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Action Research in Social Entrepreneurship: A Framework for Involvement

Mathew Tasker, Linda Westberg,
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This paper presents a social entrepreneurship undertaking that has been both a motivation and exemplar to develop action research methods. The complexity of social entrepreneurship and action research processes are presented, highlighting the need for an organising framework that will both provide support and allow for flexibility. The Action Research Cycle, with five key episodes and an emphasis on the dynamics of ebb and flow, is proposed as a framework for understanding and managing social entrepreneurship projects. Drawing on the social entrepreneurship project *Mushuk Muyu*, examples highlight the application and use of the framework. The paper concludes with key insights, strengths and weaknesses, and the benefits of using the framework.

Key words: action research, social entrepreneurship, research method, participation, framework

Introduction

Academics are increasingly choosing research environments that are rich in complexity and that provide an opportunity for learning. Additionally, academics are realising that in some of these environments their active participation rather than passive observation would be beneficial. This paper describes one such research setting, the project *Mushuk Muyu*.

The *Mushuk Muyu* (meaning new seed) project was designed to recuperate the local indigenous Kichwa language and culture in the Ecuadorian Andes. The project was initially developed over the course of a fourteen-month period in the Ecuadorian Northern Andean area of Cayambe. A team of local teachers and community members worked with volunteers (including two authors of this paper) to create a range of products. These outputs include: 67 experimental multimedia classes for bilingual local schools and four textbooks that were accepted for publication on a national scale by the *Ministerio de Educación del Ecuador* (MEE) and the *Dirección Nacional de Educación Intercultural Bilingüe del Ecuador* (DINEIB). Though the project continues to grow and develop in new and innovative ways, this paper focuses on the initial 14-month period of activity.

This paper is motivated and initiated by the engaged practice of two of the authors, who developed and applied action research (AR) methods to build and understand the processes of the *Mushuk Muyu* social entrepreneurship project. AR is an important approach appropriate for tackling the complexity of community-based initiatives and ventures. It has been only rarely applied in the context of social entrepreneurship, even though the combination of research and participator-led action promises not only to generate new knowledge, but also to solve real problems.

In undertaking this project, we have concurrently developed and applied a theoretical framework, the Action Research Cycle (ARC), which consists of five episodes and recognises the dynamics of ebb and flow. This organising framework is proposed as a means of supporting, without limiting, the action researcher. Specific insights regarding the individual episodes of the ARC are then elaborated upon with reference to the project. The paper concludes with the strengths and weaknesses of AR in the context of social entrepreneurship, with the conclusion that the framework provides an appropriate scaffold to allow a researcher to manage for flexibility, complexity, and recoverability of an AR project in the context of social entrepreneurship.

Catalysts for theory development

Undertaking research while at the same time dealing with the difficulties associated with a complex social entrepreneurship project proved to be a catalyst to theory development.

The Mushuk Muyu Project

The *Mushuk Muyu* project was set in a very complex social environment:¹ It involved *multiple participants* (community leaders, teachers from four community schools, a well respected Kichwa linguist who ran a local NGO, students from two community schools, parents from three communities, one local indigenous activist, various indigenous individuals working with the Kichwa culture in Quito, three local NGOs, and DINEIB), *multiple activities* (planning, brainstorming, writing, negotiating, recording, photographing, compiling, and presenting the material), and *multiple locations* (schools, communal buildings, private residences in three different communities in Cayambe, and the offices of NGOs, DIPEIB-P² and DINEIB in Cayambe and Quito).

Mushuk Muyu initially developed workshops that taught Kichwa to adults and children outside the classroom, as well as multimedia publications and lessons for use in schools as part of *Las Unidades Educativas del Milenio*

¹ Despite the Ecuadorian constitution recognising the plurinational dynamic of the state, and the increasing political power of larger indigenous groups, a long history of violence towards, and repression of, indigenous peoples by the Incan empire, Spanish conquistadores, and wealthy landowners through the feudal *hacienda* period of the 19th century, has had a profound impact on the cultural and historical identities of many indigenous people in Ecuador. In the area the authors worked, many families expressed concern over the loss of their cultural history and their inability to pass on their mother tongue and saw bilingual schools as a key environment for their children. As a result of this the Ecuadorian government has played a pioneering role in designing an intercultural bilingual educational system whereby indigenous children are able to attend schools offering both Spanish and their respective language. However, as we found in Cayambe, in practice the ability of many schools to effectively run a bilingual curriculum is limited by a lack of financial and human resources as well as political support.

² DIPEIB-P is the provincial bilingual office for Pichincha.

(UEM) initiative³ and publication on the DINEIB website.⁴ The project has continued to grow: Multimedia classes are now used to teach Kichwa to adults through a local NGO, *Centro de Investigaciones Interculturales y Desarrollo Ecológico Cultural Guanchuro*, with revenue raised to be shared with teachers involved in the project. Additionally, Microsoft Ecuador is in discussions with local members to see how they can utilise the multimedia material in their One Laptop per Child (OLPC) initiative.

Clear impacts and benefits were noted for a number of stakeholders. Students enjoyed increased awareness of, and interest in, their historical and cultural roots. Teachers were able to exercise greater agency over issues that had previously been considered beyond their capabilities, developing pedagogical repertoires to enhance Kichwa teaching and learning. Teachers also developed the confidence to approach and engage with government representatives. Outside the classroom, local people found the project materials far more accessible and engaging than traditional educational material. The creation of Kichwa workshops outside the classroom also demonstrated the increased interest and pride that families had for their local culture and language, which also led to increased self-confidence in other social and political arenas. Finally, the project was awarded the prize of most innovative educational material in the Ecuadorian national competition - *El Segundo Concurso Nacional Docentes Innovadores*.⁵

We consider *Mushuk Muyu* to be an example of social entrepreneurship as it sought to generate change (by creating social and cultural value) through the development and sale of its new language 'products.' As such, the project provided an immensely complex purpose and setting that threatened to overwhelm stakeholders.

