

Becoming a Collaborative Scholar: A Metalogue

Journal of Management Inquiry
2025, Vol. 34(1) 126–135
© The Author(s) 2024
Article reuse guidelines:
sagepub.com/journals-permissions
DOI: 10.1177/10564926241249836
journals.sagepub.com/home/jmi



David Coghlan¹ , A.B. (Rami) Shani², and Jean Bartunek³

Abstract

In this article, the three authors, each of whom has been collaborating in various ways with practitioners for over 40 years, engage in a metalogue to explore their experiences of engaging in collaborative research. A metalogue is a reflective conversation whereby the mode of conversation mirrors the topic being discussed. In this illustration of a metalogue, the authors explore how they have developed as collaborative scholars. Both in the respective stories and in the metalogue the themes of being in a space of not-knowing, relevance and relationships emerged. The article offers an account of how the authors grew into their respective collaborative scholarship approaches, the key themes that emerged and of the metalogue process as a method for shared reflection on the practice of scholarship.

Keywords

discourse, values, organizational development

Introduction

As colleagues and friends for many years we have been meeting annually at the Academy of Management. At our meetings we have been aware that there are many overlaps in our fundamental interests, however differently they might be expressed. But we have not previously discussed them in any depth. One of us introduced the other two to Hansen and Madsen's (2019) book on theorizing in organization studies. In this book, several engaged (as well as esteemed) organizational scholars responded to Hansen and Madsen's question "What do you do when you engage in theorizing?". The said scholars reflected on their personal histories, who had influenced them and how their respective theorizing had developed over time.

Hansen and Madsen described the origins of the book in their conversations over coffee or a glass of wine where they discussed not only what they were working on, but also how they were working and what organizational scholarship meant in practice for them. They reported that these conversations opened up insights as to how academic work is carried out in practice, including how theorizing practices may differ from what appears in published scholarship.

Stimulated and encouraged by reading their book, the three of us decided to explore our respective approaches in our shared field of Organization Development and Change. Rather than focusing on theorizing per se, however, we decided to focus on *collaborative scholarship* both as something common and important to each of us in different ways, and as a collaborative initiative itself. Unlike Hansen and

Madden, given our physical locations, we had to do this by zoom and provide our own beverages.

The three of us have each been working as collaborative scholars for over 40 years, and each of us is reaching the conclusion of our careers. Over our careers each of us has explored the challenges of engaging in collaborative research, albeit in very different ways, to help in the creation of useful knowledge. Our aim here is that by sharing our reflections on our individual development as scholars and bringing this development into conversation we may provide a stimulus for scholars who share many kinds of interests, both in theory and practice, to engage in meaningful reflective conversations so as to deepen understanding of and receive insights into the processes of being scholars in whatever forms their scholarship may take.

We have structured this article as follows. First, we lay the foundations of our engagement as a metalogue. Second, we provide an account of our conversations and show how, from the conversations, the themes of not-knowing,

¹Trinity Business School, University of Dublin Trinity College, Dublin, Ireland

²Orfalea College of Business, California Polytechnic State University, San Luis Obispo, CA, USA

³Carroll School of Management, Boston College, Chestnut Hill, MA, USA

Corresponding author:

David Coghlan, Trinity Business School, University of Dublin Trinity College, Dublin, Ireland.

Email: david.coghlan@tcd.ie

relevance and relationships emerged as central to our respective development as collaborative scholars. Third, we reflect on the process we followed and offer what it might mean for scholars attending to their own development.

Metalogue

Gregory Bateson's (1972) *Steps to an Ecology of Mind* is a collection of his short works over the course of his career. It begins with a series of metalogues that take the form of conversations with his daughter. In the book, Bateson (1972, p. 1) defined metalogue as an inquiry process, a "conversation about some problematic subject" in which not only do the participants discuss the problem, but the structure of the conversation as a whole is also relevant to the same subject." The problems are not specific to a particular situation, but are large quandaries, such as "why do things get caught in a muddle," and "why a swan." As a form of reflective dialogue where the mode of conversation mirrors the topic being discussed, Bateson's metalogues (and the metalogues of those who have followed him) take place in the present tense and allow the voices of the participants in a conversation or dialogue to be valued and heard (Allen & Marshall, 2015; Coghlan, 2018; Coghlan & Shani, 2023).

The larger "problematic" situation facing us is that the three of us have valued and practiced collaboration with others in the pursuit of knowledge creation while attempting to impact practice and have recognized and appreciated the challenges in conducting such complex field work. We embarked on a metalogue to explore our individual experiences of being scholars involved in collaborative research and in doing so to engage in a form of collaborative inquiry as a way to gain deeper level insights into the collaborative process.

Introducing Ourselves

David Coghlan is a professor emeritus at the Trinity Business School at the University of Dublin, Trinity College, Ireland. He is known particularly for his work in action research, notably his book, *Doing Action Research in Your Own Organization* and as coeditor of the *SAGE Encyclopedia of Action Research*. His current book, *Edgar H. Schein: The Artistry of a Reflexive Organizational Scholar-Practitioner* captures his work on reflexivity.

Abraham B (Rami) Shani is a professor emeritus at the Orfalea College of Business at California Polytechnic State University, California. His work resides within the organization change and development knowledge domain with particular emphasis on action research, collaborative research and sustainability, notably his books *Learning by Design* and the co-edited volumes of *Collaborative Research in Organizations*, *Handbook for Collaborative Management Research*, and the

annual research volumes of *Research in Organizational Change and Development*.

