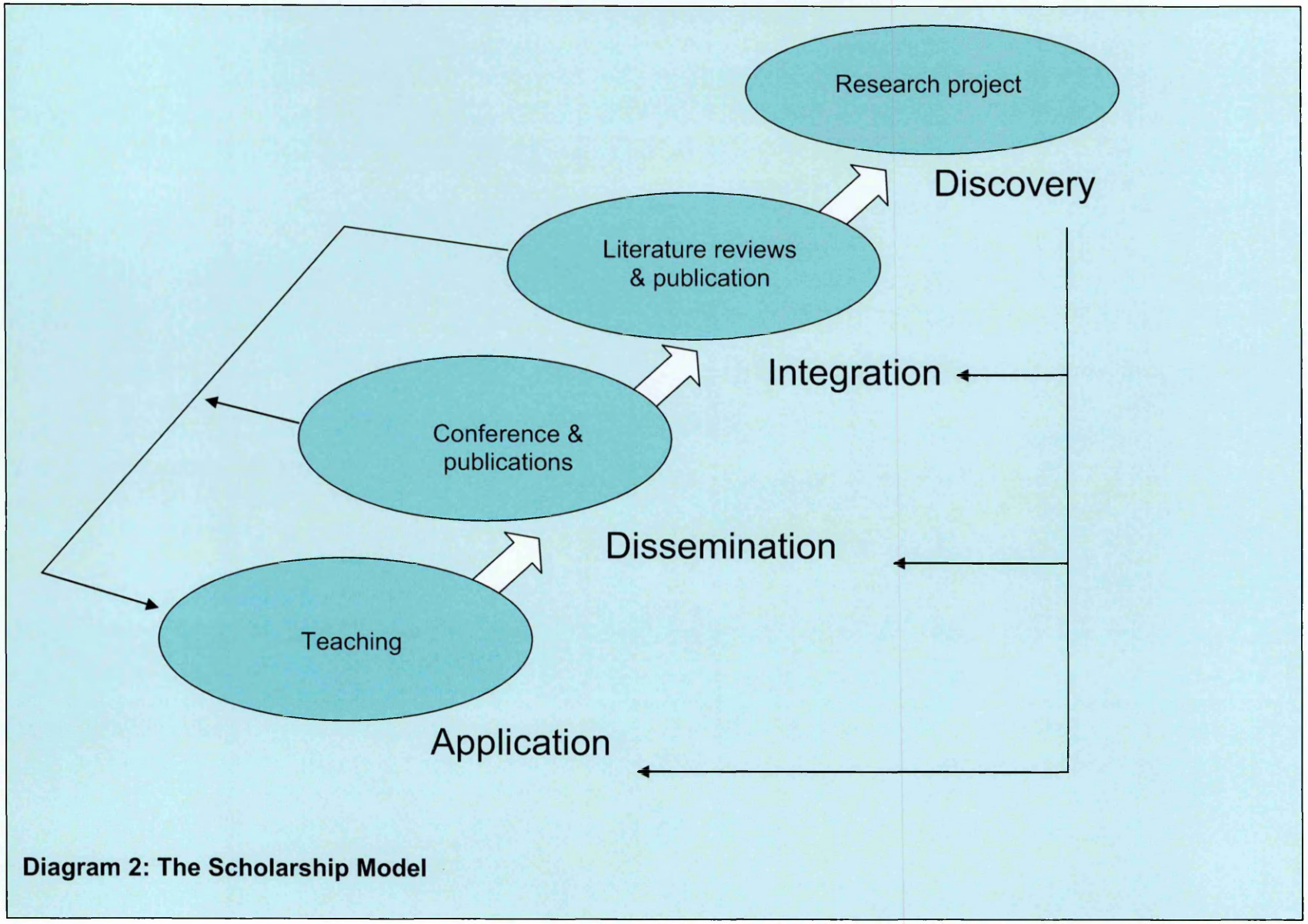


Diagram 2: The Scholarship Model

7.9 Part 2: Linking the research codes to the applied research strategy

7.9.1 Introduction

This section will show how the CEG utilised the research codes of a 'teacher identity' to further develop the departmental applied research strategy (Appendix 6). The aim was to use the emergent themes as a way to imbed the 'Scholarship Model' in the departmental research strategy. This could provide a way to enable teachers to begin to move towards developing a scholarly research profile. This approach was more likely to create change as the 'teacher identity' that had been a reason for the departmental resistance to research now became part of the strategy for change.

7.9.2 A Teacher not researcher – Distinct skills.

Despite the widely held belief of staff in this study that the skills of teachers and researchers were distinct, there was limited evidence provided to support this assertion. What was evident was that staff identity came from a teaching and occupational identity. The CEG recognised that to make the applied research strategy meaningful to the departmental staff we had to integrate research within a *"professional teaching role"* (p3). So we emphasised the opportunity research brought to enrich the education of students:

> "*...locating a teaching role in a research structure provides not only the possibility of developing clinical research; but also a unique opportunity to develop teaching practice and clinical practice that is linked to the education of students.*"
> (p, 296, The Department Applied Research Strategy 2008, Appendix 6).

The strategy still provided opportunities for departmental funding to develop pedagogical or clinical projects which linked to the original concept of '*gettable funding'*. The revised draft gave greater emphasis to the occupational and teaching roles, and opportunities through specified department projects.

7.9.3 Teaching as 'safe space'

The staff in the study indicated that they derived satisfaction from teaching. Although it was difficult to tease out what fully contributed to this sense of satisfaction, a significant issue for staff was that the teaching gave them confidence and the classroom was 'safe space'. It was where individuals had autonomy, felt comfortable safe, and where they knew the job and were competent.

To develop competence so that staff felt confident and safe as researchers, the co-inquiry group recognised that mentor support was still a key element of the applied research strategy. Our approach to improve confidence through the provision of peer support and mentors was naively simplistic. The CEG recognised that the link of teaching with a career trajectory of a health occupational role was more than a token gesture of providing opportunities, but also building a confident researcher within a professional identity. We had already articulated a '*buddy system'* in the first draft of the strategy, but it was strengthened to be offered as part of the development of joint applications and project implementation:

> *"..may be applied for jointly, with the contributing members providing a diverse team of project/research expertise to sustain the implementation of a proposal."* (p 300, The Department Applied Research Strategy 2008, Appendix 6)

In addition we strengthened the model so that there was time to develop research competency. The CEG had already incorporated '*meaningful buy out*' into the first draft of the strategy, but we made this section stronger by including protected scholarly time. Examples were provided to show how blocks of time could be set aside and managed through a course team endeavour (p 345, The Department Applied Research Strategy 2008).

7.9.4 Unable to be good at both teaching and research

The staff in this study articulated a strong belief that to be good at teaching you needed to put all your energies into teaching. Putting energies into a teaching role could be a way to manage the conflict of competing priorities by opting out of research and focusing on teaching. The CEG agreed that simply asking staff to do research would be seen as another burden and staff were likely to prioritise teaching to meet the expectations of the two roles.

The suggestion by staff to have one role as a teacher or a researcher seemed to suggest a way to meet targets, minimise the competing demands and so prevent any role conflict. Yet, it is not something we could endorse since the university strategy used an inclusive research strategy. We realised that we would need to develop a departmental approach which addressed the need to reduce the role conflict and explore how research could be seen as part of a teaching role. This linked with our broader view of research by encouraging scholarly activities through a 'Scholarship Model' which would have an impact on a teaching role. The scholarly activities wouldn't directly meet the university agenda, but could be a step towards a cultural acceptance of a changing role.

7.9.5 Bringing professional and clinical experience as 'authority to teach'

The CEG noted that teachers came from a career pathway that based their

'authority to teach' on scholarship as professionals to give their teaching credibility. This provided a perspective of teaching credibility, which was in contrast to the university. The challenge for the CEG was to develop a model that incorporated 'authority to teach' from an occupational education perspective.