³ UEM is an Ecuadorian government initiative to modernise schools and raise the calibre of education through the use of experimental and pedagogically innovative technologies.

⁴ See the DINEIB website:
<http://www.dineib.gov.ec/pages/interna.php?txtCodiInfo=193>

⁵ This competition was organised by Alianza por la Educación de Microsoft and Escuelas Inter@ctivas de Fundación ChasquiNet.

Social entrepreneurship as a challenging research setting

There are multiple understandings of ‘the social’ in social entrepreneurship: Many researchers consider the creation of social value as core to the concept (see for example Austin/Stevenson/Wei-Skillern 2006; Austin 2006; Nicholls 2006; Perrini/Vurro 2006; Weerawardena/Mort 2006; Jones/Latham/Betta 2008). Other scholars allude to ‘the social’ in social mission (Nicholls 2006), social objectives (Henry 2007; Tapsell/Woods 2008), social goals (Rhodes/Donnelly-Cox 2008), social aims (Haugh 2006), social purpose (Pearce 2003), and social transformation (Alvord/Brown 2002). Unfortunately, these ‘socials’ are typically treated either as an obvious quality that does not require explanation, or as an exogenous factor (Cho 2006).

For this paper, we build on the OECD Entrepreneurship Indicators Project definitions (Ahmed/Seymour 2008), with pragmatic definitions of the concepts as follows:

Social Entrepreneurs are those persons (key stakeholders) who seek to generate change (creating social, cultural or natural value), through the creation or expansion of economic activity, by identifying and exploiting new products, processes or markets.

Socially Entrepreneurial Activity is the enterprising human action in pursuit of the generation of change (creating social, cultural or natural value), through the creation or expansion of economic activity, by identifying and exploiting new products, processes or markets.

Social Entrepreneurship is the phenomena associated with socially entrepreneurial activity.

These definitions indicate why AR can be a valuable approach to research in the context of social entrepreneurship: Firstly, the multiple stakeholders and their multiple perspectives, objectives and opinions, will challenge a researcher. Secondly, in contrast to the typical commercial entrepreneurial project which can be evaluated by a profit and loss statement or balance sheet, the success of a social entrepreneurial initiative is difficult to measure and control (the generated value can be economic, social, cultural or natural). The numerous participants, dialogical processes and community contexts further raise the complexity of such value recognitions. Thirdly, social entre-

preneurship projects are not simple activism or lobbying, but include a commercial aspect of activity. Complex social exchanges, gifts and other transactions must coexist with the pecuniary flows of sales, donations and grants. Finally, the projects include the 'novel', whether that be introducing new products, entering new markets, or changing organisations' activities. Social entrepreneurs are change-makers, taking a different approach to the established players (whether they be NGOs, government agencies or commercial organisations).

'Traditional' or 'established' research methods and methodologies will not fit well with these complexities and inter-subjectivities. AR was initially proposed as an appropriate approach to study and activate the field of social entrepreneurship. Developing a framework for the perspective quickly became a focus of activity.

The perspective of action research

Researchers have for a long time recognised that traditional positivistic sciences provide inadequate tools for the resolution of critical social problems (Lewin 1946/1988; Berkowitz/Donnerstein, 1982) and that the artificial dichotomies of theory versus practice, and researcher versus researched (Borda 2006) do not typically result in the systematic development of practical knowing. The term 'Action Research' (AR) is widely attributed to Kurt Lewin (1946/1988). Influenced by the social philosopher Moreno and driven by the concern that traditional positivistic sciences were proving inadequate in the resolution of critical social problems (Susman/Evered 1978), Lewin developed his conception of research leading to social action. AR has grown into a science of praxeology, which brings together what Dewey (1930) argued was an artificial dichotomy of theory and practice, through a participatory democratic process that is concerned with systematic development of practical knowing.

Grounding researchers and subjects

Practitioners of AR have increasingly recognised the importance of grounding both researcher and subject in a participative and democratic relationship,

based on discourse that is open, reciprocal, and reflexive (Bradbury/Reason 2006). AR can be seen as a science of experiential qualities, moving away from the inadequate reductionism of an empirical-positivistic worldview. The combination of research, action, participation and self-reflection (Webb 1996; Zuber-Skerritt 1996) generates new forms of knowledge that help instigate change, both to solve real problems and to generate democratic changes in social processes (Greenwood/Levin 2007).

Unlike the sterile conditions of laboratory-controlled experiments, AR is dealing with social environments that are governed by complex relationships in which the generation of knowledge is always intersubjective and socialised (Schutz 1962). For researchers, this 'reality' is a messy place to work, leading to debate within the field as to whether a framework can be appropriate and practical for directing processes and their associated methods (Ebbutt 1985; Kemmis 1988; Elliott 1991; Hopkins 1993; Race 1993). AR does, however, promise rich insights for the complex settings associated with social entrepreneurship.

Undertaking AR in the context of social entrepreneurship

There are a number of issues that confront a researcher undertaking AR in the context of social entrepreneurship: Flexibility, complexity, and recoverability.

Firstly, flexibility is required because of social entrepreneurship's and AR's emphasis on participation and the cogeneration of knowledge through collaborative communicative processes (Greenwood/Levin 2007). AR is by its nature unpredictable, and its processes must remain flexible and adaptable in order to function effectively in different social settings. For this reason, Kemmis and McTaggart's (1988) earlier work has been criticised for the over-representation of AR as a series of fixed and predictable steps. For example, Hopkins (1993) warns of the dangers of representing in a pre-specified way what are essentially intended to be free and open courses of action. However, Elliott's (1991) argument for a more complex approach that engages the dynamic, unfolding and mutually reinforcing processes of AR is in danger of what Ebbutt (1985) highlighted were unduly complex frame-

works leading to mystification, rather than clarification. A balance must therefore be struck between the need for flexibility and the need for a workable framework.