Jean Bartunek is a professor at of Management and Organization in the Carroll School of Management at Boston College. Her work pertinent to this metalogue has focused in particular in academic-practitioner relationships, as indicated in her book with Meryl Louis, *Insider/Outsider Team Research*, her edited work with Jane McKenzie, *Academic-Practitioner Relationship: Developments, Complexities and Opportunities*, and her edited book that included contributions from both scholars and consultants, *Social Scientists Confronting Global Crises*.

Our Process

We held eight virtual meetings (over zoom) over a number of months. We recorded each meeting and produced written transcripts which helped in subsequent conversations. Round 1 comprised two meetings where we shared our intentions and our vision for our engagement with each other. We each then wrote an individual account of how we began the form of collaborative work in which we have been engaged. In round 2 we held three conversations in which we explored what each of us had written and explored what was emerging. Then in round 3, over three meetings, we reflected on the emergent themes of not-knowing, relevance and relationships as central in our experience and as themes we offer to other scholars who are reflecting on the development of their scholarship.

Round 1: Getting Started

In our initial zoom conversations, we explored our vision for our engagement and what attempting a metalogue might mean. We designed a process in which we would share in a round 2 meeting (and record our sharing) and then in the following meeting, aided by the transcript, would look to see if any themes emerged. We agreed that prior to the round 2 meeting each of us would write a short piece in the first person outlining our respective histories of how we began the form of action research related work in which we have been engaged. Then we would engage in a reflective conversation with one another beginning with what we had written and see where that would lead us.

Round 2: Telling Our Stories

In the period prior to this meeting, each of us wrote a personal account of our respective paths into our scholarship.

David: In 1997, I found that when being in a seminar room with senior executives exploring action research as a method of leading change in their organizations and of creating knowledge there was a paucity of materials on conducting action

research as an insider-manager. I wondered how I might engage with them as their academic teacher. My questioning took me in two directions. First, I wondered what it was like for the executives so that I could provide relevant and useful methodological frameworks for them. I listened to them and the issues they were identifying in their respective change initiatives. Examples of these issues were: being astutely political in building support (from superiors, colleagues, trade unions, customers, etc.) for what they were trying to do; managing their careers; dealing with writing a dissertation on what they were doing in their job; learning to understand their organizations through applying analytic frameworks and tools; and designing and leading change in their organizations.

Second, I sought what was in the literature that would address the challenge of engaging in action research as an insider, as the action research literature tended to emphasize external consultancy, such as, Greenwood and Levin's (1997) "friendly outsider." Evered and Louis' (1981) article on inquiry from the outside and from the inside, Torbert's (1987) and Fisher and Torbert's (1995) books on executive action inquiry were foundational, and I was greatly encouraged by accounts of people engaging in action research in their own organizations (Bartunek et al., 1993; Goode & Bartunek, 1990; Krim, 1988; Ramirez & Bartunek, 1989). I approached Sage with a proposal for a book, *Doing Action Research in Your Own Organization*, that was aimed at those who were undertaking action research in their organizations or communities, particularly for academic accreditation. The proposal was accepted and the first edition of *Doing Action Research in Your Own Organization* was published in 2001 (Coghlan & Brannick, 2001), followed by several subsequent editions the most recent one being published in 2019 (Coghlan, 2019) and with a sixth in the planning stage.

Doing Action Research in Your Own Organization gave voice to the practice of action research by organizational insiders that had struggled for legitimacy and which hitherto had not been framed in a manner that facilitated its place in the action research literature. From my continuing work with successive cohorts of the executive programs and through conducting doctoral seminars and MBA classes, I constructed a framework that engaging in insider action research involves attending to and managing preunderstanding, role duality, and organizational politics (Coghlan, 2019; Coghlan & Brannick, 2001, 2005, 2008, 2014). This framework has been impactful and insider action researchers have taken it up and applied it in doctoral and masters theses across business, organizational studies, healthcare, nursing, and education (Atienza, 2017; Bjorkman & Sundgren, 2005; Kenefick & Kirrane, 2022; Nyman et al., 2016; Roth et al., 2007).

As I reflect on the path of the development of my scholarship from 1997 to now, I can see how it began with my experience with the executives in 1997 where I felt inadequate to

the task at hand. I put my questions to the practical forum of hearing the concerns of the executives and to the theoretical forum of the literature. Both affirmed the validity of the questions I was asking and pointed to the need for a framework that would address both practice and theory of doing action research as an insider. After 20 years of observing and documenting practice, teaching and speaking about it, writing articles and books, I have been engaging in what Kaplan (1998) has described as "advanced implementation" (Coghlan, 2023). Kaplan presents an action research cycle of (i) observing and documenting practice, (ii) teaching and speaking about it, (iii) writing articles and books, (iv) implementing the concept, and (v) moving to advanced implementation. In my development over the 40 years I have been influenced deeply by the work of Ed Schein whose reflexive approach to the practice of his scholarship has shaped my understanding and practice (Coghlan, 2024).

