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PRACTICE PERSPECTIVE

Critical Realist Action Research and Humanistic Management Education

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Abstract In line with its institutional commitments and in order to strengthen the relevance of its business education program in addressing the persistent social challenges facing the Philippines, Mission University (not its real name) revised its Master of Business Administration (MBA) curriculum in 2012. A core change in the curriculum was the incorporation of action research training and the requirement for graduation of implementing and defending an action research project. The introduction of action research, which is based on critical realist philosophy of science, was intended to enable the university's MBA graduates to become reflexive and humanistic agents of change in their work contexts through the application of observation, critical reflection, collaborative analysis and action and scholarly skills. The implementation of the action research requirement is beginning to yield positive results based on the types of projects implemented by the students and their resulting sense of efficacy in the workplace. Challenges in implementation include the need to further hone student skills in pursuing more emancipatory projects and the need to further orient faculty in the critical realist philosophy underlying action research, as distinct from traditional positivism.

Keywords Humanistic management, management education · Insider action research · Critical realism

Introduction and Background

> "*Power tends to corrupt and absolute power corrupts absolutely. Great men are almost always bad men, even when they exercise influence and not authority; still more when you superadd the tendency of the certainty of corruption by authority.*" – Lord Acton (1834–1902) (Lord Acton Quote Archive 2017)

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> "*... Successful leadership depends upon a fundamental shift of being, including a deep commitment to ... dream and a passion for serving versus being driven by the pursuit of status and power....*" – Jaworski 1996, p. 94)

The contrasting quotes from Lord Acton and Jaworski above highlight the tension associated with the relationship of power and position with the personal character of the occupant of such a position. The Acton thesis, or the tendency of power to bring leaders over to the "dark side" as depicted by Darth Vader in the highly popular Star Wars science fiction movie franchise, has been supported by revelations related to the behavior of business leaders who led their companies to ruin within the last two decades. Jaworski, in contrast, refers to a higher calling for leaders to pursue a vision of service. How can business leaders learn to prudently navigate the path of professional growth without falling into the destructive temptations of abusive power?

Graduate management education was originally conceived as a path to socially responsible business leadership (Khurana 2007). However, business schools have been receiving increasing critique from various observers that these schools have not been effective in turning out business leaders with the desire to make a positive difference in their organizations and in society in general (Bennis and O'Toole 2005).

This paper is a narrative case study on the experience of Mission University (not its real name) in reorienting its Master of Business Administration (MBA) program towards the formation of business leaders who can be humanistic change agents in business organizations. The approach the university took was to introduce critical realist action research (Coghlan and Brannick 2010) into the MBA curriculum as a mode of reflective learning and of initiating positive and collaborative change in the workplace.

The paper is structured as follows: In this first section, the worrisome environment of scandal and irresponsibility that has emerged in the world of business especially since the turn of the century is described, and the urgent call for business schools to form reflective and socially responsible leaders. The social context of the Philippines is then briefly presented, with its myriad challenges and persistent inequality despite continuous economic growth. The section closes with the institutional direction of Mission University to be a transformational influence in the country's social situation, particularly through the quality of its graduates, research, and social engagements. The review of related literature provides the academic context for the curriculum reform in the MBA program in the areas of humanistic management education, reflective insider action research, and critical realism. Finally, in the last section, the implementation of the action research curriculum component and an illustrative student action research project are described. The paper closes with a summary of lessons learned, enduring challenges, and prospects for future improvements in implementation.

The Crisis of Business Leadership and the Role of Virtue

The twenty-first century has been notable for the sheer frequency and scale of business collapses and scandals, affecting large portions of entire economies and populations. Prominent, and often admired, business leaders have figured as main actors in these debacles, although often not facing the consequences of their actions. In some cases, notably in Western developed countries, the elite's easy access to the financial sector for wealth enhancement has shielded them from some of the most egregious financial collapses which have devastated

ordinary employees. Several business bankruptcies at the turn of the century, for example, showed how less than transparent financial manipulations involving the elite led to stock price appreciations which eventually collapsed – causing job losses for thousands while keeping the wealthy relatively unscathed. Importantly, these corporate collapses frequently involved MBA graduates from notable business schools.

Enron Corporation, one of the most recognized and largest US companies at the turn of the century, was led by two MBAs from top schools: Jeffrey Skilling from Harvard Business School as CEO and Andrew Fastow from Kellogg School of Management as CFO. After the spectacular collapse of Enron, both executives went to jail for their role in the company's financial practices. Fastow admitted that: "When you misrepresent the nature of your company, when you artificially inflate earnings, when you improperly hide losses, when you do things like that to cause your stock price to go up, that is stealing" (McLean and Elkind 2006). Tragically, Clifford Baxter, vice-chairman of the Enron board and MBA graduate of Columbia Business School, committed suicide soon after the company's collapse (BBC News 2002).

The company's ruin was mainly due to grossly imprudent financial maneuvers which were cloaked in secrecy (McLean and Elkind 2006; Stein 2007; Teehankee 2011). Cruver (2002), an employee at Enron during its final year, observed that "greed … pushed Enron to ignore the very same risk strategies that it was preaching to the world [and led it] to ignore – or even punish – the messengers of bad news" (p. xv-xvi).

More recently, leaders of major investment banks which collapsed during the financial crisis of 2008 became highly public examples of callousness as a notable number of them (e.g., Richard Fuld, former CEO of Lehman Brothers) showed little remorse that their decisions led to the loss of tremendous amounts of capital and jobs while they themselves were personally enriched. Rep. Waxman, who chaired the investigation committee, was astounded at Fuld's testimony that he had made only $350 million and that he did not seem to acknowledge doing anything wrong (Moore 2008).