Secondly, the action researcher is confronted by a vast (overwhelming) array of methods, compounded by the complexity of the phenomenon of social entrepreneurship. AR must be multi-disciplinary, multi-method, contextual and holistic, in order to “respect the multidimensionality and complexity of the problems people face in everyday life” (Greenwood/Levin 2007: 53). In this pluralistic landscape of AR, there are inevitably a vast number of methods that are available to any researcher. Researchers must maintain flexibility and adaptability when choosing and utilising methods, as it will become more evident which are effective and which provide few results over the course of the project. It is important to utilise quantitative, qualitative and mixed methods for data collection and analysis throughout the entire duration of the project. By utilising a variety of different methods, a framework should give the opportunity to gain a deeper understanding of the subjects involved in the project and will strengthen the validity of the projects findings (Tacchi/Slater/Hearn 2003). No single method should be used exclusively or independently, as individual methods will not provide an accurate enough picture of a particular social context. Instead, they need to be chosen and combined in a contextually sensitive manner to ensure that a wide range of information is obtained, and that an accurate portrayal of a particular social context, its problems, and particular solutions, can be made.

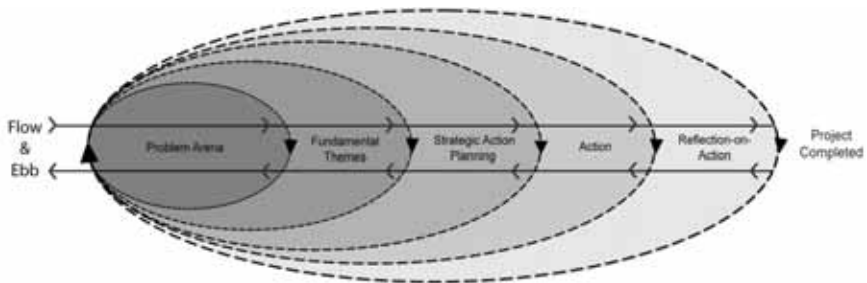
Thirdly, action researchers exploring social entrepreneurship must seek to ensure recoverability to enable the research processes to be replicated by interested outsiders (Checkland/Holwell 1998). The underlying concepts, methodological processes and assumptions must be made clear so that the procedures undertaken are made explicit and the AR process as a whole is transparent. Traditional scientific criteria emphasising replicability and generalisability are not applicable or a useful gauge of the environment AR processes take place in (Burns 2005). Knowledge derived from AR processes is contextually dependent and internally valid, and while it may hold utility in other social contexts, this knowledge does not hold true for all social contexts (Cook/Campbell 1976; Berkowitz/Donnerstein 1982). A process allowing

recoverability to be built into the methodology will offer greater opportunities for learning and insight into the context of social entrepreneurship.

Action Research Cycle (ARC) as an organising framework

Recognising the complexity of the task, and to address the above, we worked to develop a framework: the Action Research Cycle (ARC). This framework incorporates a hybrid methodology of ‘loose’ and ‘tight’ designs, the merits of which have been extensively illustrated by Miles and Huberman (1994). As can be seen from figure 1, there are two important components of this framework: the five episodes of the cycle, and the project dynamics of ebb and flow.

Figure 1: Action Research Cycle (ARC) & Project Ebb & Flow



Action Research Cycle

The ARC is based on a broad stream of literature (Schön 1983; Grundy 1988; Taba/Noel 1988; Schön 1991; Race 1993; Hall 1996; McNiff/Lomax/Whitehead 1997; Punch 1999; Cherry 2002; Tacchi et al. 2003; Kemmis/McTaggart 2005; Reason/Bradbury 2006; Greenwood/Levin 2007).

Episodes of the Cycle

We have identified five key episodes of an AR project that can guide researchers and participants:

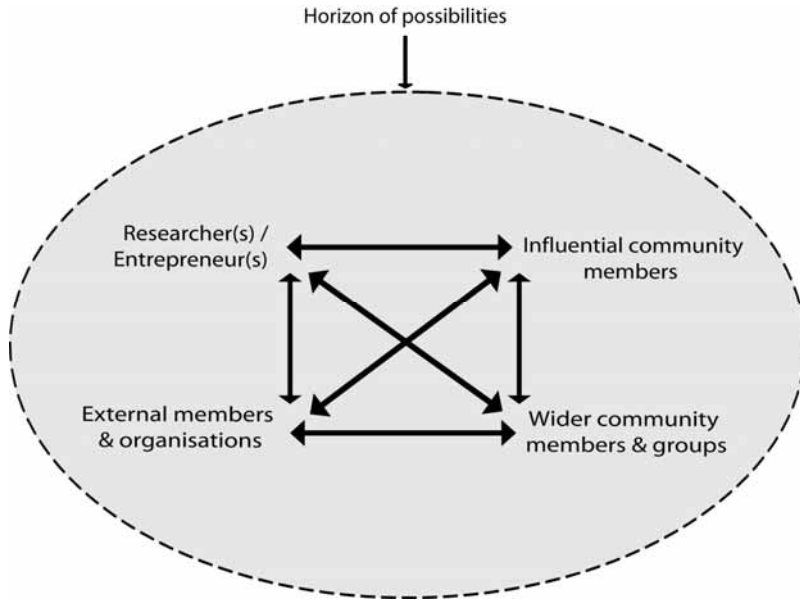
1. Problem Arena – initiate discussion and encourage communication of the issue confronting the participants in the communicative arena;
2. Fundamental Themes – organise the mass of information generated in the problem arena into themes, see the emerging relationship between problem(s) and actions;
3. Strategic Action Planning – start shaping strategies and creating an action plan to address the fundamental themes that have been brought to the forefront in previous discussions;
4. Action – actively implement strategies in order to transform the project from a set of ideas and themes into a functioning entity; and
5. Reflection-on-Action – review the way the project was carried out; the results and consequences of the action taken; the projected vision achievement(s); and the types, quality and sustainability of value produced.