The broad definition of applied research, used by the university, provided a way to incorporate scholarly activities (literature searching, pedagogical evaluations or audits) into the departmental applied research strategy. It was a way to adopt a occupational scholarly research perspective through a:

> *"...broader perspective of applied research as scholarly activities within the department. This includes ways to support the development of teaching and clinical projects that can contribute to our scholarly outputs and research profile".* (p 300 The Department Applied Research Strategy 2008, Appendix 6)

The strategy was located in a teaching role in a broad scholarly research structure. This also provided a unique opportunity to develop a teacher's profile through: teaching, the education of students, and clinical practice to the strategy. This could lead to scholarly and potential research outputs.

The development of 'Scholarship Model' that linked occupational practice with research was significant in the development of the departmental applied research strategy. The strategy, with the model imbedded in it, was more likely to affect change in the department as the teacher identity, which had been a reason to resist change, was now part of the strategy for change.

7.9.6 Summary

The importance of broadening the scope of applied research to include a model

of scholarship was a significant component in redrafting and gaining staff acceptance of the departmental research strategy. This approach was more likely to affect change as the teacher identity which had been a reason to resist change was now part of the strategy for change. The development of the strategy was not simply the incorporation of the cooperative inquiry outcomes, as it needed to address the organisational research aspirations. Endorsement was achieved as the strategy, although not specifically about research outputs, created a step towards a research profile.

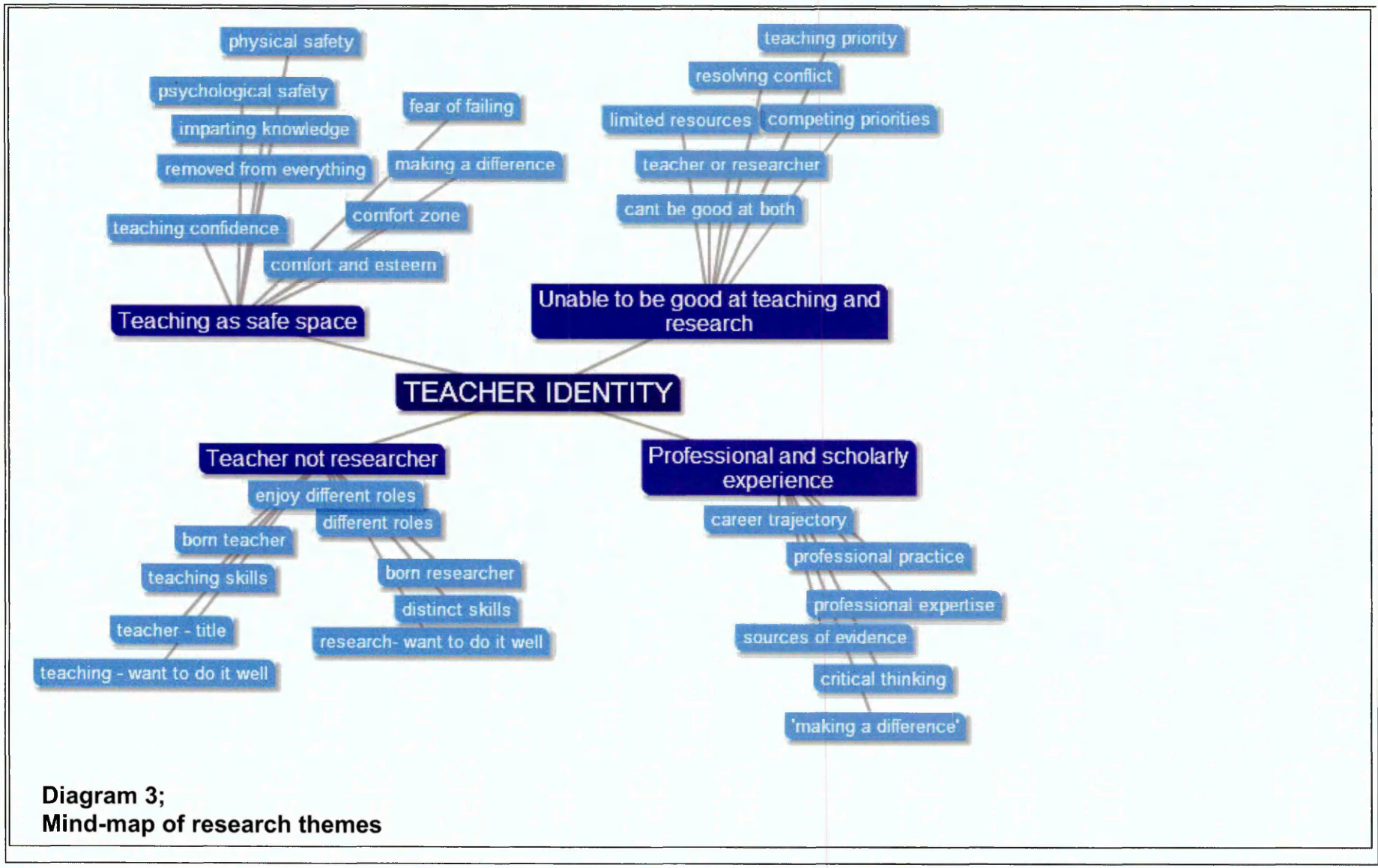


Diagram 3;
Mind-map of research themes

PART 3

Introduction to Reflections and Conclusions

Part 3 attempts to draw the threads of the inquiry together using: a personal reflection on the journey; a summary of the inquiry and relevance of the findings beyond the local setting. Part 3 is divided into three chapters;

(1) Chapter 8 - A Personal Journey;

Chapter 8 explores my reflections inquiry as a result of writing up the report. The discussion is structured around: the overlap between cooperative inquiry and action learning; the validity of using cooperative inquiry in a hierarchical organisation; and authority to teach in higher education.

(2) Chapter 9 - A Summary of the Inquiry Developments and Findings;

Chapter 9 is a summary of the developments and findings of the inquiry that leads into the concluding comments of chapter 10.

(3) Chapter 10 - Concluding Comments and Wider Relevance of the Study;

Chapter 10 explores the wider implications of the inquiry around three main areas: the use of cooperative inquiry for organisational change; teaching and research role in higher education; and the model of scholarship as credibility for occupational teaching.

Chapter 8.0 – A Personal Journey

8.1 Introduction

This chapter explores some of my learning during the cooperative inquiry project, and as a result of writing up the report. The journey has been significant for me, not only because of what I discovered along the way, but because it has transformed the way I see myself as a manager. The inquiry touched on some deeply held values regarding my management approach and my understanding of change. It would be unrealistic to say I have altered my behaviour fully, but maybe I am more able to recognise some of the effects of organisational problem solving, and at times mechanistic assumptions, which have affect my behaviour and as a result not to be so driven by them.

This inquiry has had led to changes in my personal epistemology. I now feel more strongly grounded in understanding the world to be participative and inter-subjective in nature. The 'extended epistemology' of cooperative enquiry sees knowledge as emergent and contingent on context. Rather than taking the usual approach of a steering group to develop a strategy or policy which is familiar in most department settings, I now use a participative approach to challenge the department culture to engage with other changes. The cooperative enquiry process revealed some of the complex ways in which our analysis was affected by our interconnections with each other and the organisation. We are all interconnected, which means that I am not tempted to make claims based on a "*quasi objective' way of knowing*" (p 82, Park 2001). I would suggest instead that the process of learning is subjective, but has meaning for myself and those who participated in the inquiry.