Fuld's behavior stands in stark contrast to the behavior of Toyota president Akio Toyoda, whose behavior after he was appointed to preside over the recall of millions of Toyota vehicles in the US (after a series of lethal accidents involving the company's cars) was closer to the thesis of Jaworksi above. Toyoda publicly wept as he admitted the missteps of the company which led to the safety issues. In one of the more striking public admissions of a CEO of a major company in recent years, Toyoda explained his reflection on the situation during his testimony to the US Congress:

> We were not able to stop, think and make improvements as much as we were able to before, and our basic stance to listen to customers' voices to make better products has weakened somewhat. We pursued growth over the speed at which we were able to develop our people and our organization … I regret that this has resulted in the safety issues described in the recalls we face today, and I am deeply sorry for any accidents that Toyota drivers have experienced. (Toyoda 2010)

The polarities in managerial character exemplified above can be analyzed in terms of virtue and vice. Drawing on classical writings on virtue, Alford and Naughton (2001, p. 81) explained that "a virtue is the *habitual use of effective means toward a good end*". Toyoda's behavior is closer to the practice of virtue or good moral habit while the recklessness without remorse typified by Richard Fuld or the greed at Enron would be examples of bad moral habit or vice.

Pursuing virtue entails sensitively reflecting about the goodness of one's behavior as means to specific good ends and asking oneself whether there is a strong linkage between such means

and ends (Alford and Naughton 2001). From a humanistic point of view, virtue entails orienting action towards one's flourishing and the improvement of the quality of life of others (Spitzeck 2011).

The Need for Management Education for Reflective Virtue

The level of reflective skill required for developing virtue among managers has not been the focus of management development. Management education practitioners have become more aware of the need to inculcate a reflective mindset among managers. Mintzberg (2004) has been one of the most vocal critics of traditional management education – exemplified by the ubiquitous MBA program – which he refers to as tending to form "calculating managers" (p. 95). He refers to the MBA as "management by analysis"; and elaborated that an obsession with facts based on "hard data" of the past can cause a more categorical than nuanced perspective, fatally reducing complex realities to simplistic measures (p. 101).

In the wake of the 2008 Global Financial Crisis, Mintzberg (cited in Holland 2011) further intensified his critique: "Many of our current economic and financial problems are due to the mess we have made of management and management education. What we have today is not a crisis of mortgages, or a crisis of finance or the economy. It's a crisis of managing. The economists aren't going to solve this problem because the problem is in the destruction of enterprises through mismanagement" (p. 100). Some *mea culpas* have come from business school leaders themselves. Jay Light, former dean of the Harvard Business School, admitted that business schools must share responsibility for the financial crisis and its negative impact on the economy (Holland 2011, p. 96).

As a practical response to what they saw as critical flaws in management education, Mintzberg (2004) and his team at McGill University have implemented a management development program which they called International Masters in Practicing Management (IMPM). The program, designed to be an alternative to the traditional MBA, aims to develop five mindsets, namely: reflective, analytical, worldly, collaborative, and action. The first module focuses on the reflective mindset to encourage true wisdom and he quotes Lao Tzu who said that "knowing others is intelligence; knowing yourself is true wisdom" (Mintzberg 2004, p. 299).

Mintzberg (2004) explained their basic approach as developing a reflective mind; how they cope with the stresses of being a manager; and how they learn from experience to be more discerning (p. 300). He reported that many participants of the reflection module (which extended over two weeks) have found it a life-changing experience. This was consistent with the intention of the IMPM program to develop more thoughtful, balanced, and wiser managers.

Berggren and Söderlund (2011) have examined the role of various experiential action learning strategies for management development such as reflection reports, learning contracts, roundtable examinations, live cases, action-oriented thesis work, and organizational knowledge theaters. They found that action learning approaches constitute a powerful means of addressing the need for developing reflective skills among managers although it comes with challenges.

Some management educators have attempted to re-orient their teaching approaches towards having more impact on making the world more humanistic. Bloom and Pirson (2011) described such an approach focused on introducing students to social entrepreneurship which they defined as "the process of providing innovative solutions to pressing problems caused by government or market failure" (p.250). The curriculum of the Social Entrepreneurship

Collaboratory (SE Lab) established at Stanford and Harvard aimed to give students opportunities to address social problems of their choice, provide students with resources for social entrepreneurship and engage students in co-creating a learning environment for mutual support and sharing of ideas.

The SE Lab course combined team-based project learning, content inputs, planning sessions, and reflection assignments based on student experiences. The reflection assignment asked students to explain how their experiences affected or changed their thinking about their project and their perspectives or ideas. Student testimonies showed the feasibility of action-oriented curricula in tapping student passions for social change. Many student projects were successfully implemented. While some projects did not reach fruition, students found the SE Lab as a transformative experience which made social entrepreneurship a viable career option and made the accomplishment of personal visions a feasible possibility.

Philippine Social Challenges and the Role of Management Education

The role of management education in the Philippines – and the potential contributions of humanistic management education – can be better understood in the light of the country's perennial social challenges.

The Philippines has a population of more than 100 million and is one of the fastest growing economies in Southeast Asia. Much of the growth is driven by business activity (especially in the strong service and consumer sectors), remittances from overseas Filipino workers and the burgeoning financial markets. Unfortunately, the country also has one of the most persistent poverty challenges, estimated at around 25% of the population. Even this national figure is misleading since in a few parts of the country the poverty is above 50% (Ordinario 2013). Part of the problem is that more than 60% of Filipino workers are in various vulnerable working conditions (International Labour Organization 2012).

With economic growth moving at a healthy pace, it has become an urgent concern that this has not translated to broader prosperity for more Filipinos. Habito (2012), former director of the National Economic Development Authority (NEDA), lamented that "we have an 'oligarchic' economy where the bulk of the nation's wealth and income is in the hands of a few." He estimated that 75% of the country's wealth gains were equivalent to the wealth increases of the richest forty families of the country. Indeed, among more than half of the top 100 publicly-listed Philippine corporations in 2009, at least 50% of the shares were owned by one family or individual. In 83 of these companies, more than 35% of the shares were owned by one family or individual (AIM-Hills Program on Governance 2009). The country's newly-elected president, Rodrigo Duterte, won partly on the strength of campaign promises to address poverty and to rein in the elite.