Each of these five episodes of the ARC includes communicative arenas consisting of four key stakeholders: the researcher(s) and/or social entrepreneur(s); influential community members; the wider community members & groups; and interested external members & external institutions (such as universities, government departments, NGOs, etc). Each of these come together and work through the many possibilities open to them (refer to figure 2).

The communicative arena highlights that in many AR projects, there are active participants comprising different groups not necessarily from the community or set of communities in which the project is taking place. We avoid using the concept of “community” as a homogenous container of a discrete cultural unit, but instead acknowledge the embeddedness of different groups in any “community.” Participants will hold varying degrees of power and influence, and will bring differing perspectives, beliefs, values and knowledge to any project. An important objective of AR is, therefore, to foster open, collaborative and egalitarian communication between these participants (Ludema/Cooperrider/ Barrett 2006). This democratic co-generation of knowledge is an underlying feature of AR, and is concerned

with providing opportunities for all participants to contribute and actively influence their social and intellectual reconstruction (Kemmis 1988; Gustavsen 2006).

Figure 2: Communicative Arena of the five episodes of the ARC



The democratic process highlights the need for the cogeneration of knowledge and information through collaborative communication arenas, where all participants' contributions are taken seriously (Winter 1996; Greenwood/Levin 2003; Gustavsen 2006; Greenwood/Levin 2007). Rather than seeing the researcher's professional knowledge as superior to local knowledge, AR highlights that it is instead complementary, as "local knowledge, historical consciousness and everyday experience of the insiders complements the outsider's skills in facilitating learning processes, technical skills in research procedures and comparative and historical knowledge of the subject under investigation" (Greenwood/Levin 2007: 64).

It should also be noted that the channels of discourse between participants and groups in the communicative arena are artificial constructs, created by

the researchers in order to facilitate the project. This is important, as it highlights that a researcher is never able to examine a social sphere in its 'natural' context (his or her presence and the creation of the project inevitably changes that context of the participants' every day activities). This lends further support to the use of AR practices because they acknowledge the change of environment that a researcher inevitably induces, and thereby attempt to record how the presence and involvement of any researcher brings about certain changes in practices and behaviour.

Furthermore, the ARC episodes, and the communicative arenas of which they are comprised, do not refer to a specific point in time or space where all participants or community members come together to converse and ultimately move forward. This concept, while it would be ideal for AR, is highly unrealistic, as it fails to take into account the functioning of most communities (in which people have differing occupations, schedules, priorities, availabilities and resources). This is made even more difficult when external members and institutions are also involved. These episodes, therefore, represent geographies and time that transform with people's coming and goings. The researcher must be sensitive to the different community contexts and individual members. Each community will have differing degrees of social cohesion, political complexities and cultural diversities, and each member will have different schedules that will allow for participation and engagement.

The dynamics of ebb and flow

A constant dynamic throughout the ARC is the relationship between ebb and flow. Within and between each of these episodes, participants will grapple with their individual, as well as the project's, ebb and flow.

A sense of flow is usually experienced when perceived challenges are at an optimal level. By optimal, we mean when challenges stretch (but do not break) the abilities and skills of the participants. These challenges encourage the participants to persist at, and return to, an activity because of the promised rewards and the continual development and growth of their own skills (Csikszentmihalyi 1991). With a sense of flow, participants are completely

engaged in the task at hand, mastering challenges and continually developing greater levels of ability and skill. This is an optimal experiential mode that has the potential to drive participants to overcome foreseeable challenges and develop a successful project.

In contrast, periods of ebb may negatively affect and destabilise a project. These moments disturb the collective confidence of the project, impacting the momentum and work ethic. Events can initially have a negative impact on a project team if they feel that the challenge exceeds their capabilities. Momentum and enthusiasm can dissipate, with the whole process becoming stagnant to the point where the project may look as if it will collapse.

Ebbs and flows are symbiotic: They are not simply oscillating forces, but rather they are woven into one continuum (albeit one that is comprised of a complex layering of externally and internally generated interactions) that has the potential to influence perceptions, emotional states, behaviours, and rational constructions. The key is to address these issues and adapt and innovate accordingly. This may result in readdressing a particular episode and in the possibility of the project needing to be modified to take heed of new developments both externally and internally.

Throughout the ARC and relating to this ebb and flow, we identify three interrelated themes that indicate how the project ebbs and flows: 1) Reflection-in-Action, 2) Social Value Production, and 3) Projected Vision.

The term 'Reflection-in-Action' is typically ascribed to Schön (1983; 1991), and has proved to be an elusive category receiving much critical attention (see for example: Court 1988; Van Manen 1991; Eraut 1994), particularly for its undertone of instrumental reasoning (Van Manen 1991). However, the substance of reflexivity, such as feelings, emotions and thoughts, are naturally occurring processes which are integral to understanding the many ways participants may perceive the activities related to the project and the people they are dealing with. Therefore, participants should actively attempt to record their reflections in a medium that best suits them, for example through group or individual discussions, interviews, journals, questionnaire-based sample surveys, or an anonymous project log book open to all participants. Reflection-in-action allows for a continual assessment and reappraisal of the project, including its processes, its participants and its

environment. If a problem is identified, or if it is discovered that a particular issue was not recognised or sufficiently elaborated on, the researchers must revisit one of the previous episodes until they are satisfied that the issue has been resolved (refer to figure 1). If an issue is identified in the action episode, researchers may choose to return to the strategic action planning episode to alter the strategies, or alternatively, they could revisit the problem arena episode to redefine the problems the project is attempting to address. The revisiting of any episode depends on the insights gained from the reflection-in-action process, and will always be highly contextual and specific to particular projects.