Rami: Following a year sabbatical at the Stockholm School of Economics and engagement in collaborative research in two projects, I was invited in 1995 to be part of a team that would design and lead an executive PhD program—the FENIX Program. The program was based on a partnership between two universities, The Stockholm School of Economics and Chalmers University of Technology, and five companies with headquarters in Scandinavia for the purpose of enhancing executive development and generating new knowledge. One of the program's aims was "... educating persons who can act both as management researchers and as practicing managers" (Hart et al., 2004, p. 103). (For more details about the program see Hart et al., 2004; and Adler et al., 2004.) The experiences of thinking through the essence of collaboration with executive doctoral students, faculty colleagues and the five companies' executives in the different industries about what would make such a program attractive and relevant led to a partnership that lasted 20 years. The initial conversations with managers in the companies helped all parties appreciate the potential added value of the research projects and of the merit of high level of engagements in the process.

The early conversations about ways of collaborating within the faculty team, with key managers in the five companies, and with some potential doctoral students took me in a few new directions. *First*, appreciating the strengths and weaknesses of traditional research paradigms and of action research paradigms triggered a reflective process centering on the issue of can we develop a research orientation that truly meets the needs of the diverse parties, each of which with different goals, language, and desires. My early and rigorous training fit the mode 1 research paradigm as the only way to conduct research (see Gibbons et al., 1994) for the formulations of modes 1 and 2 research orientations. Yet, the more I engaged in traditional research practice—and prior to the FENIX experience—the more I began to question the organizational relevance of the mode 1 research

orientation. Following the exploration of sociotechnical systems, experiential learning, and action research paradigms via four different research projects, I began to formulate insights about the action research process. Quality of relationships was a key pillar in the action research process model (Shani & Pasmore, 1985). At the core of the experiences were my discoveries that new forms of collaboration—such as research teams composed of members that represent a microcosm of the organization, internal, and external researchers—yield new knowledge and simultaneously addressed key organizational issues.

Second, the challenge and impact of managerial engagement with researchers became central for me due to my engagement in the FENIX program. Specifically, I began to explore the issue of whether it is possible and what will it take to develop a true collaboration between managers and researchers and in what ways such collaboration is likely to impact the discovery process. This central theme led to a stream of research projects (see for example Canterino et al., 2016; Coghlan & Shani, 2008; Roth et al., 2007; and Shani et al., 2023).

The *third* issue that emerged for me had to do with the challenge of meeting the perceived “hard core” academic legitimacy—“is it possible to build legitimacy for a PhD program that is imbedded in an alternative research paradigm in two very traditional institutions.” The academic legitimacy developed over time. As the academic communities in both institutions learn more about the nature of the research projects, as papers began to appear in national and international conferences and published in respected journals and as doctoral defense sessions began to take place in each institution (in Scandinavia, the dissertation defense event is a public event and anyone can attend), the more acceptable the program has become. At the same time, the continuous influence of the mode 1 research paradigm orientations in organizational studies and academic journals gate-keepers continued to challenge anything but mode 1 research-based contributions.

Ten middle level managers from the five companies, identified by the companies as high level executive potentials, were accepted as the first cohort. Addressing some of the questions listed earlier, a core tenet of the program was true partnership between the participants. Collaborative learning circles within companies, within the universities, between the universities and companies, and between the universities and external funding agencies were established. Colleagues from around the world were invited to be a part of the program via guest seminars, lectures, dissertation committees, and participation in some of the projects as senior academics. Some of the colleagues included Armand Hatchuel, Mike Beer, David Coghlan, Victor Friedman, Harvey Kolodny, Sue Mohrman, Bill Pasmore, and Mary Walshok.

I began to frame the research orientation that was emerging as *collaborative management research*. We created a team of internal and external members to serve as the

mentors and coaches for each candidate. The team included the immediate supervisor, a manager that was two levels above the candidate, senior and junior academics and one other peer PhD candidate. The PhD candidates’ research projects addressed “red and hot topics” within the management, organization, and innovation knowledge domains that were of interest to both the companies and the external researchers. Collaboration in each project was viewed as one of the guiding principles of the program and played a key role in the co-framing and re-framing of each project, the research design, and implementation and dissemination of results. Over the last two decades, 62 individuals completed the PhD, over 250 articles and five books were published and, most individuals were promoted within their companies (or other companies) to top level positions. Two milestone books that captured and built on the collaborative experience were published, *Collaborative Research in Organizations* (Adler et al., 2004), and *The Handbook of Collaborative Management Research* (Shani et al., 2008).

Jean: As background to this conversation, I had been teaching an MBA level organization development course where I had the students carrying out action research interventions in their organizations. Several of these had been published (e.g., Bartunek et al., 1993; Goode & Bartunek, 1990; Ramirez & Bartunek, 1989). That work was a precursor to what I will talk about here.

In addition to teaching, I had conducted standard mode 1 research in two organizations, my religious order and a manufacturing facility. There I had developed a theoretical model of organizational change that was based on conflicting understandings of a change and how leaders “held” or “dismissed” the conflicting understandings (e.g., Bartunek, 1984; Moch & Bartunek, 1990). I wanted to test this model in another organizational setting.

In the mid-1980s I was able to gain access to a private school that was undergoing a change for a study I hoped would enable me to do this. The type of change the principal of the school envisioned was toward coordination among educational units rather than the autonomy between them that had been characteristic for years. Coordination was to be accomplished through the creation of a new academic director position that replaced a previously established curriculum coordinator role.