Villanueva (1997) explains the structural problem of inequality in the Philippines as a case of social extraction. Because of considerable resource surpluses, the elite group is able to maintain and improve its economic situation through time, relative to the non-elite group – especially labor. Villanueva (1997) explains the basic mechanism of social extraction as using political competition in "effectively resisting policies leading to meaningful land reform and the strengthening of labor market institutions (particularly the wage-bargaining process on behalf of workers). Because it owns the major portion of the capital stock, the elite accounts for most expenditures on political competition to augment capital income through the extraction of a portion of labor's marginal product" (p. 4).

Social extraction is, therefore, a process of transferring a portion of what should have been the share of workers and employees – fair wages due to their contribution to productivity – to the already wealthy who can, in turn, use such extracted wealth to earn even more wealth through capital appreciation via business ownership and control or through investments in the capital markets. In the case of business ownership and control, the elite are able to accomplish this only with the competent assistance of technically trained business managers – often from the top business schools of the country.

Thus, it was essential for Mission University to review how it was forming MBA graduates who could be positive agents of change through business leadership in addressing the myriad social challenges faced by the country.

The Directions of Mission University and Implications for its Business Curriculum[1]

Mission University is a private Catholic university under the leadership of the Catholic Missionaries (not its real name) congregation. This is a Roman Catholic religious teaching congregation, founded in France by one who is now a saint, and which now has its Mother-house in Rome.

The establishment of the first Mission school in the Philippines was initiated by a letter from the Archbishop of Manila to the Superior General of the Catholic Missionaries in 1905 which implored them to send a group of Mission religious to open parochial schools in Manila.

Mission College was established in Manila in 1911 and has been associated with business education ever since. It granted its first Commercial High School Diploma in 1915 and opened a two-year Commerce curriculum in 1920. The School of Commerce opened in 1922 and it conferred its first Bachelor of Science in Commerce in 1931. The Graduate School of Business began offering the Master of Business Administration in 1960. This was the period around which American business education was going through sweeping curricular revision towards more emphasis on quantitative analysis and scientific management knowledge which began in the 1950s extending to the 1960s. The same influences took hold in the Philippines, slowly eroding the faith-based inspiration for the early years of the school (Teehankee 2013).

A decade later, when the College turned University in 1975, the emphasis on education for professional leadership and employment became increasingly pronounced. Quality assurance, accreditation, and, thereafter, faculty research and publishing became dominant preoccupations, further diluting any faith-based orientations that may have lingered within the business school.

The following decades saw a steady growth in the university, its research endowments and its physical assets. However, despite the continuous growth of the business sector in the country and the steady output of business graduates from the university and 15 other Mission schools around the country, the Philippines has remained plagued with persistent poverty and social inequality. In the late 1990s, as the institution approached its 2011 Centennial, the Catholic Missionaries began a review of how faithfully school programs were serving the congregation's mission.

One of the early promoters of greater social relevance and faith orientation in the business school was the dean of the Graduate School of Business in 2002 to 2008. Encouraged by the

[1] This section draws heavily from Teehankee (2013).

dean's direction for the business school, the first seminar on Catholic Social Thought (CST) for the faculty teaching the basic MBA management course was organized in 2006. In his introductory remarks to the seminar, the lead formator of the Philippine Mission District (who is a Catholic Missionary), explained that when educators teach only specific areas of knowledge, graduates tend to use these knowledge and skills to exploit and oppress others; and so Mission educators educate the whole person, not a dichotomized one.

In 2004, the leadership of the Catholic Missionaries in the Philippines re-emphasized its educational identity as a Catholic school through the release of its Guiding Principles of the Philippine Mission Family. In this document, the Catholic Missionaries' core values of *Faith*, *Zeal in Service*, and *Communion in Mission* were re-emphasized. In particular, the core value of Faith called on members of Mission schools to think and feel about, and thereby, act on the social issues that impede the Catholic social vision: believers must see reality in the light of the Gospel; that this must move us to contribute actively to the fulfillment of God's saving plan; and that this Faith enables us to accomplish what is demanded by each situation.

Also in 2006, the administration, led by the Catholic Missionaries, renamed the business school after an outstanding alumnus, entrepreneur, business leader, and former ambassador to several countries. The alumnus remarked during the naming ceremony: "Our mission is not to produce MBAs. … It is to produce the managers and business leaders with the passion and commitment to help millions of Filipinos out of poverty into lives of dignity and well-being."

The United Nations Principles for Responsible Management Education (PRME) presented an opportunity for the business school to both expand its international profile and deepen its Mission commitment to management education for social responsibility. The university became a PRME signatory in 2009. Beginning academic year 2011–2012, the new directional statement that the university adopted became: "A leading learner-centered research university, bridging faith and scholarship in the service of society, especially the poor."

The university established a new management department during its 2011 Centennial to be the "heart and soul" of the College of Business and thereby emphasize socially responsible management education. The department's vision is "to be a leading academic department that bridges faith and management practice through values-based management education and research geared towards promoting integral human development and sustainable value-adding organizations." Thus, the stage was set for the curriculum changes in the MBA program.

Review of Related Literature

Humanistic Management Education

Management educators interested in making a positive contribution to a more socially responsive business climate need to examine the emphases of business school curricula. Reforming inadequacies in business curricula is a fundamental step in this regard (Amann et al. 2011).

Revans was an advocate of the practical learning approach to management education and an early critic of what are now common technical and analytic features of MBA programs (Pedler and Burgoyne 2008). He was the first professor of industrial management at the University of Manchester in 1955, a post he held until 1965. At that time, Revans anticipated that his methods would be adopted by the university's new business school. But as British management education sought academic recognition, Revans' action learning approach –

which is not reliant on expert knowledge – did not fit the emerging paradigm which was then being imported from the US. This experience may have shaped Revans' low opinion of the emerging business school model, prompting him to coin the phrase "Moral Bankruptcy Assured" as the meaning of MBA (Pedler and Burgoyne 2008, p. 321).

In his critique of leading US MBA programs, Navarro (2008, p. 108) summarized the ideal MBA curriculum as having the following: a curriculum built on a foundation of multidisciplinary and integrative problem-solving; experiential exercises aimed at real-world problem-solving and student-centered learning; emphasis on the learning of soft skills such as communication, leadership, negotiation, interpersonal adeptness, and teambuilding; a global perspective and information technology focus; and ethics and corporate social responsibility.