Social Value Production is the process by which value is created and captured by, or shared with, the targeted social group. It should be recognised that there are different types as well as different layers of value that may be produced. Rather than narrowing the focus to overarching goals of systemic change, Young (2006) has developed a detailed framework of social value that includes social added value; empowerment and social change; social innovation; and systemic change. Young (2006) recognises that social values are dynamic and flexible in nature as they are inseparable from the social context producing them, and as such, are contingent on their negotiation and reappraisal. The importance of such a multilayered spectrum is that it recognises and enables different types of social value to be addressed and negotiated in relation to the project. The aim of this method of recording value throughout the course of the ARC is to emphasise that value creation should be seen both as the means and the end of the AR project, ensuring that benefits are gained throughout the different ARC episodes. Even if the AR initiative does not meet its overall 'objective' or achieve its 'social mission,' it will have created different forms of value along the way that may have an important impact on a community, and may be useful for shaping future initiatives.

As with social value, the grand themes or 'projected vision' that may be envisioned by the community and researchers are not static concepts, but should be continuously evolving. Therefore, constant feedback records what type of grand projected visions are envisioned by those involved in the project and how these themes are discarded, modified, or completely changed over the course of the project. Due to the complexity of interactions between

participants and the open-ended nature of AR, the vision and mission of a particular project must be flexible, as well as continuously open to reappraisal, evaluation and redefinition.

Each of these three themes can give insight into how a project ebbs and flows through the differing episodes of the ARC.

Episodes, flows and ebbs: Insights from an action research project

We will draw on the events and processes of our Andean-based project *Mushuk Muyu* in order to illustrate the dynamics of the five ARC episodes, and the project ebb and flows.

Action Research Cycle

The ARC episodes were all clearly identifiable and manageable within the project. The significance of the communicative arenas was also evident. For example, many community members we encountered were initially cautious and suspicious of our presence. They recounted previous situations where “outsiders” claiming some form of expert status had simply entered their communities to take photos, record data, and interview people, and left without explaining the purpose of their actions. In contrast, we focused on gradually building trust through a democratic research process that was transparent and open to all community members. As the project developed, we continually asked for suggestions and critiques from community members who were not directly involved. We actively engaged with the community as a whole, from living with local families and participating in community events, to helping with daily activities such as the milking of cows. This holistic approach recognises that each individual possesses unique and valuable knowledge about their communities, lives, experiences and aspirations. As such, the community members’ participation is integral to the successful generation of both knowledge and action in the AR process. Participation and input allowed for a thorough understanding of the contextual basis of the situation, as well as for ensuring that participants had sufficient understanding and control over the new processes. This will facilitate the continued use

of the ARC practices, ensuring that changes result in permanent shifts and transformations rather than temporary alterations.

Problem arena

The objective for us was to open up and strengthen the channels of communication between the participants comprising the communicative arena. This was an essential foundation enabling us to explore (through a process of discussion, negotiation and argumentation) the social dynamics and influences behind what different participants perceived to be the problems facing their communities. It also gave the different groups and participants an insight into what the others thought about the situation. This was especially important in breaking the previous situation in which limited communication and coordination between many of the participants and groups was evident.

We continuously adapted our methods to fit the ever-changing environment and found that attempts to use formal interviews were not well received by participants, and tended to hinder the flow of information due to their artificial nature. We learnt that while questionnaire-based sample surveys were not very useful for understanding the situation in depth, they were useful reference guides detailing the types of questions and themes we had discussed in the meetings for participants to take with them when they returned to their respective communities to speak with other community members. We also found that the informal medium of individual and group discussions and transect walks with community members yielded far richer and candid insights when discussing the possible problems associated with the state of Kichwa instruction in the educational arena and community at large.

This first episode highlights the complexity of problem definitions, and the disparate views, opinions and interpretations that different participants hold. The problem arena acknowledges that conclusions will not be reached with simple consensus, but instead that the process is dialectical, and that by opening up and connecting all those concerned through participative communication, an understanding of the various problems and their differing interpretations, may be reached. In this sense, we developed the general theme of education and stimulated an environment in which we gave voice to the many

contextualised issues and perceived problems that the different participants held. By observing how participants acted when they were alone or within small and large groups, we were able to see first-hand the dynamics of the power relations and struggles between participants and how this impacted the situation. This episode brought all the underlying issues, problems and power relations to the surface so that we could document them for future reference.

During this episode we found considerable apprehension to tackling a complex issue such as indigenous education, and there was initially a negative response from much of the community. Many perceived the challenges as too great for their present abilities or positions. While this initial atmosphere of ebb fostered a sense of futility and stagnation, it also helped to clarify the issues that had previously never been rigorously addressed by the community, and fuelled a sense of flow as certain participants saw that there was potential and value in expounding what exactly the major issues, challenges and needs of the community were.

A projected vision began to manifest as the potential for social value became clearer for many participants. This was possible through reflexively reviewing the dynamics of the issues that we had clarified and brought to the surface through the processes of ebb and flow.