The study has helped me expose some of the values imbedded in the organisational approaches to change that I took for granted. These include the nature of collaboration and cooperative inquiry and the validity of the assertion

that research provides 'authority to teach' for teachers in this inquiry. Although these issues have already been touched on within the findings of the report, my intention is to bring these threads together and use this section to explore them more thoroughly. The issues are complex, messy and overlap, but in an attempt to give this clarity I will use the following headings to structure the discussion:

(1) Exploring action research and action learning;
(2) Collaborative inquiry in a hierarchical organisation;
(3) 'Authority to teach'.

8.2 Exploring action research and action learning

In the process of developing this cooperative action research inquiry, I noted that the co-location of learning with action in the 'sense-making' process blurred the boundaries between the action and learning. Action learning, as in cooperative enquiry, co-locates action and learning and so specific actions are sometimes hard to differentiate from the learning process. I recognised that as my methodology developed there were some similarities with my project and action learning.

It is worth noting that a cooperative enquiry does not employ standard techniques, which can be applied to meet every need. As Mead (2002) suggested;

> *"...To realise this potential it* [collaborative inquiry] *must be crafted to its particular circumstances and context."* (p203, Mead 2002)

I would argue that this cooperative inquiry has used a variety of techniques including the co-location of action and learning in the sense-making processes. This accommodation could be viewed as the strength of the methodology of

cooperative inquiry, which provides opportunities to create an approach to meet the needs of the particular circumstances of this study. Equally this could be viewed as a licence to incorporate a variety of methods under the 'umbrella' title cooperative inquiry. This makes it difficult to identify the distinct characteristics of cooperative inquiry methodology in contrast to action learning as both have synergy in the use of a reflective approach.

Dick (2000) proposed that there are some differences between action learning and action research with regard to their application. Action learning is used within organisations for personal development, whereas cooperative inquiry is used to create change within teams, in community or educational settings (Marsick & O'Neil 1997). How far it is worth preserving a complete distinction between both action learning and cooperative enquiry is debatable, particularly as both use self in the learning development processes to solve organisational problems (Zuber-Skerritt 2002, Kramer 2008). Despite action learning sharing some features in common with cooperative inquiry, in practice action leaning is intentionally biased toward learning.

Traditionally action learning has been concerned with the 'how' rather than the 'what' of the learning process (Gosling & Aston 1994). That is not to imply that the content of the learning is not important in action learning, but it tends to be secondary to the process of learning. Action learning is where a participant reviews their own practice to improve performance by 'learning-though-doing' (Serrat 2008). Whereas cooperative inquiry is a reflective process which uses progressive problem solving, giving prominence both to the learning and research outcomes through the two inquiry cycles. This distinction maybe a moot point as in some cooperative inquiries, where the focus is on the learning-in-action, the distinction between action learning and cooperative inquiry is less obvious.

Action learning and cooperative enquiry use experiential learning cycles in the process of learning (Heron 1996, Pedler 1997). This is the basis for the learning

component of both action learning and action research. In each, action informs reflection and reflection informs the action. The reflection produces the learning (in action learning) or research (in action research), and the action is changed as a result of the learning or research, which leads to more learning or research (Dick 2000). Through the phases of the cycling in cooperative research, co-researchers can become co-subjects by becoming fully immersed in, and engaged with, their actions and experience (Heron 1996). This could result in some blurring in the distinction between action and learning.

The co-location of learning and action in this inquiry would imply more synergies with action learning than a cooperative inquiry, but how far this is a use of action learning or is an overlap of the experiential nature of both methodologies is difficult to untangle. Perhaps to note that there was a degree of overlap, but in this study we went beyond the learning processes of action learning to develop some research themes.

8.3 Collaborative inquiry in a hierarchical organisation

My overriding concern throughout this project was to create a collaborative inquiry. The position of the project within a hierarchical organisation raises the question whether we managed to inquire collaboratively. We did however achieve some collaboration in the development of the research strategy which reflected the concerns of the departmental staff through experiential knowing - a cornerstone of a cooperative inquiry. This is not to say we achieved full collaboration through the whole study. There were times where our 'sense-making' analysis appeared to be collusion. We recognised that although we may have inculcated the values of the organisation into our world view, there is a question of how conscious we can be of our 'knowing' and how authentic our self-reflection was in exposing our underlying beliefs and values. A tension exists in any analysis regarding the issue of authenticity as we may not always recognise our inherent bias. Although the CEG did recognise the implications of

our mindset we could have equally been unaware of those values and beliefs. I was reassured that the final research outcomes provided evidence of collaboration and indicated a knowing, which had a shared public reality with the departmental staff, not just the subjective understanding of the CEG.

At the start the inquiry the co-inquirers appeared to gloss over the difficulties of changing an identity which was embedded into a teaching culture. Ironically by simplifying the problem, this tended to use a mechanistic management approach to problem-solving. This may have been a way to counter the complexity of cultural change and the need 'to do' as a part of a management approach which is primarily mechanistic. Reflecting on the way the CEG had initially used a rational approach to developing the applied research strategy, I realised that my views, as part of the CEG, had more synergy with mechanistic management than I believed. I espoused the vales of collaboration but in reality my management approach drew on mechanistic assumptions.

When I began the journey I had a classic view of organisational change that drew on models of organisational change, which were pragmatic and problem solving. I was initially attracted to action research because of the pragmatic approach to change. I saw change as a linear process which was exemplified by Lewin's (1951) model of a negotiated change that involves the detection and correction of error. This is perhaps an over simplification of the model, but it illustrates a view of organisational change which was rational and pragmatic. Coghlan (2003) suggested that although action research is participative it can still be framed as *"mechanistic-oriented"* (p543). Mechanistic is defined as confronting and resolving a pre-identified issue in a social setting. This is contrasted with *"organistic-oriented"* (p543) approaches that gives value to, and focuses on, the process of change. Cooperative inquiry though uses an organistic approach; the use of a mechanistic change model may have affected the analysis of the project.

How far I inculcated the university values or the message, and reinforced behaviour learned within the hierarchical NHS, is unknowable. It appeared however that I had internalised a mechanistic management model, which mirrored the organisational problem solving approach. This was exemplified in our analysis and problem solving response. We saw resistance as a lack of motivation labeled as a 'smokescreen' to hide staff misunderstanding and fear, and responded by providing information, which could dispel the staff concerns. The solution was a rational response to a world view, whether or not the analysis was valid or in the spirit of cooperative inquiry.

Stacey (1996) describes this mechanistic world where a manager stands outside an organisational system, which is conceived as an objective pre-given reality that can be modeled and designed. This indicates that organisational systems are predictable and the work of change is through increasing the ability of individuals to control this complex world through highly defined tasks. This mechanistic approach contrasts with the organic values of de-centralisation and the unpredictable productive work embedded in cooperative inquiries. An organic approach does not fit comfortably in the university drive for efficiency, as the university mechanistic approach does not recognise the complexity of human interaction and the possibility of other perspectives, which could emerge through negotiation. The CEG however recognised the bias of our assumptions and rather than imposing our mechanistic assumptions on the project we attempted to allow the data to lead our understanding. This in turn enabled an organic approach to develop, and the staff voice to emerge, which challenged the dominant message of the university that teachers 'authority to teach' was through research.

8.4 'Authority to teach'

The teachers in this study gained credibility through a career trajectory that valued occupational experience and qualifications rather than research. As a

result the inquiry developed an occupational 'Scholarship Model', which recognised the need for a range of scholarly activities to promote credibility as occupational educators. This led me to explore what had generated the belief that research and teaching should be part of a single academic role as an appropriate model for teachers of occupational courses.

Nordkvelle (2006) noted that this notion of combining teaching and research into an academic role is not a new phenomenon. However it is the emphasis given to the research element which has gained prominence in the debate about an academic role. Boyer (1990) indicated that it was the so-called "*research universities*" (p45), that expect academics to be researchers, who value teaching much lower than research compared to other primarily teaching organisations. Teaching is a secondary consideration and the emphasis is on developing good researchers. So by valuing good researchers and devaluing teaching (by being of less importance) the emphasis is on lecturers needing to be good researchers. So the belief that good researchers makes good teachers appears to have been generalised from universities where not teaching is not valued.