After evaluating the leading US MBA programs, Navarro concluded that "today's MBA curriculum remains far from the ideal identified in the prescriptive literature (p. 116)". In particular, he noted that very few of the schools included an experiential component in their pedagogy. Rice University, one of the few exceptions, requires an Action Learning Project where students create a project, gather data, conduct interviews, and perform analyses in order to present the results to the senior management of the company in question.

Amidst the growing frequency of business scandals and their accompanying public harms, the United Nations Principles for Responsible Management Education (PRME) program was initiated in recognition of the significant role that business schools play in promoting responsible management behavior through various educational programs. More than 500 business schools around the world have joined PRME, with Mission University joining in 2009.

Spender and Kraaijenbrink (2011) explain the importance of humanizing management education. To them, humanism seeks "a subjective anthropocentric attitude, a way of looking at the world from a point of view that might help us better comprehend the human condition and its possibilities" (p. 259). Distancing the humanistic approach from both positivism and interpretivism, they argue that humanism goes beyond knowledge as an instrument and instead goes deeper into questions of why we choose the objectives we apply knowledge to, then making the main focus "our experience of being in the world and what we might learn from that to better the human situation" (p. 259).

On this point, Spender and Kraaijenbrink (2011) emphasize human agency as a foundational principle of humanism. People continuously construct their worlds and themselves and have the option to make action choices that can make a difference in the world even if the effects cannot be completely determined. They explain that "the key to the humanist model of the individual is her or his ability to act responsibly in under-determined circumstances" (p.267).

Spitzeck (2011) categorizes business schools along four different stages in terms of humanistic management education: defensive, compliance, strategic and civil (p. 419). Business schools at the defensive stage have the "Not our job" mindset and so lack course offerings on sustainable and responsible management. Their teaching focus is on traditional neo-liberal economics and the pursuit of profit maximization. For these schools, a good manager is one who can be cost-effective, efficient and concentrates on the financial bottom-line.

On the other hand, business schools at the compliance stage have the "We adhere to standards" mindset and aim to manage reputational risks by joining initiatives which are visible to critics such as the PRME initiative. These schools also offer business ethics and social responsibility courses but these are considered as add-ons and not of equal importance to the profit-maximizing courses. Business schools at the strategic stage adopt an "It differentiates us in the market" mindset by pursuing a social responsibility branding and training students to pursue social responsibility to generate profit.

Finally, business schools at the civil stage have the mindset that "We want to improve the human quality of life." Thus, these business schools "see business education as leverage for human value creation and social transformation" (Spitzeck 2011, p. 417).

Action Research

A promising approach to managerial virtue development because of its reflective consideration of means and ends is insider action research (Coghlan and Brannick 2010). This type of action research is carried out by members of organizations instead of by external change agents as in other types of action research (Bradbury and Reason 2015).

Action research[2] may be defined as an emergent (i.e., not wholly planned) inquiry process in which applied behavioral science knowledge is integrated with existing organizational knowledge and applied to solve real organizational problems. Action research aims to bring about change in organizations while developing self-help competencies (including critical reflection skills) in organizational members and adding to scientific knowledge. Finally, action research is a continuously evolving process undertaken in a spirit of collaboration and co-inquiry by stakeholders (Coghlan and Brannick 2010).

Coghlan and Brannick furthermore describe the "individual reflective study" (Coghlan and Brannick 2010, p. 106) as a particularly helpful type of action research for developing reflective managers. They describe reflection as "the process of stepping back from experience to question it and to have insights and understanding with a view to planning further action" (p. 24). Virtue-oriented action research of this form, therefore, would mean that the manager will be doing research on himself and his actions. By closely observing how he acts and reflecting on his motives (ends) and behaviors during such action (means), this can help in improving awareness and commitment to improved virtuous action in the future.

The development of virtue among managers in positions of power seems to require systematic reflection in order ensure that the manager's behavior does not lead to bad moral habit and instead lead toward good moral habit. It also helps promote internal coherence between a manager's espoused values and his actions by avoiding the "overactivity trap" (Jaworski 1996, p. 127) which refers to carrying out actions of marginal importance to one's sense of purpose while failing to follow through on the essential actions.

The main idea in action research is that it uses a scientific approach in addressing a problematic situation by involving those who are directly experiencing the situation. Action research works through a conscious cyclical four-step process whereby a manager embedded in a particular situation (context) and having a particular intention (purpose) engages in (1) planning, (2) taking action, (3) evaluating action and (4) further planning, and so on (Coghlan and Brannick 2010). The process is depicted in Fig. 1 with the additional initial phase of constructing.

The constructing phase involves a "dialogic activity in which the stakeholders of the [action research project] engage in constructing what the issues are, however provisionally, as a working theme, on the basis of which action will be planned and taken" (Coghlan and Brannick 2010, p. 9). It is in this phase that the stakeholders decide on what specifically is wrong in the situation being considered, what the causes of the issue may be, and whether an intervention is needed or wanted. Personal and organizational issues do not merely present themselves as such. The manager gains recognition of these through dialogue with himself,

[2] For the rest of the paper, "action research" will refer to "insider action research".

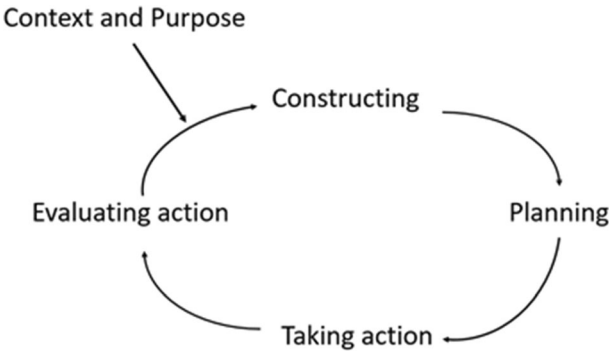

Fig. 1 The action research cycle (Source: Coghlan, David and Teresa Brannick, Doing action research in your own organization, 4th ed., © Coghlan and Brannick 2014, p. 8, London: Sage. Reprinted with permission of David Coghlan)

which is essentially what reflection is, or dialogue with others. This allows the issue and the agenda of change around it to be defined.