The school had had difficulty for the previous 15 years with the curriculum coordinator position and with coordination in general. Turnover in the position had been high, and the people who held the role felt they had not succeeded. They attributed their lack of success to a pervasive sense in the school that the various academic units were autonomous. The principal designed the new position so the academic director would have much more control over coordination efforts than the curriculum coordinators had had.

Thus, I saw what was going on as, in part, involving conflict between two perspectives: autonomy and coordination.

To conduct the study, I administered questionnaires at the beginning and end of the school year. I also visited the school and conducted interviews every 2 to 3 weeks over the course of the school year. I talked with the principal and academic director each time I went to the school, and I talked with different school personnel regularly. By standard academic criteria, this was a well-designed study. It led to multiple journal articles (e.g., Stevenson & Bartunek, 1996) and book chapters (e.g., Bartunek & Reid, 1992) and an edited book (Kolb & Bartunek, 1992).

Over the course of the school year, the change was not going well, and there was increasing conflict between the principal and academic director. At the end the school year, there was a pervasive sense among top administrators that, in the words one of them used, “nothing had changed” concerning coordination in the school. The academic director felt isolated and ineffectual, and the administrators felt that the implementation of the position had not accomplished its aims.

I wanted to continue the study the next school year, and I requested permission from the principal to do this. However, she said no. At the beginning of the study, I had clearly said (and gotten agreement) that I would be writing about the events, and the principal had been enthusiastic about that. However, it emerged that the reason she had been enthusiastic was that she had assumed that the new position would be a success, and she wanted the success documented. Why would I want to write about a failure? In addition, she told me that my ongoing interviewing of the academic director had caused the academic director to be too self-centered, and that had been one of the reasons for the problems she had had in her position. I was upset about this, and tried to convince the principal, without success, that I should be allowed to return to continue the study.

Initially I framed this outcome as “I am terrible.” I thought about what I had done. I then wondered about the right of participants in something studied to have a say in the story told about them. Meryl Louis had recently moved to the Boston area from California, and we had become friends. We often talked about our work. Thus, I was familiar with a paper in the *Academy of Management Review* that Roger Evered and Meryl Louis (1981) had published, based on their experience when they moved to the Naval Postgraduate School together from the University of Illinois, that described how insiders to a setting and outside researchers typically inquired in different ways about the setting.

I had dinner one night with Catherine Lacey, a friend who was beginning her dissertation at the Harvard Graduate School of Education. Catherine told me about a group that she and Diane Wood, another friend of hers, were planning to start in the network of schools of which they had both been a part for several years. (While I knew Catherine well, I did not know Diane, who lived in a different city

and was an administrator of a high school.) The group, to be called the Network Faculty Development Committee (NFDC), was aimed at fostering the empowerment and personal development of experienced teachers in the Network. Catherine was very enthusiastic about the group, and thought she would like to study what happened to it as her dissertation. However, the Harvard faculty rejected the possibility of someone studying something she was also creating.

It occurred to me that although Roger and Meryl had only focused on differences between insiders’ and outsiders’ modes of inquiry, it might be possible to combine both modes in a study. It might make sense, in other words, for insider members of a setting (such as Catherine and Diane) to collaborate with an outside researcher (such as me) to study what was going on in an organizational change effort carried out by setting members. I suggested this idea to Catherine and passed on the Evered and Louis (1981) paper to her. Catherine suggested the idea to Diane, who eventually thought it might work if the NFDC members agreed to it, which they did.

Catherine, Diane, and I wrote an early article about the group (Bartunek et al., 1992). Meryl and I subsequently wrote a paper (Louis & Bartunek, 1992) and then one of the Sage qualitative methods books (Bartunek & Louis, 1996), in which we sketched out primary defining characteristics of insider/outsider team research and explored how it has been implemented in several fields, including organizational behavior, education, and community psychology. We described it as a research method in which insiders to a setting and external researchers collaborate through a study to tell a scholarly story about the setting, a kind of collaborative action research approach. Members of the group and I wrote a few papers together. I also wrote papers with Bob Krim (Bartunek et al., 1999), Pennie Foster-Fishman, and Chris Keys (Bartunek et al., 1996) and others in which we used this approach. The research and collaboration I do is closer to Mode 1 than the approach used by David and Rami. However, it is a much more collaborative approach to this type of research than others employ, and is aimed at helping insiders reflect on their own situations in new ways (e.g., McKenzie & Bartunek, 2023).

Our Reflections From the Three Accounts

Upon reflection on our original sharing, we became aware that each of us had told a story of a time when something important happened that changed the way we had been used to operating in terms of teaching and/or research that involved others as potential collaborators, whether we were aware of it at the time or not. These episodes had evoked experiences of feeling disappointed/confused/upset, especially at experiences that did not work as well as we had anticipated.

The episodes had also led to the subsequent pursuit of questions, such as: How can an insider conduct action research? How can such research be rigorous and relevant? How might outsiders and insiders work together in some way? How do we develop collaborative relationships? Can different forms of collaborative relationship be designed? These in turn had led to further questions and, eventually, the articulation of answers to our questions and significant publications which in turn had extended their dissemination and developed them.

Round 3: Finding Emerging Themes

Having heard each other's stories and pondered the transcripts, we posed the following question "Is there anything emerging as common from our respective stories?" We recognized three themes across the individual accounts of our developing scholarship that we could explore further in the metalogue. These were our sense of not quite knowing what was the best path to follow in our engagement with practitioners, our concerns about the relevance of our work to practice, and our concerns about relationships with and among practitioners. We explored these themes in our subsequent conversations.