There is a wide scale acceptance of the veracity of the claim that 'good researchers make good teachers' (Nicholls 2001, Nordkvelle 2006), but little research evidence to support this claim or any attempt to quantify 'good'. A small qualitative study of students' views of lecturers by Lindsay et al (2002) seems to support the view that research and teaching has a direct correlation. It indicated lecturers who also perform research motivate their students better; demonstrate more competence in supervision; spread enthusiasm and make more a convincing relationship between knowledge and practice than lecturers who don't do research. While this appears to be compelling evidence it takes a simplistic view of a complex issue. It doesn't ask fundamental questions about what sort of research activities, teaching experience, or occupational skills of the researchers make the researcher a better teacher, or what we mean by the notion of 'good'.

The literature asserts that good researchers make good teachers (Nicholls 2001, Nordkvelle 2006), but provides little research evidence to support this claim or any attempt to quantity 'good'. The relationship between whether researchers can be good teachers or teachers can be good researchers' remains problematic. As Brew and & Boud (1995) noted:

> *"Investigations of the link between teaching and research, of that there has been a large number, have failed to establish the nature of the connection between the two, or indeed, whether there is one."* (p261, Brew and Boud 1995)

The fundamental weakness of any attempt to quantify the link between doing research and being a teacher is what constitutes the criterion for measuring the benefits. There is limited agreement and availability of empirical evidence, but this doesn't seem to inhibit the widely held belief that research improves currency and effectiveness of teaching.

Nordvelle (2006) attempted to explore the link between teaching and research, but found no conclusive supporting evidence. He was unable to decide whether the link was a useful or problematic premise, but argues that they both involve making sense of phenomena in the world, which gives the idea some legitimacy. While it may be possible to map the comparable skills in research and teaching, the argument sidesteps the contradiction in an argument that values research and fails to provide the research proof to support the case for transferable skills. Clarke (2000), in an analysis of the historical context of research in universities also advocated that teaching and research have an 'essential compatibility' and research activity was a rich basis for teaching and learning. From Clarke's (2000) perspective, any view which intimates that research and teaching are incompatible is considered "*short-sighted and regressive*" (p219).Clarke (2000) offered no supporting evidence for his assertions, which suggests that his belief in the link is stronger than the

evidence. An earlier review by Brew & Boud (1995) were unable to determine whether accepting research gives teaching currency is an uncritical acceptance of a widely held assumption or a proffered view of an ideal belief. Either way it was not possible to determine the veracity of the link. Thus the limited evidence to support the notion that good teachers make good researchers and then applying it to all teachers is not only flawed, but also indefensible.

On reviewing literature there was also little evidence for the contrary view of the teachers in this study that 'good teachers do not make good researchers' as the roles are distinct. The view instead appeared to reflect the distinct career trajectories and roles of teachers of occupational courses, rather than drawing on supporting evidence. The staff in this study focused on developing their occupational knowledge and valued their role as a teacher, which they saw was a way to develop and transmit occupational values. Teaching draws from a wide range of evidence sources, not just research, and the role as an occupational teacher is constrained by the regulations and requirements of occupational registration and experience. This raises a number of serious questions regarding the relevance of applying a model of teaching which neither values teaching nor recognises the occupational body requirements for occupational education.

The university's 'authority to teach' is based on a flawed belief that involvement in applied research activities improves teaching credibility. This approach doesn't address the issue of credibility for teachers of occupational courses which draws on a broader range evidence to provide credibility, which includes occupational qualifications, clinical practice not just research. I would suggest that the 'Scholarship Model', which uses a broad range of scholarly activities that includes research and teaching activities, may be a more appropriate approach to provide the 'authority to teach' for occupational teachers.

8.5 Conclusion

The journey during this study has been significant as it has transformed the way I see myself as a manager within a higher education setting. The 'extended epistemology' of cooperative enquiry has helped me recognise that knowledge is emergent and contingent on context. Rather than accepting the assumptions of change drivers, I now explore the implicit values and direction of change. I have found that, rather than using a steering group to develop a strategy or policy, I now facilitate a participative approach. Cooperative inquiry enables participation although the process still has the potential for collusion if not managed effectively. I felt our inquiry was in the spirit of cooperative inquiry although our collaboration didn't fully preclude bias, but reflection enabled us to recognise the influence of our mindset and allow the data to drive our analysis. I recognise that the change in an organisational context can not simply reflect the participants' views, but the process enables a negotiated change that can be relevant and meaningful to those it affects.

Chapter 9.0 - Summary of the Developments and Findings

9.1 Introduction

Chapter 9 is a summary of the developments and the findings of the cooperative research inquiry. The project was an iterative journey which was influenced, in so many ways and at so many levels by the:

- university drivers to become a research focused organisation;
- university imperatives that all teachers were to be 'research active';
- occupational teaching identity which drew credibility from occupational expertise not primary research.

It is not my intention to summarise every nuance of the process and outcomes, but to use this section to draw attention to some key issues developed through the cooperative inquiry. The wider implications of some of these findings will then be explored in chapter 10.

9.2 Context for the Study

The impetus for the project came through a university strategy to become a research-focused institution, contributing and gaining income through the REF assessment, where previously it had been teaching-focused. The approach was inclusive and all staff were expected to become 'research active' so that they would have 'authority to teach'. This indicated that teaching credibility would be through primary research the academics were engaged in. The challenge was

to understand how to facilitate alterations in the role of the academic in a department, which was teaching focused and had resisted change.

9.3 Cooperative inquiry

The choice of methodology was an iterative process that began as a broad commitment to action research which evolved into the adoption of cooperative inquiry. Cooperative inquiry, as a form of person-centered participative inquiry, breaks down the separation of the roles between the researchers and subjects (Heron 1996). The project outcome was constrained by the university agendas, however the inquiry process provided an opportunity to negotiate the change with those it would affect – the teachers. How possible it was to be collaborative in a hierarchical organisation was debateable, but the participative relationship among all those involved was an attempt to create change that was meaningful for the departmental staff.

As a collaborative endeavour the research was neither singular nor linear in nature as the design was emerging. Once the study dialogue began the direction and even the goals of the research, were shaped by the co-inquirers. The project objective was to use cooperative inquiry to construct a departmental applied research strategy as a vehicle for cultural change. The process of constructing the research strategy would begin a collaborative dialogue of formal and informal interactions with the co-inquirers and the wider departmental staff. It was anticipated that the collaborative development of a strategy would facilitate ownership and improve engagement with research by the department staff. The project aimed to explore the research academic role for occupational teachers by collecting and analysing data from the inquiry group reflections; focus group discussions; research interviews and the feedback from the departmental meetings.

9.3 Learning-in-action outcomes

The outcome of the learning-in-action revealed that there was evidence of a link to a occupational identity as a caring practitioner which was transferred to occupational education. The work of the co-inquiry group to provide a meaningful strategy was not without some difficulties. The consensus of the inquiry group bordered on collusion at times as our understanding was filtered through our own lens. The cooperative inquiry provided a chance to reflect on the data through two learning-in-action cycles. This enabled the co-inquirers to recognise the impact of their own worldview on the data analysis. Through the cycles they moved from a world view that resistance to becoming research active was a 'smoke screen', which stemmed primarily from lack of confidence and research experience, to an understanding of the importance of a 'teacher identity' as part of a occupational teacher role.