A variant of action research is the "individual reflective study" (Coghlan and Brannick 2010, p. 106) which entails the manager being engaged in an intended self-study of herself in action, studying to improve professional practice; and engaging simultaneously in self-reflection as events unfold.

An important method supporting reflective action research is journal keeping. Journal keeping may have the following functions for the reflective manager (McNiff et al. [as cited in Coghlan and Brannick 2010 p. 27]): it is a systematic record of events and people, a self-evaluative account of a manager's personal experiences, a useful way to "dump" painful experiences, a reflective account, and an analytical tool.

Journal notes of leaders have been shown to be a useful source of qualitative information for reflection and sensemaking (Bartunek et al. 1999; Krim 1988). Moreover, a manager may structure his journal entries in ways that allow him to keep track of experience, the questions that arise out of such experience, insights received, how he weighs evidence in order to verify understanding and how he makes decisions and takes action (Coghlan and Brannick 2010).

Another useful approach to structuring journal entries is based on the cognitive structure that characterizes how a manager thinks about and engages the world of work. Schein (1999) gave a useful framework for understanding a person's internal thought processes which he refers to as intrapsychic process. The framework provides a basis for guiding reflection and he called it the ORJI model which stands for Observation, emotional Reaction, Judgment, Intervention (Fig. 2).

Schein emphasizes the need to be very mindful when going through one's intrapsychic process to avoid the risk of falling into psychological traps which are involved in the ORJI cycle. These include misperception, inappropriate emotional response, rational analysis based on incorrect data, and intervention based on incorrect data (1999, p. 93). He advises that such traps may be avoided by identifying possible bases of misperception (e.g., assumptions and biases), identifying cultural assumptions in judgment and reason (e.g., values, deeply held beliefs), and instituting systematic checking procedures (e.g., questioning, silence, a spirit of inquiry).

Coghlan and Brannick (2010, p. 34) give the following guide questions for using Schein's ORJI framework for reflective action research: What did I observe? How did I react? What was my judgment about what happened? What did I do about it?

A reflection approach more in line with developing a sense of workplace spirituality in terms of "an individual's search to fulfil their potential for greater meaning and life purpose in their work"

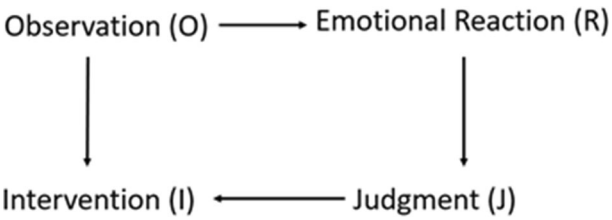

Fig. 2 Intrapsychic process: The basic ORJI cycle (Source: Schein, Edgar H., Process consultation revisited: Building the helping relationship. Prentice Hall Organizational Development Series, 1st, © 1999, p. 87. Reprinted by permission of Pearson Education, Inc., New York, New York)

was proposed by Neck and Milliman (1994, p. 14) which they termed "spiritual thought self-leadership". In their approach, they suggest a process of self-talk which among others, promotes the movement towards "opportunity thinking" (constructive ways of dealing with challenging situations) and away from "obstacle thinking" (reasons to give up and retreat from problems) (p. 13).

To accomplish this, they propose the following three steps to enhance one's beliefs and assumptions, self-talk, and mental imagery (Neck and Milliman 1994, p. 14): observe and record existing beliefs, assumptions, and self-talk; analyze the functionality of such thoughts; identify and develop more constructive thought patterns to substitute for dysfunctional ones.

In approaching a situation which may require reflection and/or intervention using the action research cycle, Coghlan and Brannick (2014) recommend an attitude of authenticity and the use of the general empirical method. Derived from Lonergan (as cited in Coghlan and Brannick 2014), this entails experience, understanding, judgement and decision/action.

Finally, Coghlan and Brannick (2014), recommend a process of meta-reflection. That is, as the action researchers go through the action research cycle, they also reflect on how they are doing it. This level of reflection about action is a separate level from the reflection entailed in constructing the issue and acting on it. The purpose of meta-reflection is to promote transformative learning – a change in one's views, assumptions and beliefs because of acting on an issue in dialogue with others.

Mezirow (1997, p. 5) defined transformative learning as a process of effecting change in a frame of reference which is composed of habits of mind and a point of view. Mezirow explains that adults "transform [their] frames of reference through critical reflection on the assumptions upon which [their] interpretations, beliefs, and habits of mind or points of view are based" (p.7). He further described the close link between transformative learning and action research that happens when learners actively engage the concepts in the context of their own lives and they are challenged to identify and examine their assumptions (p. 10).

Thus, critical reflections act as a parallel process to the action research cycle, enabling the action research to continuously inquire into his or own thoughts, beliefs, purpose, processes and values while acting.

Critical Realism

Critical realism is a philosophy of science founded by Bhaskar (2005, 2008) in the 70s as an alternative to the dominant positivist empiricism and strongly emerging contra-positivist relativist movement in the social sciences. It has since been developed further by others (Archer 1995; Archer et al. 2016).

Critical realism may be seen as an integrative resolution of the many problems that have been leveled against both positivism and relativism. With respect to positivism's preoccupation with

establishing causal laws through the observation of joint regularities of events, Bhaskar argued that "not only is constant conjunction of events not sufficient, it is not even a necessary condition for a scientific law …" (Bhaskar 2008, p. 1). On the other hand, Johnson and Duberley (2001, p. 150) observed that "relativism may well have the laudable aim of opposing positivists' naively objectivist epistemology, but the resultant skeptical alternative is devoid of any possible grounds for critique or intervention".