Theme 1:

Our engagement with practitioners and our sense of not-knowing.

David: One of the things that struck me that's common across our three stories is that each of our stories begins with an engagement with practitioners and a sense of not knowing what to do. You had the school, Jean. I had the executives in my course and, you, Rami, you were also engaging with executives. Evered and Louis' (1981) AMR article was foundational for all three of us as it opened up the perspective and dynamics of both insider and outsider inquiry.

Rami: As my desire to engage in this form of research was evolving, I felt a lot of legitimacy-based pressure from senior professors at both academic institutions (Stockholm School of Economics and Chalmers University of Technology) and my home university (California Polytechnic State University) about the scientific merit of collaborative research orientations. The way that we opted to deal with the increasing pressure was to integrate into the program leading colleagues from other academic institutions into different roles and to support publications in leading journals. Over time we built a community of scholars, senior executives and action researchers. Few of the early dissertations included papers in top journals.

David: This "precursor" work of yours, Jean (Bartunek et al., 1993), was very significant for me in the early 2000s. It gave me practical examples of insiders undertaking action research in their own organizations and confidence in what I was attempting. It set me on a path and I assigned that publication as reading material and still do.

Rami: For me, the insider's challenges and dynamics, coupled with the insider and outsider research teams, were emerging through the research projects. We had to be relevant in order to sustain the commitment by our partner companies. Jean, the work that you have done with Meryl (Bartunek & Louis, 1996) was instrumental in shaping the research projects, composition of the research teams, framing, the inquiry processes and mechanisms. Building the support of the external scholarly community became critical.

David: I worked primarily on my own as the only OD/AR person in my school and probably in Ireland. When you, Rami, drew me into the FENIX program I became part of your wider community and led me on to this new path that decreased my not-knowing.

Rami: The excitement was generated from the community that was evolving, the richness of the collaboration, the relationships that we were developing and in the feeling that we were being relevant as a collective. Yet, being in the not-knowing space, created the energy and commitment to explore and experiment with different ways of organizing, plan and execute the projects and the collaborative relationships. It connects to what Jean said earlier about the relationships that we developed with the individuals that we worked with. The overall sentiment in the community was that we had an impact on the systems and as well as in the generation of new knowledge. Collectively this has generated endless synergy for me.

Jean: David, you used the word "path." It's not just one event, but it's a path but where I felt inadequate to the task at hand. So, I think one of the things that clearly is an issue in each of us feeling inadequate in some way. And coming up with something that would work. Feeling inadequate is not something that is always recognized in standard scholarly writing.

David: If something doesn't fit and puzzles me, I struggle to find an answer. What on earth am I going to do about that? That's an inadequacy. But then I'm wondering, is this the drive, the drive to know, to move from where I am from the experience to seeking understanding. There's an inadequacy there. Otherwise, it's not a problem. I've solved it immediately or whatever. Is feeling inadequate like being in a "not-knowing" space?

Rami: The deeper feeling of inadequacy, of not-knowing, not having a clear path and the willingness to set in motion and trust the emergent process serves as a trigger for the collaborative discovery process.

David: Are we in a not-knowing space in this metalogue? The threshold concepts people talk about the "not-knowing" as a liminal space, but I don't know of others who do (Meyer & Land, 2006). We are hoping to get to something beyond our individual stories but don't know how to get there.

Rami: Our feeling of inadequacy is in the here and now. The three of us don't know how it will evolve or what will happen next. Yet we are trusting the collaborative process.

Jean: Maybe, somehow, it's connected to the having faith that something larger than us will evolve, which I think is the theory behind the metalogue as distinct from just a conversation.

Finding ourselves in a not-knowing space is what we each experienced at the start of our individual development as scholars and also now in this metalogue.

Theme 2:

Relevance

What is also common across our individual stories is that we were engaging with practitioners and so relevance to their practice was to the fore. As we engage in this metalogue, the question of how it is relevant to our colleagues who are reading it is pertinent.

Jean: What do people think of as relevant? They never think in terms of personal relationships at how respected somebody feels, they never talk about it like that. They talk about whether a scholarly paper is relevant. They don't talk about whether the person on the other end feels dismissed. They totally ignore the kinds of feelings of the people in the setting studied. But my experience is that relevance is also related to why people sometimes feel how they feel. They are sometimes angry afterwards with qualitative interviews because they think they've shared their soul with somebody and then it gets a cursory, look in a publication. So discussions of relevance have left off the relationship dimension. I think David that what you're doing when you're promoting action research, you're saying "you the insiders are capable of doing something in your own organization, and I trust you to be able to do that." I think, Rami, in the example of the academic legitimacy struggle you're saying, you know that you can do collaborative research involving managers and academics and you can make it as good as a finance dissertation.

Rami: At FENIX we were challenged to be relevant to the firms and to demonstrate an added value to the scientific community simultaneously. We pushed ourselves into the not-knowing space about the "how" to design and facilitate such an inquiry process and manage its implementation in real time and space with and within living systems.

Jean: It is interesting to revisit discussions in the literature about relevance because I think you're raising a very important point in terms of what people talk about. People talk about relevance as the output of scholarly work, but not necessarily the process of the engagement. I think that's important.

David: And not knowing or not feeling inadequate.