9.4 Research outcomes

The inquiry group analysed the interview transcripts to explore the reasons for the antipathy towards research. The analysis revealed that the expectation of teachers becoming researchers challenged a teacher identity, which was culturally embedded as part of occupational practitioner role. Credibility for occupational teachers came through occupational expertise and a scholarly approach, which was a part of a occupational career trajectory. The teachers in this study indicated that a teacher and researcher roles were distinct that was a view which contrasted with a university expectation that all teachers were to be research active. The strongly articulated but polarised positions raised questions about the uncritical adoption and application of a research model for occupational teachers.

9.4 The Department applied research strategy

The CEG recognised that if the departmental applied research strategy was to be relevant and have impact, it needed to link the 'teacher identity' in a meaningful way to the strategy to create change. The result was a change in the emphasis of the departmental research strategy to include an occupational concept of credibility through scholarly development. The 'Scholarship Model' broadened the concept of applied research to include: primary research, publications; seminar/conference presentations; evaluations; audit and secondary research linked to teaching and occupational practice. The departmental applied research strategy, although not specifically about REF submissions, moved the department towards developing a scholarly research culture. This approach was more likely to effect change in the department as the 'teacher identity', which had been a reason to resist change, was now part of the strategy for change.

9.5 Conclusion

The New University, where the project was set, had committed the organisation to raising income through research, where previously it had been through teaching contracts. This was a significant change for occupational teachers who had been employed for their occupational and clinical expertise not for their research portfolio. Using cooperative inquiry to create change was a departure from the usual management process of consultation. The cooperative inquiry process was not easy and the inquiry was, at times, affected by the subjective lens of the co-inquiry group. The development of the 'Scholarship Model', imbedded in a departmental applied research strategy was more likely to affect change as the teacher identity, which had been a reason to resist change, was now part of a strategy for change. In addition, we gained organisational endorsement of a strategy by arguing that using a model (that included research) was a step towards developing a scholarly research profile.

The cooperative inquiry journey has raised some important considerations for teachers in higher education whose 'teacher identity' is a continuation of a occupational career. These teachers, rather than gaining credibility from research, drew credibility from occupational qualifications and expertise. This challenged the notion that occupational teachers can (or should) engage in primary research to provide credibility for teaching. It also raised questions about the validity of the interconnection between research and teaching that has been adopted uncritically by new universities.

Chapter 10.0 – Wider Relevance of the Study and Concluding Comments

10.1 Introduction

The engagement with research as part of an academic role is significant for universities who are aspiring to develop a research profile where previously they were teaching-focused. The expectation for all staff to become 'research active' was, and is, a significant change to the role and job of staff whose primary role is teaching. Yet the expectation of a change to job requirements is not specific to this department or university, as Taylor (1999) noted that for:

> "*...the majority of academics, the emergent job demands are not the demands described or implied in the 'job descriptions' of the positions for that they were originally employed.*" (p47, Taylor 1999)

This is not to negate the impact of the change for the department, where this study is set, but to recognise this inquiry's findings and methodology may be relevant for a variety of academics in higher education settings who are facing role and cultural change.

Cooperative inquiry provides a unique insight into the perspectives of those who the change would affect, which is in contrast to most management change initiatives. The study identified the deep seated teacher identity linked to clinical expertise for the occupational teachers in this department. The outcome was a departmental applied research strategy which used a 'Scholarship Model' as a way to develop a research portfolio for occupational teachers in higher education. To address the wider implications of the inquiry I will explore the issues under the following headings:

- Using cooperative inquiry to create change;

- A teaching and research role in higher education;
- Scholarship as credibility for teaching;
- Recommendations for further inquiry.

10.2 Using cooperative inquiry to create change

I would encourage other departments considering cultural change to consider using a cooperative inquiry process. The collaborative nature of cooperative inquiry provides useful insights into the impact of process on those that the change affects. This can influence the direction and outcomes which could facilitate effective change.

I recognise using a cooperative inquiry within a hierarchical institution may be challenging, since the dominant voice(s) of that organisation can drive changes which may not be in spirit of collaboration. However this cooperative inquiry, within a hierarchical organisation, provided times of reflection that enabled the voice of the departmental staff to emerge. Being able to interrupt the change process and provide opportunities to work through the process collaboratively was enormously powerful. It may be argued that using a steering group with a consultation could have achieved the same outcomes. Yet in my experience steering groups are often enacted with expediency and any consultation can be tokenistic which does not capture a perspective that reflects the real concerns of those involved in the change process. The outcome in this inquiry was not simply a management initiative, but the emergence and development of a strategy by, and meaningful for, those who would be affected by that change.

It would be naive to suggest that cooperative inquiry is simply a way to empower the participants since change does not occur in a vacuum. Any organisational change is constrained by the institutional agendas. I accept that participative approaches have been criticised as a 'soft form of domination' with

the focus on the process obscuring questions about whether the proposed outcomes are in the best interests of the participants. Cooperative inquiry can not be used as a panacea to replace hierarchical and bureaucratic processes (Courpasson 2000, Clegg et al 2005, Cooke 2006), but offers a way to allow the voices of the participants to be heard. The process is not easy as the experiential reflection, which is at the heart of the inquiry process, can be affected by the mind set of the co-inquirers unless there are mechanisms for feedback to enhance the validity of inquiry outcomes. Using cooperative inquiry creates an active engagement with the change process and provides opportunities for a negotiated change that is in contrast to the creation of a steering group, which has a mandate to problem solve and implement solutions.

10.3 A teaching and research role in higher education

I have already argued that a research role may not be appropriate for occupational teachers in chapter 8. I do not intend to reappraise the arguments again. Instead I want to consider teaching as a feasible role in its own right rather than simply adopting the drive towards an academic research role.

In this study some teachers suggested they would like to invest energy in a teaching role while others could develop research roles. Perhaps the use of some teachers to develop a research profile may be useful as an exclusive approach to improving a research culture in higher education. However exclusive strategies to enhance research capacity are only realistic if teaching is recognised as a valid alternative career choice not secondary to a research career. Greenbank (2006) goes so far as to suggest that the status of teaching needs to be raised and calls for a role re-evaluation of academics in higher education, particularly where teachers have dual occupational and academic accountabilities.

I recognise that an alterative teaching career is difficult in an environment which values research. Yet this inquiry indicates there are difficulties for occupational teachers when prioritising expectations for both a researcher and teacher role. The staff in this inquiry believed that you can not be a good teachers and a good researcher. This view was just as vociferously defended as the widely accepted university notion that there is a desirable and recognised teaching-research interconnection. Although neither position was supported by any evidence, each defended their polarised positions. I am not suggesting that research role is abandoned for those who want to be teachers since there is a place for research in teaching. However a research role for teachers needs to be evaluated, not merely adopted uncritically, which gives some consideration for the impact on the quality of teaching and on the teachers it affects. I would argue that there is a need for a critical debate on the nature of the role of occupational teachers in higher education rather than an acceptance that being an academic requires a teacher to be researcher.

10.4 Scholarship as credibility for teaching

This inquiry suggested that rather than research providing credibility it could be achieved through scholarly development. The development of a 'Scholarship Model' provided a way to ensure teaching and research as knowledge was integrated into an academic role. The model provided a framework that gave credibility for teachers through scholarship that included, but was not exclusively through, research. This has implications for all teachers with dual occupational and teaching accountabilities, and may be of value to all teachers developing an academic role within university settings.

Until recently scholarship was considered an important part of an academic role (Rolfe 2009). Scholarship represents the creative work that is measured by the ability to think, learn and communicate ideas (Elton 2005), that Rolfe (2009) describes as *"everything that an academic does apart from teaching and*

research" (p819). Elton (2005) noted scholarship provides a critical perspective which interprets what is already known and *"is necessary as a precondition for both good research and good teaching"* (p 252). However research has pushed aside notions of scholarship in favour of scientific values (Boyer 1990), so debates on what it means to be an academic have been reduced to how to develop research capabilities and capacities (Thompson 2009).