As a basis for management action, therefore, positivism and relativism are both problematic. Positivism insists on an objective detachment from the situation being studied while relativism denies an independent reality for a manager to act upon. On the contrary, Bhaskar argued that "actors shape their social worlds but, in turn, are constrained by social structures embedded in the fabric of social life" (Houston 2014, p. 219).

Houston further explains:

> This juxtaposition of 'reflecting' and 'doing' [by action research] to effect problem-solving is consonant with critical realism's aim of being an under-labouring tool, that is, one that casts light on areas of difficulty so that ethical, emancipatory action can be taken. Action research, along with critical realism, subscribes to the notion that it is not enough to understand the social world: We must also act to change it, to further human well-being. (Houston 2014)

Thus, critical realism is strongly supportive of action research, especially in terms of justifying critical engagement with problematic situations. Coghlan and Brannick (2010: 42) explained that "this approach follows a subjectivist epistemology similar to the hermeneutic tradition but [also] an objectivist ontology like the positivists." It has an epistemic reflexivity which exposes interests and then enables emancipation through self-reflexivity.

Critical realism, therefore, calls on the manager as knower and actor to question the basis for what he claims to know because this is affected, and potentially biased, by his presuppositions and pre-conceived notions (subjectivist epistemology). At the same time, he must strive to know as much as he can about realities which are independent of his own thinking (objectivist ontology). Both of these reflexive tasks are important to fully understand the causal forces impinging on a situation so that any obstacles to human flourishing can be understood and acted upon (emancipation). Furthermore, Winter and Munn-Giddings (2001, p. 265) explain that social inquiry is not value-neutral; its purpose is to enable citizens to re-describe and re-create their experience into a collectively desired state of affairs.

In order to support meaningful and reasoned action, critical realism provides a set of principles underlying its ontology and epistemology. The core tenets of critical realism are ontological realism, epistemic relativism, judgmental rationality and cautious ethical naturalism (Archer et al. 2016). At the heart of critical realism is its ontology or the way it considers the nature of things. Ontological realism means that "much of reality exists and operates independently of our awareness or knowledge of it" (Archer et al. 2016).

In particular, critical realism is concerned with the nature of causation, agency, structure, and relations. In this sense, this objectivist ontology is similar to positivism's claim of an objective reality. However, in contrast to positivism, critical realism does not impute too much causal weight on statistical regularities or regressions. Instead, it seeks a detailed, historical narrative, using retroductive or abductive inferences, of the causal mechanisms that bring about the empirical regularities which we experience (Bhaskar 2005).

Despite its assumption of a reality external to the observer, critical realism acknowledges our limited ability to know such reality. Thus, the attempts of a manager or researcher to know

the reality, say in terms of events and the causes of such events, about an organizational situation cannot guarantee that the complete reality will or can be known. Still, it is assumed that such a reality exists. Critical realism departs from the relativist view that for all intents and purposes "the world is the result of representational practices" (Johnson and Duberley 2001, p. 110); that is, the belief that the world is simply the way we look at it and perceive it.

However, critical realism embraces epistemic relativism which gives weight to the knower's point of view. Archer et al. (2016) explain that "our knowledge about that reality is always historically, socially, and culturally situated … and [it] is transformed by human activity."

A manager who investigates a situation, therefore, brings a point of view into such an investigation. In fact, the manager's recognition of the problematic nature of a particular situation already, at least partly, brings a perspective which may be unique to the manager. Critical realism accepts that people can only ever know the world through their own lenses and the true nature of reality will be revealed only in incremental and limited ways. In this sense, critical realism is similar to relativism in its subjectivist epistemology (philosophy of knowing) (Coghlan and Brannick 2010).

If points-of-view influence one's knowledge of reality, how can one gain assurance of the quality of knowledge? Critical realism's third tenet is judgmental rationality. Archer et al. (2016) explain that:

> not all accounts are created equal. We are able to, and required to, adjudicate between rival or competing accounts, and there are often relatively objective reasons for affirming one model over another.

One basis for improving accounts of reality or knowledge in general is through the pragmatic application of such knowledge through action. Johnson and Duberley (2001, p. 162) explain that:

> a means of evaluating the veracity of … theories … is through their practical success or failure. … our everyday practical actions as human agents tacitly presume that external causal regularities exist which we may act upon. Even though our conceptualization and explanation of such regularities are always open to question (due to our lack of a theory-neutral observational language), our ability to undertake practical actions that are successful and our ability to reflect upon and correct actions that seem unsuccessful implies that we have feedback from an independent `reality' which constrains and enables practices that would otherwise be inconceivable.

Judgmental rationality in critical realism legitimizes the iterative cycles of action and reflection that characterize action research. The action researcher's initial understanding or theory of a situation may be treated as a hypothesis which acts as a basis for action. Implementing the action and subsequently noting the outcomes provides feedback which can be used to refine or otherwise modify the initial understanding.

The last core tenet of critical realism is cautious ethical naturalism which posits that while the naturalist fallacy of equating "is" with "ought" must be avoided, we can be justified in identifying a normative or value-based aspect in our knowledge. Archer et al. (2016) argue that facts and values cannot be completely separated and that "in theory at least, the social sciences may be able to tell us something about the 'good' life or the 'good' society and the conditions under which human beings can 'flourish'."

Cautious ethical naturalism allows critical realism to support humanistic management in avoiding the positivist aspiration of a value-free "scientific" practice of management – enabling management to be an essentially human science.

Implementing Insider Action Research in The MBA Program

In reviewing its MBA program, department faculty were inspired by the Catholic Missionaries' Guiding Principles which emphasize the important role of educating all students to be more responsive to the needs of society: the ultimate aim must be to make a difference in the lives of those who are powerless, oppressed, marginalized and deprived of dignity. Thus, Mission schools instill in learners a concern for justice and peace, and a commitment to being in active solidarity with the poor.

In 2011, the department's mission became "to develop competent, humanistic, nationalistic, and socially responsible business leaders, professionals and entrepreneurs that serve as change agents in society."