Fundamental themes

Here, the participants aim to organise the mass of information generated in the problem arena into a coherent picture, identifying the thematic groups that underlie the many problems and concerns that were discussed. From a host of group meetings, ranging from two to sixty participants, we were able to gain a more holistic grounding of a matrix of issues that permeated the social discourse at the local level. While some thought the active use of Kichwa was important, but not essential, the majority thought the Kichwa language and culture was integral to affirming their autonomy in the Ecuadorian state. The general perception of the current situation was that most parents no longer had the ability to speak Kichwa or remember much of their histories. Even though some hinted that they thought Kichwa was simply a language of their grandparents and did not matter anymore, they did share a

similar feeling of shame regarding the loss of much of what previous indigenous activists had fought extremely hard to promote. There was a general consensus that the situation could be rectified through community-based Kichwa workshops and classes, and the majority of ideas focused on the creation of better material and practices for teaching the Kichwa language and culture at schools. This process also was very useful in teaching us first-hand the dynamics of the power relations between certain participants, the general suspicion of “outsiders,” the lack of faith in the government to provide adequate teaching resources, and how these affected the way people interacted with the above mentioned issues.

The fundamental themes established were the lack of government responsibility, general shame at the current loss of the Kichwa language and culture, and that while the role of the modern institution of primary bilingual education is central to the process of revitalising the language and culture, they are in desperate need of new and more innovative resources and practices to achieve this.

This episode helped the group to reinforce the major issues that connected many of the problem sets that had been raised and may have at first seemed disparate. It ultimately brought greater clarity and order to a mass of thoughts, perceptions and ideas regarding problem issues. This enabled the group to navigate through a large amount of information focusing on the emerging patterns that signified the fundamental themes and values, while discarding other issues that after further discussion and consideration were deemed to have little significance. The fact that these fundamental themes transcended any one piece of information gave them more weight, and ultimately, after lengthy discussion, interpretation, and negotiation, made them catalysts for a basic consensus. This was vitally important since it gave the group the momentum to move forward with the project in a coordinated fashion, while allowing each participant to express the particular way they perceived these fundamental themes and the impact they had on them and their communities.

In this episode there was a considerable amount of discussion and clarification of the challenges that we would face. To effectively address possible moments of ebb that had the potential to destabilise the morale of the group

and exaggerate internal conflict, we devoted our attention to long periods of discussion, negotiation and sometimes argumentation. This was an important process where we could navigate a host of emotional states relating to the issues, hurdles, and pressures that the project presented. It created a cathartic space where participants had the opportunity to express their concerns and views. A greater sense of flow only manifested within the group once we all felt that we were given the opportunity to express ourselves and directly shape the projected vision and the social values that would result from our actions.

Strategic action planning

The objective of the strategic action planning episode is to start shaping strategies and creating an action plan that addresses the fundamental themes that have been brought to the forefront in previous discussions.

This episode was initially stagnant as participants found it difficult to move from talking about the issues to actually planning strategies that they thought they could feasibly implement. It became apparent that the lack of formal training that the teachers had received and the fact they had never taken a leading role before, caused anxiety and low morale. Arguments frequently erupted and a feeling of futility led to the constant shifting of blame for the inadequacies of the educational system, where teachers blamed the MEE and parents, parents blamed the teachers and the MEE, and the MEE blamed the parents and teachers. This general reluctance to accept any responsibility meant no one was prepared to take action and attempt to change the situation.

We used a series of group workshops to instigate a movement away from simply discussing ideas into an arena in which the participants could start focusing on tangible outcomes through the coordination of activities relating to the development of the project. To help with this we brought in the idea of using audio technology to create classes in Kichwa. While the technology is not new nor is it particularly innovative, it was a novelty in the local context and acted as a trigger that opened up the horizon of possibilities for the group. This process stimulated an atmosphere of innovative and imaginative

thinking as the participants began to break from the status quo of their educational context.

This promoted one of the most creative periods in the whole project, as the group explored these new possibilities and began brainstorming ways in which the technology could be adapted and remoulded into a contextually relevant and culturally innovative product. They soon developed an idea that went well beyond anything we had originally thought of, as they modified the use of the technology to include a visual medium that would promote a better didactic learning environment and stimulate the capacities of both visual and auditory learning preferences. This whole process helped to shape an innovative and contextually relevant educational concept for Kichwa language instruction in the Cayambe region.

It was through the introduction of audio technology, that the group realised they now had the tools to develop something new, and could break from the constraints of their present context. The projected vision and potential social value at this point changed dramatically as the participant's horizon of possibilities expanded. The anxiety and fear of the failure to create change that had held the project in a state of ebb turned to flow as the participants began to create a radically different and innovative approach. It was the novelty of this approach to education and the creation of educational materials that manifested this flow, as participants realised that they were not just creating another version of existing materials, but something completely new.

Action

The action episode is primarily concerned with the active implementation of strategies in order to transform the project from a set of ideas into a functioning entity.

This episode was the most difficult and challenging since the group had to produce tangible outcomes and interact with government departments and various other bodies in order to expand the scope of the project. The more ownership the participants felt to the material and the project, the harder they were willing to work through the challenges. To help maintain momentum and avoid becoming overwhelmed, we found that setting clear achievable

(relatively short-term) goals was a good way to create a steady path forward. For us the goal of a launch date for a pilot version of the project consisting of one textbook and 12 multimedia classes, open to the members of the surrounding local communities, government officials and NGOs, was a pivotal moment in the project, and served a number of important functions: a) it acted as a focal point that all the participants could make a coordinated drive towards and therefore injected new momentum into the project; b) the launch gave the participants the opportunity to present the project as they had experienced it and to take responsibility and ownership of the work and the product; and c) It was an important reflexive platform that presented the project to the wider community and authorities in an open forum in which they could voice their opinions, suggestions and critiques regarding the work. It was also an opportunity for people who were unable or unwilling to join the team to provide some productive input.