Jean: That is relevant. Yes.

Theme 3:

Relationships

Jean: Any time you talk about some sort of collaboration by definition you're talking about relationships, but I think, David, even when you talk about insiders intervening in their own organization that's fundamentally a relational process. Relationships are fundamental in my work. What

is relevant in a classroom is how students feel about themselves. We give them cues about what is good and bad. Relationships are fundamental to any process of scholarship.

Rami: Relationships and working to develop systems have been pillars in my work. My scientific path in this domain was triggered in the two action research projects that provided the empirical data-base for my dissertation in which we theorized about the context within which relationships evolved, the impact of the quality of the relationship on the action research process, and the impact that they generated in the development of the human system (Shani & Pasmore, 1985). David, the quality of relationships also has been the core of our collaboration for the last two decades.

David: In our respective accounts of our history relationships are central.

David: When I'm working with insiders doing action research in their own organizations, that's a relational process. And obviously your insider-outsider is a relational process, Jean, and Rami, your collaborative management research is explicitly a relational process.

Rami: When I skim through the synopsis of our conversations, relationship and the quality of relationship comes to the surface. It appears to be a common thread throughout. In some ways it is connected to the level of engagement around the challenge of being relevant. It also seems to be connected to impactful change orientation. So, in some way, we are connecting relational and relevance perspectives. It's the developmental process which is relational.

David: You're saying relationship is enhanced by relevance or we're saying it's more related directly. If you're working on something that's relevant does that do something to the relationship?

Rami: We tend to collaborate because we are intrigued about creating something together. We are committed to having an impact. If there was no emotional excitement and some kind of connection at a deeper level around being relevant and or creating something new we probably would not engage.

David: And that's presumably in our stories as well.

Reflections From Our Conversations

The three themes of (initially) being in a not-knowing space with respect to our approaches, relevance to practice and relationships with and among practitioners emerged from our individual stories, our shared reflection on, and inquiry into our stories and in the metalogue process itself. These are issues that are not discussed very much with regard to organizational scholarship. However, for academic researchers, at least, these are all likely to be present as issues, whether consciously articulated or not. Our metalogue suggests that the dynamics between relevance and relationships are essential in nurturing the inquiry process and that attending to being

in a not-knowing space as part of the development of our scholarship in engaging in collaborative research.

Being in a Not-Knowing Space

We have described how being in a liminal, not-knowing space was the catalyst for how we each moved forward on our respective work and how in this metalogue we found ourselves in the same space. Accordingly, we invite scholars to attend to the experience of disconfirmation with its accompanying sense of anxiety and through conversation explore ways of moving forward.

Relevance

For each of us our work emanated from our respective engagement with practitioners and our efforts to meet their concerns and to create useful knowledge through our teaching, consulting, and publications. In the metalogue what we explored were processes that were relevant in our individual work and which emerged as relevant for exploring our scholarship. We offer this insight to scholars to attend not only to the outcomes of their work, but also to the importance of their reflective conversations.

Relationships

Each of us has discussed work we did *with* practitioners, rather than *on* or *for* them. In our metalogue we built a relationship which enabled us to engage in an open reflection that was both challenging and supportive. We offer the creation of such relationships as a catalyst for enhancing the understanding of what it is to be a scholar.

The Metalogue Process

What of the metalogue process? Within a metalogue, sharing the stories of our individual development as scholars and bringing the same challenges that we faced into the present tense provides a mirror for scholars to both attend to and receive insights into their own development and to engage meaningfully in the community of scholars.

As we introduced earlier, a metalogue is a “conversation about some problematic subject” in which not only do the participants discuss the issue but the structure of the conversation as a whole is also relevant to the same subject” (Bateson, 1972). As we progressed through the above exchanges, at no time did we know what would emerge next or where the metalogue would take us. By providing the voices of our individual thinking and of our reflective conversation, we intended this article be itself an exercise in reflection and an expression of the role reflexive conversation plays in the development of scholarship (Cutcher et al.,

2020). It also provides an expression of the process of reflecting together as we explore our academic foundations, theoretical orientations, and common interests within the larger action research community.

A metalogue is one form of the type of the relationally reflexive practices advocated by Hibbert and his collaborators (e.g., Hibbert et al., 2010; Hibbert et al., 2019), practices that MacIntosh et al. (2021, p. 10) describe as “the process of critical self-questioning which facilitates the production of the self as the impactful research instrument” and that facilitate our learning from tensions that arise in the academic processes in which we are engaged. Such reflexivity is grounded in systematic conversations and honest dialogue between scholars with the aim of both addressing change and research orientations and creating shared insights from experiences. A metalogue process is a particularly useful joint reflexive practice; it provides a platform for sharing, enabling discoveries from the sharing, the development of themes, and the creation of new meaning.

Concluding Reflections

Spurred by Hansen and Madsen’s (2019) book on theorizing in organization studies, the three of us took the opportunity to put our intention to write something together by exploring the development of our scholarship on a theme that is common to each of us, namely engaging in collaborative research. That we acted on this stimulus at a meeting of the Academy of Management is relevant, as this annual meeting is an occasion where the community of scholars assembles to share experiences and ideas and advance individual and shared scholarship. We adopted the method of the metalogue so as explore openly for readers how our respective paths related to scholarship and practice began and developed and how in our reflective conversation, we found the same common themes present.