Introducing Insider Action Research into the Curriculum

In 2012, the department revised the MBA curriculum to incorporate two foundation courses: Mission Business Leadership (which incorporates business ethics and social responsibility) and Management Action Research. These revisions are consistent with Navarro's (2008) recommendations on strengthening the ethics, experiential learning and soft-skill components of the MBA program. The first course focuses on ethical business practices guided by Catholic Social Thought and Mission principles and includes a service learning pedagogy. The second one focuses on being a practitioner-scholar in promoting social change in business organizations. The terminal outcome is an integrative action research paper describing the student's change agent practice while applying technical learnings from literature research and course work in the core courses (Fig. 3).

In a large-scale system change project using an insider action research methodology, an external consultant is likely to be helpful (Coghlan and Brannick 2010). In 2013, Prof. David Coghlan, pioneer scholar of insider action research from Trinity College Dublin, was invited by the department as visiting scholar. Prof. Coghlan conducted seminars for faculty and students on the finer aspects of action research practice and scholarship. The department adopted the book *Doing action research inside your own organization* by Coghlan and Brannick (2010/2014) as the standard reference for MBA students.

Action research is an appropriate competency to pursue in the department's MBA curriculum given the goals of the department to form Mission business leaders who can be reflective change agents. Moreover, action research supports the humanistic orientation of the department since it "contributes directly to the flourishing of human persons, their communities and the ecosystems of which they are a part" (Reason and Torbert 2001, p. 6).

The MBA program aims to train students, through an integrative implementation of a change project, using three broad strategies in action research referred to as first-person, second-person and third-person (Reason and Torbert 2001). First-person action research involves practicing critical subjectivity whereby the student learns to "foster an inquiring approach to his or her own life, to act awarely and choicefully, and to assess effects in the outside world while acting" (p. 17). In simple terms, this trains students to be reflective in their management practice.

Second-person action research enables the student to "engage with others in a face-to-face group to enhance [their] respective first-person inquiries" (Reason and Torbert 2001, p. 20). Students learn to engage other stakeholders in the organizational situation they wish to change so that these individuals can be co-researchers and learn and reflect about the action being planned and implemented. This approach develops the communication and collaborative skills of the students.

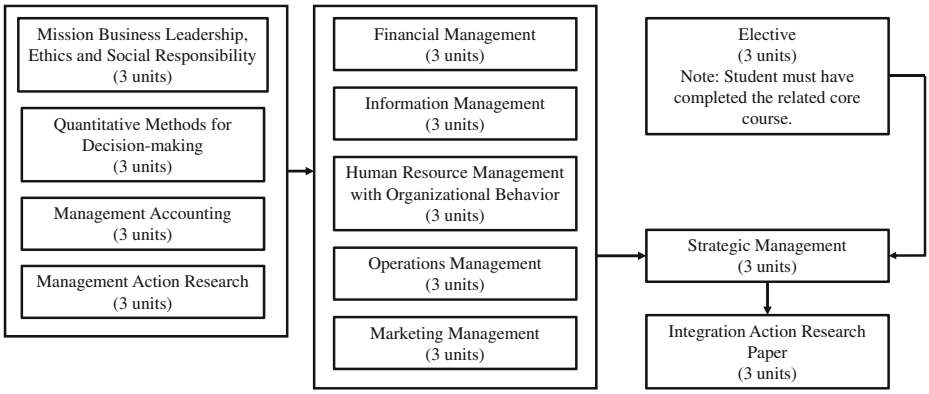

Fig. 3 The curriculum of the MBA Program of Mission University

Third-person action research aims to create a wider community of inquiry involving persons who do not know each other face-to-face and yet can be part of a process of influencing and transforming organizational strategy and even government policy (p. 23). Students can learn to be part of research conferences where they can share their action research experiences and engage in dialogues which can encourage others to learn and pursue their own change initiatives. This aspect of action research is closest to the scholarly activities that academics typically do. The main difference is that students are not merely consumers of knowledge from the academic production but also contributors through their own recorded experiences.

A key element in third person practice of action research is the use of theory and the building of new theory (Friedman and Rogers 2009). Using critical realist methodology, students work with their fellow stakeholders to analyze causal forces influencing the situation they are addressing. Such forces include those operating in the situation independently of the action researcher (ontological realism) as well as those operating within the belief systems of the stakeholders (epistemic relativism).

The interplay of different forces bringing about the situation can be presented through a force-field diagram based on the work of Kurt Lewin, the founder of action research (Lewin 1948). Alternatively, students can use realist vector diagrams (Anjum and Mumford 2010). Lewin argued that a social situation at a given time is maintained by a balance of counteracting forces. Furthermore, to bring about change this balance of forces must be upset. The student extrapolates a refined causal theory of the situation and the impact of his or her intervention, along with other stakeholders, at the end of the action research project.

Students are trained to do the three-person practice in their project using the iterative action research cycle explained above. Following Coghlan and Brannick (2014), students are guided in their action research to reflect on key questions for themselves and in collaboration with others in the workplace. Typical questions would be as follows:

> *Context and purpose*: What is our initial understanding of the situation's background? Who are involved? What are our goals? How did the situation come to be? What are our roles, goals, needs and concerns coming into the situation?
> *Constructing*: What do we and the people involved agree is the issue and causes?
> *Planning action*: What do we plan to do with the people involved in order to address the issue and achieve your goals?

Taking action: What did we actually do with the people involved in order to address the issue and achieve your goals?
Evaluating action: What results did we and the others achieve relative to our goals? For ourselves? For the others? For the organization?

A student action research project would typically involve at least three cycles. Each would be followed by meta-reflection on, typically, the following questions based on Mezirow (1990) and supportive of the critical realist tenets of judgmental rationality and cautious ethical naturalism (Archer et al. 2016):

Content: Did I focus on the right issue? Should I have looked at something else? Something more? What did I learn about the issue that I didn't know before?
Process: What do I think about how I went about addressing the issue? How I collaborated with others? Could I have done things better and differently?
Premises: What did I learn about my purpose, values and assumptions about the issue? Do I affirm them? Do I change them?