The feedback from the many attending local community, NGO and government members and representatives clearly confirmed that the greater community was genuinely concerned about the state of Kichwa instruction in bilingual schools and were very passionate about the recuperation of their language, culture and history. They also emphasised the importance of stimulating interest in the youth with such an innovative form of educational material that combined the ancient oral language and culture with modern multimedia technology. Not only was staging a public event to present the project in pilot form an excellent way to gauge if the project was in fact reflecting the needs of the community and the situation, but it also allowed us to gain invaluable insights and suggestions from the wider community on how to further develop the project. The feedback, unlike that generated within the group through open discussion and reflective processes, came from people who were “outsiders” and had no vested interest in the work already done, and therefore was less biased towards the project. With community support and the financial support of DINEIB, we were able to deduce that we had created a unique and valuable educational resource. From this point on, we had the motivation and support to develop the project into one of national proportions.

As with the strategic action planning episode, we found that the anxiety and fear of not possessing the skills and capacity to create a project that could surpass the challenges made this episode extremely difficult to drive forward. Here, more than in any other episode, the expectations and feedback from external organisations and people had a direct impact on the morale and sense of ebb or flow that the group held. At this stage in time, the project was at a threshold of either collapsing under the weight of criticism or expanding rapidly if it was well received. For us the positive feedback reinforced the participants' belief in their abilities and further expanded the possibilities of the projected vision and the evolution of the prospective social values. Without this wider reflexive process and the resulting positive feedback the flow would have been drastically stunted and we would have had to readdress the project in light of the criticism.

It is important to note that particular actions had different impacts on different participants, which created numerous patterns of ebb and flow. For example, the launch justified and validated some of the participants' time and effort, and gave them renewed energy to move forward with the project. However, despite their satisfaction and pride in the launch and the materials produced, other participants saw this success as a de-motivating factor. Even though two participants felt they had achieved something special with the launch, their limited proficiency in Kichwa meant they had struggled to produce the material for the pilot, and they did not have the ability or energy required for scaling the project up to a level in which DINEIB could justify producing the material at a national level. Shortly after the launch they notified the rest of the group that they had decided to end their involvement with the project.

Reflection-on-action

The reflection-on-action (Schön 1983, 1991) episode is primarily concerned with the evaluation of four key variables: 1) the way the project was carried out; 2) the results and consequences of the action taken; 3) the projected vision achievement(s); and 4) the types, quality and sustainability of social values produced. We gauged the success of the project in relation to these

variables through the perspectives of the participants. To do this we decided to maintain a relaxed and casual atmosphere and primarily used group and individual discussion sessions and semi-structured interviews. Since the participants preferred discussion over writing or formal interviews, this was a far more conducive and natural platform for the participants to speak freely and candidly about their experiences.

Participants highlighted that group and individual discussions and workshops fostered a comfortable and casual atmosphere that had helped them to find confidence in their ideas and abilities to contribute to the project. It was also a time when the participants felt that the most innovative and productive ideas and activities were able to come to fruition.

As for the final product, they were very proud of what we had collectively achieved. The fact that we had created a set of multimedia classes that were innovative enough to gain the support of DINEIB and the wider community was indicative of the calibre of the project to address the problems in a new and effective manner.

For the members of the group the projected vision had been completely surpassed with the late inclusion of DINEIB's support and financing. While the projected vision had changed over the course of the project as we built momentum and gained more confidence due to the positive feedback from the launch, it had always maintained a grounded scope of local proportions. So the prospect of this project setting the agenda for the use of this educational technology at a national level was very satisfying for all concerned.

It was clear to the participants that in the wake of *Mushuk Muyu* new forms of value were being generated within the local communities. They had been contacted after the launch by some of the school directors and teachers who were increasingly thinking about the issues of the loss of Kichwa and were enquiring how they could get more material for their schools. One of the directors of the largest bilingual schools in the area was using our material to start teaching herself Kichwa. One of the participants also believed he had learnt valuable skills from working on the project and was putting them to use in both his political involvement and his new focus on teaching Kichwa at the preschool level. He was also taking the initiative in his community to raise awareness on the loss of Kichwa and had already begun to make

some very promising progress in motivating the parents to begin speaking more Kichwa in the home. In the community of La Chimba, some of the group members had also begun running a series of popular Kichwa cultural identity workshops. This was all spontaneously developing in, and self-generated by, the communities themselves. Even if the *Mushuk Muyu* material were not to be published, we believe that it would not have a serious impact on the sustainability of the residual value that was at first associated with the emergence of *Mushuk Muyu*, but is now independently manifesting in these community-based Kichwa revival initiatives.

At the completion of this stage, there are different paths for the researchers, participants and associated communities. If it is agreed upon during this process that the goals of the project have not been met, or that the processes have not been adequately understood, the ARC may overcome this momentary ebb and recommence at any of the previous episodes depending on the extent of the problem and build flow once again. For example, if the actions were deemed to have been ineffective the group may choose to return to the strategic action planning stage to reassess their strategies or, if they wish to redefine the problems in relation to events that may have encroached on the project or the emergence of new residual social values, they may start the whole cycle again. However, in our case the participants felt that we had finished the project and we felt that the project was in a state of flow and already functioning beyond our direct involvement with the support of DI-NEIB and the emergence of the community initiatives, and therefore we were able to end the cycle and leave the project.

The dynamics of ebb and flow

Clear dynamics of ebbs and flow were experienced in the project. There were frequent periods of flow, in which the project grew and advanced at a rapid pace.

An example of one critical ebb in the project related to the reaction of a very senior member of a key stakeholder who had originally publicly praised and pledged support for the project. In private, however, he took an increasingly negative and defensive attitude, later withdrawing all organisational

support as well as individual contact. Meetings with junior staff highlighted that the merits of the project were well known, but lack of seniority precluded any reappraisal of involvement. Further questioning revealed the director of the stakeholder organisation disliked that the project was an initiative created and driven by local community members and teachers, and that it had succeeded in creating an innovative and popular product where that organisation had failed.