As we shared our individual stories and identified the emergent themes of being in a not-knowing space, relevance, and relationships as significant in the development of our respective scholarship, we found that these three themes were present in our conversation and were acting as forces in our shared inquiry. While we are not postulating that the same three themes would necessarily emerge in the development of all scholars we are offering the metalogue process as a mechanism for identifying significant learnings that could benefit scholarship. We are asserting the value of attending to the foundations of one’s scholarship and enhancing membership of one’s academic community through reflective conversation, and understanding this kind of sharing may be helpful for many scholars and practitioners.

Declaration of Conflicting Interests

The authors declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

Funding

The authors received no financial support for the research, authorship, and/or publication of this article.

ORCID iD

David Coghlan  <https://orcid.org/0000-0003-3741-9959>

References

- Adler, N., Shani, A. B. (Rami), & Styhre, A. (2004). *Collaborative research in organizations: Foundation for learning, change and theoretical development*. Sage.
- Allen, S., & Marshall, J. (2015). Metalogue: Trying to talk about (un)sustainability—a reflection on experience. *Tamara—Journal for Critical Organization Inquiry*, 13(1-2), 1-13. <https://hull-repository.worktribe.com/output/380091>.
- Atienza, C. M. (2017). Building organizational identity: An insider action research from a founders' viewpoint. *Systemic Practice and Action Research*, 30(6), 569-592. <https://doi.org/10.1007/s11213-017-9410-2>
- Bartunek, J. M. (1984). Changing interpretive schemes and organizational restructuring: The example of a religious order. *Administrative Science Quarterly*, 29(3), 355-372. <https://doi.org/10.2307/2393029>
- Bartunek, J. M., Crosta, T. E., Dame, R. F., & LeLacheur, D. F. (1993). Managers and project leaders conducting their own action research interventions. In R. T. Golembiewski (Ed.), *Handbook of organizational consultation* (pp. 27-36). Marcel Dekker.
- Bartunek, J. M., Foster-Fishman, P. G., & Keys, C. B. (1996). Using collaborative advocacy to foster intergroup cooperation: A joint insider-outsider investigation. *Human Relations*, 49(6), 701-733. <https://doi.org/10.1177/001872679604900601>
- Bartunek, J. M., Krim, R., Necochea, R., & Humphries, M. (1999). Sensemaking, sensegiving, and leadership in strategic organizational development. *Advances in Qualitative Organizational Research*, 2(1), 37-71.
- Bartunek, J. M., Lacey, C., & Wood, D. (1992). Social cognition in organizational change: An insider/outsider approach. *The Journal of Applied Behavioral Science*, 28(2), 204-223. <https://doi.org/10.1177/0021886392282004>
- Bartunek, J. M., & Louis, M. R. (1996). *Insider/outsider team research*. Sage.
- Bartunek, J. M., & Reid, R. D. (1992). The role of conflict in a second order change attempt. In Kolb & Bartunek, (pp. 116-142).
- Bateson, G. (1972). *Steps to an ecology of mind*. Ballantine.
- Bjorkman, H., & Sundgren, M. (2005). Political entrepreneurship in action research: Learning from two cases. *Journal of Organizational Change Management*, 18(5), 399-415. <https://doi.org/10.1108/09534810510614913>
- Canterino, F., Shani, A. B. (Rami), Coghlan, D., & Brunelli, M. (2016). Collaborative management research as a modality of action research: Learning from a merger-based study. *The Journal of Applied Behavioral Science*, 52(2), 157-186. <https://doi.org/10.1177/0021886316641509>
- Coghlan, D. (2018). Edgar Schein at 90: A celebratory and exploratory metalogue. *The Journal of Applied Behavioral Science*, 54(4), 385-398. <https://doi.org/10.1177/0021886318801279>
- Coghlan, D. (2019). *Doing action research in your own organization* (5th ed.). Sage.
- Coghlan, D. (2023). Developing the practice of scholarship: The case of insider action research. *Malaysian Journal of Action Research*, 1(1), 4-10. <https://doi.org/10.61388/mjar.v1i1.2>
- Coghlan, D. (2024). *Edgar H. Schein: The artistry of a reflexive organizational scholar practitioner*. Routledge.
- Coghlan, D., & Brannick, T. (2001). *Doing action research in your own organization*. Sage.
- Coghlan, D., & Brannick, T. (2005). *Doing action research in your own organization* (2nd ed.). Sage.
- Coghlan, D., & Brannick, T. (2008). *Doing action research in your own organization* (3rd ed.). Sage.
- Coghlan, D., & Brannick, T. (2014). *Doing action research in your own organization* (4th ed.). Sage.
- Coghlan, D., & Shani, A. B. (Rami). (2008). Collaborative management research through communities of inquiry: Challenges and skills. In A. B. (Rami) Shani, S. A. Mohrman, W. A. Pasmore, B. Stymne, & N. Adler (Eds.), *Handbook of collaborative management research* (pp. 601-614). Sage.
- Coghlan, D., & Shani, A. B. (Rami) (2023). Creating and building shared scholarship in organization development and change: A metalogue. In D. A. Noumair, A. B. (Rami) Shani, & D. Zandee (Eds.), *Research in organizational change and development* (Vol. 30, pp. 73-94). Emerald.
- Cutcher, L., Hardy, C., Riach, K., & Thomas, R. (2020). Reflections on reflexive theorizing: The need for a little more conversation. *Organization Theory*, 1(3), 1-28. <https://doi.org/10.1177/2631787720944183>
- Evered, M., & Louis, M. R. (1981). Alternatives perspectives in the organizational sciences: "Inquiry from the inside" and "inquiry from the outside". *The Academy of Management Review*, 6(3), 385-395. <https://www.jstor.org/stable/257374>
- Fisher, D., & Torbert, W. R. (1995). *Personal and organizational transformations*. McGraw-Hill.
- Gibbons, M., Limoges, C., Nowotny, H., Schwartzman, S., Scott, P., & Trow, M. (1994). *The new production of knowledge: The dynamics of science and research in contemporary societies*. Sage.
- Goode, L. L., & Bartunek, J. M. (1990). Action research in under-bounded settings: The example of an apartment complex. *Consultation*, 9, 209-228.
- Greenwood, D., & Levin, M. (1997). *Introduction to action research*. Sage.
- Hansen, A. V., & Madsen, S. (2019). *Theorizing in organization studies: Lessons from key thinkers*. Edward Elgar.
- Hart, H., Kylen, S. F., Norrgren, F., & Stymne, B. (2004). Collaborative research through an executive Ph.D. Program. In N. Adler, A. B. (Rami) Shani, & A. Styhre (Eds.), *Collaborative research in organization: Foundation for learning, change and theoretical development* (pp. 101-116). Sage.
- Hibbert, P., Callagher, L., Siedlok, F., Windahl, C., & Kim, H. S. (2019). (Engaging or avoiding) change through reflexive practices. *Journal of Management Inquiry*, 28(2), 187-203. <https://doi.org/10.1177/1056492617718089>