The revised MBA program is premised on the belief that adherence to the action research and meta-reflection cycles enables students to achieve incremental progress in their workplace change project while gaining important skills for future problem-solving efforts and enhancing collaborative relationships with stakeholders. Moreover, the MBA program also seeks an important meta-learning or reflective outcome – a transformative learning experience for the student upon completion of the action research project. This is akin to Fastow's reflective admission cited above (McLean and Elkind 2006).

An Illustrative Student Action Research Project

A student in the MBA program pursued action research to address chronic workstation discomfort among workers in a digital marketing company where the student served as a sales team leader. He had deemed it urgent to do something about the increase in the number of employees complaining about their discomfort while working for prolonged periods in computer workstations. His aim was to solve drops in productivity and to avert injuries, morale issues, and employee turnover. The student, together with his collaborators, explored alternative ergonomic strategies. During the initial action research cycle, they redistributed their work movements across different body parts across the work day. This did not yield positive results, leading the group to implement a series of seminars for the employees on ergonomic work habits and exercises. The group gained support from top management to relax certain work policies to allow time for the needed preventive exercises. The student recorded in his journal: "I feel that my manager strongly supports our goal of performing better while keeping our health a priority. The amount of time that he and our IT manager have spent just to figure out a way in order for us to be more comfortable in our task has made me feel that our team is valued and appreciated."

The subsequent action cycles did yield improvement in workstation comfort for the employees, with no reduction in productivity. The student's causal force-field analysis of the situation is shown in Fig. 4 using an adaptation of the vector diagramming method of Anjum and Mumford (2010).

The vector diagram in Fig. 4 shows the causal analysis conducted by the student on the issue of workstation discomfort as well as the interventions implemented to address the issue. The center line indicates the issue faced by the action researcher which is chronic workstation discomfort. The improvement goal is shown on the right side of the diagram. The various arrows show the driving forces (interventions implemented), the hindering forces, and their relative strengths indicated by the arrow lengths. The diagram reflects Lewin's (1948) force field theory where the sum of driving forces must exceed the sum of hindering forces for the situation to improve towards the goal. The diagram also reflects Anjum and Mumford's (2010) argument that, realistically, the net total of the forces (resultant) should exceed a threshold (symbolized by a vertical dashed line) for improvement to occur. The student believed that the various interventions he implemented with his workmates added up to cause improvement in their workstation comfort, as indicated by the resultant vector crossing the threshold line.

The student's meta-reflections after the project showed an increased sense of efficacy in bringing about humanistic change in the workplace, in this case, by addressing workplace physical discomfort. He noted that this was a common problem in many workplaces which was often unaddressed. The student also appreciated the improvement in his leadership competencies brought about by initiating and successfully implementing change in collaboration with his work team and superiors.

Lessons Learned, Prospects and Challenges

The faculty of the department introduced action research as a way of enhancing the relevance of the MBA program to the university's social mission. The curriculum innovation was successfully implemented due to a timely confluence of supportive developments in the university, including a resurgence of fervor for the social mission and the initiative of key academic leaders.

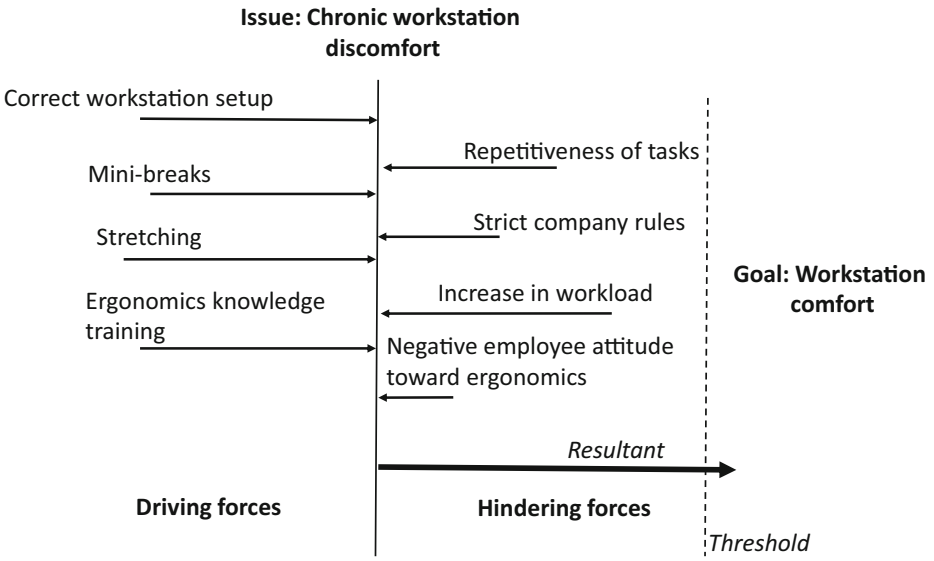

Fig. 4 Force-field analysis of workstation discomfort

The students have responded enthusiastically to the opportunity to make a positive difference in their workplaces and to obtain a distinct type of MBA education which trains them to be purposeful, reflective, collaborative, analytic and action-oriented. With continuing dialogue among the faculty and the students, there is reason to be optimistic that the implementation will further improve in the future.

There are three main challenges:

1. Faculty training on critical realist action research needs to continue unabated. There is a strong tendency among some faculty to revert to positivist criteria when evaluating the students' action research projects.
2. The university's accrediting body has raised concerns about the validity and effectiveness of the action research approach in the MBA program. The department will need to carry out a rigorous follow-up study among its graduates to address this concern.
3. There is a tendency among students to choose safe topics for their research, i.e., those that merely entail improving operational efficiency or achieving financial goals – thus missing or undermining the normative and emancipatory emphasis of critical realist action research. It may be necessary to improve the training of the students on building a better political platform in their organizations for truly humanistic change projects.

The implication of the experience of Mission University in integrating action research into its MBA curriculum is that students can be oriented and given the needed tools and learning experiences to be reflective and positive change agents in their workplaces. Given the ethical challenges which continue to beset global business practice today, business schools will find it worthwhile to give action research a serious consideration.

Compliance with Ethical Standards

Conflict of Interest The author states that there is no conflict of interest regarding this paper.

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