A broader range of scholarly endeavours that could contribute to the development of an academic is relatively absent in the occupational literature. The 'Scholarship Model' of this inquiry was an attempt to recognise the importance of academic scholarship. The model broadened and created flexibility for teachers to start with teaching and then to engage in a scholarly work at many levels. It was not our intention to merely re-label occupational activities so they could be considered research, but to create a scholarly framework that included, but was not focused exclusively on, research. This approach was supported by Rolfe (2009) who argued that there is a need to reclaim the notion of scholarly development (in its broadest sense) for nursing as part of an academic role, rather than the narrow perspective that research provides. I would argue that scholarly development for an academic role is relevant for a wide range of university teaching roles not just nursing. It is interesting to note that the White Paper in 2003 encourages those universities which do not attract research funding not to be concerned with research, and should engage in a form of scholarship that involves keeping up to date with current developments which are relevant to their teaching (DES, 2003). This message has been largely unheeded, with scholarship being devalued. As Anderson (2000) pointed out, the terms 'research' and scholarship are now used:

> *"..to distinguish between the people who really do the research and the rest who merely need to "keep up".* (p63, Anderson 2000).

The need for universities to generate income and esteem has affected the way in which academic plans and strategies have been developed. Research is no longer viewed as one aspect of the work of an academic, but has increasingly become the most essential function. Despite attempts to raise the status of teaching in higher education through the establishment of the Higher Education Academy, research still dominates the debates on an academic role. While this study offers an alternative (or perhaps a return to) a scholarship as part of the work of an academic, this approach will not be valued unless scholarly endeavours provide esteem and financial rewards.

There is a need to reconsider the universities drive for research (particularly contributions to the REF) on the teaching role. The pressure to develop research outputs has been seen to exert a negative impact on teaching activities and broader scholarly developments (Elton, 2000, Coate et al 2001, Gordon et al 2003), as energy has been focused on developing a research profile in universities. Instead the implications of the impact of the current economic and political drivers need to be acknowledged and debated rather than research becoming accepted and normalised as integral to an academic role.

10.5 Conclusions and recommendations for further inquiry

This project has raised questions about the uncritical acceptance of a research-teaching interconnection within an academic role in higher education. This New University (as are other universities) is embracing the notion that research provides credibility for teaching, which has limited supportive evidence. This is an uncritical acceptance of the notion that good researchers make good teachers, with limited supportive evidence. There are few voices challenging this drive towards a research academic role for teachers in university settings.

The nature of an academic role for teachers of occupational courses (leading to occupational registration) has been caught up in the discourse of research providing credibility for all teachers. This project highlighted that many teachers in this department neither wanted, nor felt they had the capability, to be researchers as their credibility was as occupational practitioners and teachers. The impact of research as part of an academic role has not been fully explored. Studies have tended to focus on developing research capability and capacity in university departments (Green et al 2007) without considering the impact on an occupational teaching role. This study raised questions about the uncritical acceptance of the assertion that research provides credibility for all university teachers.

The drive for new universities to become research focused will continue to gain momentum in the next few years in the current climate of higher education funding changes. The Browne (2010) Report and Comprehensive Spending Review (HM Treasury 2010) indicates that universities will need to continue to seek other sources of income, including research, in an increasingly competitive market. The impact of these changes is likely to increase the drive for all teachers to become research active as a way to increase the university income. Yet the effect of this drive, for occupational teaching in particular and university teachers in general, is sadly absent from the literature. This study is timely as it raises questions about the impact of the new universities drive to compete for REF funding.

It is unlikely in the current economic climate that the drive for REF funding by new universities will abate, but I would question any strategy which requires all academics to be engaged in primary research. In the spirit of scholarship there is a need to create a critical debate on what it means to be an academic. This will hopefully create an interruption in a discourse that appears to have uncritically accepted a research and teaching interconnection. We need instead to evaluate the relevance for, and the impact on, the teachers it affects.

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Appendices

Appendix 1

Glossary

Glossary

The terms occupational and vocational teachers are often used interchangeably for some professional education such as nursing as there is a degree of overlap in the technical and practical requirements, but the education requires a higher level of academic rigor. However they do not mean the same thing and for clarity I will use the following definitions;

Occupational Teacher;

These are teachers of courses that lead to admission to an occupational Professional Register. Although some occupations incorporate technical skills, such as nursing the education requires additional academic rigor leading to diploma or degree awards.

Vocational Teacher;

These are teachers preparing people technical work that is traditionally focused around training needs and tends to be competency and non-academic.

Appendix 2

Ethical approval

Copy of ethical approval from Sheffield Hallam here

Appendix 3

Information and consent forms for the Collaborative Enquiry Group

Information sheet for participants for the collaborative inquiry group

Introduction

There is a need to develop an applied research strategy for the Department, but I would like to use a collaborative process that enables the staff to inform the development of the strategy. To achieve this I am proposing to lead a small collaborative enquiry group that will aim to explore how we can develop applied research activities as a department. The group will include members of the teams within the department so that to collect comments and suggestions from their colleagues will be used to help shape the strategy. Agreed strategies will then be implemented and other volunteers from the department will be asked to participate in interviews to further inform the strategy.

What is my involvement?

You are invited you to participate as a member of the collaborative enquiry group. In the spirit of collaboration you will be invited to contribute ideas and comments so that the development of an applied research strategy that we feel are realistic and achievable. In addition I am anticipating that any member of the group, who would like to, will be able to use this experience as an opportunity to write up their experiences and also be part of the writing up the process for my Doctorate.

Why have I been asked to take part?

It was felt you could represent your colleagues and as a collaborative project it is important that all members of the department can feel they are able to have a way to contribute their ideas. The enquiry group members will form an important part of the process in representing your colleagues and then sharing ideas and suggested strategies with the group.

How long will this project last?

This project will start in April 2007 and be completed in December 2007. Your contribution will be as a member of the group for this time only.

What will it involve?

As a member of the group this will involve meetings agreed with the group on the first meeting to agree strategy and cascade information to and collect views from the team you are a part of. The feedback will be anonymous so no individual will be identified and the group will discuss the issues raised to agree and develop a strategy.

It is hoped you can attend as many of the meetings as possible. I anticipate there will be a maximum of 6 meetings.

What if I do not wish to take part?

You will be able to refuse and this will in no way reflect on your role within the department.

What if I change my mind?

You are free to withdraw at any time without giving an explanation and without any effect on your role within the department.

Who do I complain to?

If you have any concerns or question about this study please contact me (Christine Whitney-Cooper) 024 XXXX XXXX ******@xxxxx.ac.uk or if you prefer contact ****** Head of Psychology 024 XXXX XXX j*****@xxxxxx.ac.uk

What do I do to take part?

If you are willing to participate please complete the consent form attached and place in the addressed envelope. This should then be given to ********** (Departmental Secretary). She will not open the letter, but pass it to me. I will contact you with further details of your involvement.

Consent Form

I have read and understand that information sheet and I confirm that;

My participation is voluntary and I am free to withdraw at any time without giving any explanation and that this will not affect my role within the department.

I understand that my contribution will be used to inform the project outcomes, but the information will be confidential and I will not be referred to by name in any reports without my prior, explicit permission.

I agree to take part in this study as a member of the collaborative enquiry group.

Name of participant:.....

Signature:..... Date: .....

Thank you for your participation

Appendix 4

Information and consent for the Interviews

Information sheet for participants in the interviews

There is a need to develop an applied research strategy for the Department, but I would like to use a collaborative process that enables the staff to inform the development of the strategy. To achieve this I am proposing to lead a small collaborative enquiry group that will aim to explore how we can develop applied research activities as a department. The group will include members of the teams within the department so that to collect comments and suggestions from their colleagues will be used to help shape the strategy. Agreed strategies will then be implemented and other volunteers from the department will be asked to participate in interviews to further inform the strategy.