All the participants expressed a sense of futility in continuing without the key stakeholder organisation's support. This depressed state fuelled and exacerbated internal conflict. These feelings were strong enough to affect the projected visions of the project. With the onset of such a tepid and unproductive atmosphere we all decided to put the project on hold so we could take some time to refresh and reenergise. At this point we were unsure whether the project would continue.

After this break, a strategy was devised to bypass the organisation at the provincial level and liaise directly with the national office. What had effectively derailed the project and held the potential to stop it altogether had stimulated us to take a giant leap outside normal protocol and develop the project on a much larger and ambitious scale.

Once again, the flow of the project returned, and the participants' engagement became stronger and more focused.

Reflections on method adaptability and fluidity

This project confirmed that the implementation of the ARC episodes acted as focal points that not only orientated the many activities, ideas and participating members, but also promoted a sense of stability and direction for the project as a whole.

Care was taken not to impede the creativity or freely evolving nature of the project by artificially 'pushing' between episodes, or announcing a new episode. Furthermore, we never specifically announced a method we wanted to attempt within an episode. We found that the participants were more comfortable with different methods when we managed to seamlessly join appropriate methods to the way activities and discussions were unfolding. For

example, when we were discussing ideas or generating problems we would simply begin writing them down with the group or begin asking which were the most pressing issues, and by doing so, we were able to create a natural entrance in the discussion for ranking or affinity diagram methods (Berkun 2005). This helped to break down any semblance of a researcher/researched subject relationship, and helped to give a more natural quality to methods as they were no longer perceived as simply research tools or unnatural activities, but as intrinsically important parts of the progression of the discussion or activity.

This approach also meant that our methods had to be flexible and we needed to adapt to the continually changing circumstances of the project. An example of this was when we spoke with local family members: As soon as we tried to take any form of notes we saw how uncomfortable they were with this. Once we put our pens and notepads away, the conversation became relaxed again and we were able to gain much more detailed and candid information about the community. In regards to note taking, using a Dictaphone or any type of structured interview was deemed ineffective and obtrusive, so we focused on utilising individual and group discussion where we were able to maintain an informal and natural atmosphere, and instead took notes in private, afterwards. It is important to recognise that few AR methods are set in stone – they can be altered and adapted to better fit the social context in which research is being conducted. Researchers need to be flexible and ready to adapt and adjust their methods, maintaining sensitivity to local, cultural and social conditions, as well as the particular dynamics of continuously shifting contexts.

Strengths and weaknesses of approach

As with any research methodology, there are inherent strengths and weaknesses that must be considered. Here we conclude with an outline of the principal strengths and weaknesses of AR in the context of social entrepreneurship.

Strengths

AR is dynamic and highly flexible with a wide range of methods that can be continuously adapted to suit the evolving context of a social entrepreneurial initiative.

Unlike the traditional scientific concept of non-interference, AR instigates complete interaction between researchers and participants, which enables researchers to gain a much more comprehensive understanding of the subjects and their environment. This research ethic also promotes democratic dialogue and information sharing where all participants are given the opportunity to discuss a wide array of issues and ideas, which in turn stimulates the collective development of innovative concepts and possible solutions to problems.

The fact that AR allows local participants to decide what the problem is, and shape the initiative in search of innovative solutions, ensures that a social entrepreneurial initiative is addressing the actual needs and wants of the local population, who drive and shape the initiative.

The equal participation of stakeholders ensures a greater sense of ownership and strengthens the prospect of their continued involvement in developing the project after the researcher exits.

AR is a very productive and pragmatic approach to social entrepreneurship as it attempts not only to understand the local situation and the participants, but also develops a solution to the problems identified by the participants.

Weaknesses

There is always a danger that AR can become overly subjective if researchers become heavily embroiled in what they are attempting to study. It is important that researchers maintain a balance between active participation and the ability to continuously assess the project objectively.

With so much happening and the researcher right at the heart of the situation, there can be a tendency to focus more on the action at hand, while sacrificing the development and documentation of good quality research data.

Even with complete transparency, the fact that all action is combined with the process of data collection for research purposes, the researcher may find it difficult to explain what the documentation and research is for, and why it is needed. This situation can be taxing on the relationship and has the potential to cause friction between the local participants and the researcher.

The lack of structure and rigidity inherent in what AR attempts to research can make planning of a project very difficult. You cannot have a strict plan with methods and steps to follow in an exact order, and results are more unpredictable and difficult to hypothesise. This means researchers have to be far more reflexive and take more time and care to document the way the project was carried out and the assumptions and epistemology they carried with them into the project.

Finally, AR can be a slow process and can seem quite inefficient precisely because it strives to offer all interested participants a chance to become involved and have an equal space to share their ideas, air their grievances and negotiate solutions. A by-product of this democratic discourse is that conflicts between participants, or between participants and non-participants, are inevitable and therefore participants may need to spend a considerable amount of time dealing with conflict resolution. While this is an important part of AR, it is an issue that many organisations, such as NGOs, government ministries, community groups, and universities, who often operate on tight budgetary/funding-led timelines, may find difficult to accommodate.

Conclusion

Social entrepreneurship is a complex and dynamic force that is difficult to study. Because of the complex and intricate nature of the social component, the methods used must be flexible and adaptable, and the researcher must be highly aware of the dynamic nature of the social environment where research is being conducted. AR, with its multi-disciplinary, contextual, holistic and flexible approach, is ideally suited for the study of this phenomenon. AR is not the appropriate method for all research studies, but for social entrepreneurial initiatives, particularly ones involving active local participation, AR can provide not only solid insight and knowledge generation, but also practical

solutions to the problems identified. This framework provides an appropriate scaffold to allow a researcher to manage the flexibility, complexity, and recoverability of an AR project in the context of social entrepreneurship.

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