- Hibbert, P., Coupland, C., & MacIntosh, R. (2010). Reflexivity: Recursion and relationality in organizational research processes. *Qualitative Research in Organizations and Management: An International Journal*, 5(1), 47-62. <https://doi.org/10.1108/17465641011042026>
- Kaplan, R. S. (1998). Innovation action research: Creating new management theory and practice. *Journal of Management Accounting Research*, 10, 89-118.
- Kenefick, D., & Kirrane, M. (2022). A little less conversation, a little more action: Participatory insider action research in an executive team. *Systemic Practice and Action Research*, 35(4), 453-469. <https://doi.org/10.1007/s11213-021-09580-x>
- Kolb, D. M., & Bartunek, J. M. (Eds.). (1992). *Hidden conflict in organizations: Uncovering behind-the-scenes disputes*. Sage.
- Krim, R. (1988). Managing to learn: Action inquiry in city hall. In P. Reason (Ed.), *Human inquiry in action* (pp. 144-162). Sage.
- Louis, M. R., & Bartunek, J. M. (1992). Insider/outsider research teams: Collaboration across diverse perspectives. *Journal of Management Inquiry*, 1(2), 101-110. <https://doi.org/10.1177/105649269212002>
- MacIntosh, R., Mason, K., Beech, N., & Bartunek, J. M. (2021). *Delivering impact in management research: When does it really happen?* Routledge.
- McKenzie, J., & Bartunek, J. M. (2023). Mirror, mirror outside my wall: Reflexive impacts of insider/outsider collaborative inquiry on the insider researcher. *The Journal of Applied Behavioral Science*, 59(4), 714-739. <https://doi.org/10.1177/00218863231177486>
- Meyer, J., & Land, R. (2006). *Overcoming barriers to student understanding: Threshold concepts and troublesome knowledge*. Routledge.
- Moch, M. K., & Bartunek, J. M. (1990). *Creating alternative realities at work*. Harper & Row.
- Nyman, V., Berg, M., Downe, S., & Bondas, T. (2016). Insider action research and a method—exploring institutional encounters from within a birthing context. *Action Research*, 14(2), 217-233. <https://doi.org/10.1177/1476750315600225>
- Ramirez, I., & Bartunek, J. M. (1989). The multiple realities and experience of internal organization development consultation in health care. *Journal of Organizational Change Management*, 2(4), 40-57. <https://doi.org/10.1108/09534818910134086>
- Roth, J., Shani, A. B. (Rami), & Leary, M. (2007). Facing the challenges of new capability development within a biopharma company. *Action Research*, 5(1), 41-60. <https://doi.org/10.1177/1476750307072875>
- Shani, A. B. (Rami), Coghlan, D., Paine, J., & Canterino, F. (2023). Collaborative inquiry for change and changing: Advances in science-practice transformations. *The Journal of Applied Behavioral Science*, 59(4), 541-555. <https://doi.org/10.1177/00218863231204372>
- Shani, A. B. (Rami), Mohrman, S. A., Pasmore, W. A., Stymne, B., & Adler, N. (Eds.). (2008). *Handbook of collaborative management research*. Sage.
- Shani, A. B. (Rami), & Pasmore, W. A. (1985). Organization inquiry: Towards a new model of the action research process. In D. D. Warrick (Ed.), *Contemporary organization development: Current thinking and applications* (pp. 438-448). Scott, Foresman and Company.
- Stevenson, W. B., & Bartunek, J. M. (1996). Power, interaction, position, and the generation of cultural agreement in organizations. *Human Relations*, 49(1), 75-104. <https://doi.org/10.1177/001872679604900104>
- Torbert, W. R. (1987). *Managing the corporate dream*. Dow-Jones Irwin.