What is my involvement?

You are invited you to participate in the interviews. In the spirit of collaborative enquiry the interview will take the form of a conversation. This is less structured than many research interviews, but hopefully allows you to feel comfortable in sharing of your ideas and comments to inform the development of an applied research strategy.

Why have I been asked to take part?

As a collaborative project it is important that all members of the department can feel they are able to have a way to contribute their ideas. You have been asked to become part of the interviews that explores how you feel the strategies for applied research have affected the applied research activities and what could be done to improve the Department strategy.

How long will the project last?

The project will start in April 2007 and be completed in December 2007. Your contribution will be as a one of the interviewees during this time.

What will it involve?

The interview will consist of a one-hour taped interview, that will be transcribed during the project. The transcript will anonymous and confidential. You will be able to see the transcript and confirm its accuracy. Issues you raise that may be of benefit to developing a strategy will be discussed with you and included in the feedback to the collaborative enquiry group, but you will not be identified by name.

What if I do not wish to take part?

You will be able to refuse and this will in no may reflect on your role within the department.

What if I change my mind?

You are also free to withdraw at any time without giving an explanation and without any effect on your role within the department.

Who do I complain to?

If you have any concerns or question about this study please contact me (Christine Whitney-Cooper) 024 XXXX XXXX ******@xxxxx.ac.uk or if you prefer contact ****** Head of Psychology 024 XXXX XXX j*****@xxxxxx.ac.uk

What do I do to take part?

If you are willing to participate please complete the consent form attached and place in the addressed envelope. This should then be given to ********** (Departmental Secretary). She will not open the letter, but pass it to me. I will contact you with further details of your involvement.

Consent Form

I have read and understand that information sheet and I confirm that;

My participation is voluntary and I am free to withdraw at any time without giving any explanation that this will not affect my role within the department.

I understand that my contribution will be used to inform the project outcomes, but the information will be confidential and I will not be referred to by name in any reports without my prior, explicit permission.

I agree to be interviewed as part in this project.

Name of participant:.....

Signature:..... Date: .....

Thank you for your participation

Appendix 5

Identification of sources of data

Sources of Data

Indicator	Source	Number	Date	Index	Group
MN	Meeting Notes data	1	25/04/07		CEG
		2	15/06/07		CEG
		3	18/07/07		CEG
		4	17/09/07		CEG
		5	16/11/07		CEG
		6	18/01/08		CEG
FG	Focus Group data	1	15/06/07		Nurse (adult, primary care)
		2	18/07/07		Nurse (child, adult)
		3	17/09/07		Emergency care/paramedic
T	Transcript data (Interviews)	1	12/07/07	1	Nurse/manager (community care)
		2	15/07/07	2	Paramedic
		3	12/11/07	3	Nurse (Palliative care)
		4	13/11/07	4	Paramedic
		5	21/11/07	5	Nurse(critical care)

Appendix 6

Department Applied Research Strategy

The Department of Nursing, Midwifery xxx XXXXX Applied Research Strategy

Introduction

This strategy was developed through the work of the Collaborative Enquiry Group (CEG). The CEG represents members from teams within the Department, and as part of their role, the members of the group canvassed staff opinions, beliefs and values about applied research. The CEG used this information and discussed what would need to be done to make the Department Applied Research (AR) Strategy (within the context of the University 2010 objectives) realistic, achievable and an integral part of the department culture.

Context

The strategy was written in light of the University strategy that states that the defining characteristic of XXXXX University is that it:

> *" .. is a successful modern university is an active applied research agenda that underpins its teaching and culture in the way it interacts with the external community."* (Marshall 2005)

This statement identifies the driver for the '*authority to teach'* that is compatible with the aims of the professions we represent. Evidence based practice is fundamental to our teaching and practice, but unlike some university departments, historically our authority to teach has primarily come through clinical experience not via research. Although most staff in the department have some research experience this has been primarily through academic qualifications rather than externally funded research, with the role of the academic mainly as a teacher rather than researcher. However the aspirations of department and the professional groups within Higher Education are to develop a new role where research is integral to the academic teaching role. This would give us a significant challenge as it requires a cultural change in understanding how research may become part of the day-to-day teaching role.

This strategy is timely as it coincides with the recent UKCRC publication 'Developing the best research professionals'. Although aimed at the nursing profession the issues identified have relevance for all occupational academics. The report recognises the work barriers that prevent researchers achieving their potential and the need to develop a highly skilled workforce. It envisages a flexible career structure that combines a clinical, academic and researcher roles that provides opportunities to peruse research at all levels.

Evidence collated by the CEG suggests that there is an understanding and positive recognition for an AR strategy and the importance of research as part of the academic role within the department. However concerns were raised about how this could be facilitated, particularly as this requires protected scholarly time, funding and integrating research in a teaching role. Thus, this strategy will address these elements to provide the framework that provides opportunities for all staff to be able to contribute to the department and university AR strategy.

University AR Strategy

The University defines AR as;

> *"…. activities that include externally funded projects, pedagogical research and related curriculum developments, all forms of knowledge exploitation (spin out companies), consultancy, non credit rated courses and internationally recognised professional creative practice".*

This definition highlights the scope of AR, but the engagement in these activities remains a challenge where this has not been an expectation of an academic role. Thus, the University has invested in promoting staff development through Applied Research Groups (ARG) and Centres (ARC) with funding to support projects such as Knowledge Transfer Grants (KTEG) that promotes

collaboration with business partners through matched funding of up to £3,000. In addition the centre for Inter-professional learning has also provided funding for staff release to develop e learning objects for teaching, research and publication. All of this is helpful and we have engaged (and had some success) with some of these opportunities. However we would like to develop an inclusive broader strategy that with some of these elements and offers support and opportunities for all staff to participate in applied research.

The Department Perspective

Research as problem solving, data collection and analysis is fundamental to our teaching practice although it is not always formalised as a research project. Every time we ask why are students failing; analyse the effectiveness of a teaching strategy; or evaluate a module, there is an opportunity to formulate a research project. Thus, we would like to develop a broader perspective of applied research as scholarly activities within the department. This includes ways to support the development of teaching and clinical projects that can contribute to our scholarly outputs and research profile.

The Academic Research Teaching Role

Equally valuing teaching and research is a key element of the department strategy that requires a significant change of culture, to create an integrated professional teaching research role.

Academics within the department have a clear teaching career structure that has not been located in research, with a research career seen as separate to a teaching career. But, locating a teaching role in a research structure provides not only the possibility of developing clinical research; but also a unique opportunity to develop teaching practice and clinical practice that is linked to the education of students.

To facilitate a teaching research role support will be offered around the following project areas:

(1) Exploring ways of evaluating and improving curriculum delivery
(2) Developing strategies to support student education in clinical practice
(3) Knowledge that adds to a professional knowledge base
(4) Formation and development of research interest groups/ARG's

Current Developments

The Department has engaged with the University strategy and had particular success with the development of Applied Research Groups (ARG's) in Public Health and Pre Hospital Care. Both have enabled the development of research skills and each has achieved outputs in KTEG and Inter-professional learning projects and publications. The appointment of a Professor in Emergency Care has further strengthened the development of external bids and consultancy. Funding will be explored to secure the appointment of research chair/reader post(s) for the future development of the PH ARG. However this is only one part of the department AR strategy. We are conscious that while the success of the ARG is a positive achievement by grouping staff around speciality areas some staff may not feel able to participate in an ARG as their experience is not around the two areas outlined.

In 2006/2007 28% (17) of staff have engaged with AR through an ARG and Applies Research Centres (ARC) and the development of ARG and ARC's will continue to be a part of the department strategy. However we recognise this approach has resulted in some staff feeling excluded from the research developments. Thus we need to explore ways to engage staff in other department and Faculty activities. There are other opportunities such as engagement with other Faculty ARG/ARC or the potential to develop other ARG's, although this requires the development of groups of staff with specific research skills or professional expertise. Thus, to broaden the scope of our AR scholarly opportunities it is our intention to;

- Develop a department funding system to support small in-house scholarly projects as an opportunity to further develop a research profile
- Formulate a programme of department research sessions to build expertise and confidence in developing research projects
- Support staff to apply for funding through a "buddy" system
- Advertise the work of the Faculty ARG/ARC groups
- Encourage the formation of interest groups to begin to explore some areas of potential future department and/or cross faculty ARG's.

The increase in staff participating in scholarly activities has also been mirrored in a 200% increase in outputs for 2006/2007 achieving outputs from 18 (30%) staff. The aim is to have a yearly increase in the number of staff engaging scholarly activities and research outputs through Faculty targets. For 2007/2008 the target is to engage all staff and to have an increase of 35% (21) of staff developing outputs that could contribute to the Research Assessment Exercise (RAE). The only way this will be possible will be to address a major concern that was raised with members of the CEG; "*protected scholarly time*".

Protected Scholarly time

A need for protected time release for scholarly activities was clearly an issue. Although 25 days a year are provided at times this is eaten up by other priorities i.e. marking and teaching, with research being regarded as less important particularly if the outcome is not as pressing as teaching commitments. It is recognised that meeting student needs is important as this is the main source of the department income, but research can positively influence student experience that requires a shift in our perception in the value of research.

From the feedback it is also clear many staff book scholarly time, but don't use it for scholarly activities; however this is not always obvious in diaries. Thus, where scholarly time is booked it is protected, but if for any reason this is not utilised diary entries need to be amended and your line manager alerted. This

will enable us to see how effective the applied research strategy is and where there is evidence that the strategy is not proving to be effective we can then look at ways to strengthen it.

Every effort is made to ensure staff gain release opportunities although we recognise the ability to buy in the right calibre of support to allow staff to be released has been challenging. Thus meaningful *'buy out'* of scholarly time in advance that is protected is an important part of the AR strategy document. Concerns about being able to replace some specialist teaching were raised, but if scholarly time is planned well in advance (annually) then it should be possible to arrange sufficient specialist cover.

Consideration of how to protect scholarly time was discussed, and it is suggested that staff allow team members to have sabbaticals. The sabbaticals will have agreed activities and outputs.

There are a number of ways to achieve protected time through sabbaticals, but it is recognised that not all models are suitable for all teams, and some teams have particular peaks and troughs in their teaching year that could be mapped against the protected research time. Thus, it is suggested that each team agree a model with their line manager that would suit their academic year from one of (or combination) the models below so that all team members would have agreed protected scholarly time within a cycle. During the time of protected scholarly activity staff will not be expected to check their emails. However it is recognised that in exceptional circumstances staff on scholarly leave may need to be called on for unavoidable emergencies during this period and they will be contacted by telephone. This must be a last resort and changing of protected scholarly time must be negotiated. Should scholarly time be lost due to other priorities efforts made to reimburse the scholarly time and (as far as possible) to run continuous with the original authorised block of scholarly leave. Thus, each team member could be allocated:

(1) A large block of time up to 1 month. This would provide large 'chunks of time' rather than days that are easier to move and more difficult to protect. Also the loss of a day does not have so great an impact if scholarly leave is interrupted.

(2) A medium block of time of up to 2 weeks. This would enable individuals to utilise quieter periods to work on a project. This may not be useful if the project requires interaction with students.

(3) A small block of time up to 1 week. This would be easier to move to provide more flexibility in meeting the teaching and research commitments.

(4) A small block of time spread over the year. This would be up to a day every 2 weeks for scholarly time (total of 25 days annually) for each team member. This could be amalgamated depending on availability and holidays etc. This is the most at risk of being moved. If scholarly time is given priority then every effort should be made to protect this time.

Opportunities to develop research

Developing a project proposal can be time consuming and daunting particularly if staff have never applied for research funding. Thus, the CEG feel that opportunities to start with a small project can be facilitated through Department support mechanisms and funding.

To enable staff to be supported in the development of projects the department will a will formulate a 'buddy system'. This will be initiated when a member of staff discusses ideas for potential projects and explores potential sources of funding with their line manger. Each member of staff will negotiate with their line manger a mentor or mentors(s) that may be able to guide them through the process. We have a number of staff have achieved successful KTEG bids (Knowledge Transfer funding) who can support colleagues and a number of experienced researchers within the Department including; Dr Margaret XXXXX Professor Tom XXXX, Dr Colin XXXXX and Professor XXXX XXXX who may be able to offer advice on the potential and viability of proposals.

Project funding may be applied for jointly, with the contributing members providing a diverse team of project/research expertise to sustain the implementation of a proposal. To support these initiatives the Department will set aside scholarly time and funding for the development of a project idea that can be applied for through the Department Staff Development Fund (This can be applied for through your line manager). In addition a number of projects will be advertised within the department such as curriculum development or student support, that staff will be invited to submit a short abstracts paper (guidelines will be provided) to gain funding. As funding is finite the success of applications will depend on the number and quality of applications. Opportunities to discuss potential ideas for projects prior to submitting a bid will be available through the department research programme.

Funding

Feedback indicates many staff felt that to be successful in research, funding needs to be *'attainable and gettable'*. There are some available funds locally that may be applied for (Appendix 1), but in addition funding, via the department will be available. Each project could bid for up to £500 (from a maximum total funding of £2,000) that would provide support. This process would give a 'taster' experience of applying for funding and also enable the development of publishable research to meet the aims of the DPR and provide an opportunity to develop the first stage of a project. This may also improve the success further small grant applications as evidence of previous work often adds weight to research bids.

To apply for the department AR funding, staff would need to make applications through their line manager. This would then be agreed through the Department Management Meeting as any other application for funding. Funding priority will be given to individuals or groups who have projects that would have an impact on professional development, teaching practice, curriculum development or clinical practice.

Any member of staff who would like support in applying for any research funding should discuss their proposal with their line manager. A 'buddy' will then be suggested who could help staff through the process of application.

Potential Department Research Projects

The department had been mapped to look at what research focus individuals had to identify clusters and professional focus. The outcome showed a very diffuse pattern of professional focus and methodologies. In part this may be due to the process of using CV's. Thus, the research map of the Department will be redrawn to identify some areas that could result in identifying the potential formation of interest groups.

In addition, a minimum of 2 curriculum development will be available a year that staff may like to explore and apply for funding. They are likely to relate to teaching practice or quality standards that will be used to inform professional practice within the department.

References

UK Clinical Research Collaboration (2007) Developing the best research professionals. Qualified graduate nurses; recommendations for preparing and supporting clinical academic nurses of the future. UKRCC

Appendix 1

Potential Sources of Small Project Funding

Local

(1) Small research grants for research (£6,000) within primary care through the Warwick and Coventry Primary Care Research network www.warwick.ac.uk/go/primarycare

(2) Small research grants (Up to £3,000) for inter-professional learning from the Centre for Inter-professional e learning www.cipel.ac.uk/research/research.htm.

(3) Knowledge Transfer Grants (KTEG) from Coventry University. This requires equally matched funding with a partner such as a clinical practice area (up to £3,000)

National

(4) Florence Nightingale Travel Scholarship (3-4 weeks study leave open to registered nurses and midwives) http://www.florence-nightingale-foundation.org.uk/scholarships.htm

(5) Higher Education Academy funding for projects related to curriculum development/teaching practice (there are small and large grants available) http://www.heacademy.ac.uk/ourwork/research

(6) Foundation of Nursing Studies (Supported by the Burdette Trust) offers grants of up to £5,000 for clinically led projects with academic links http://www.fons.org/ahcp_practicedev.asp