Learning along with Participatory Action Research – A Finnish Perspective

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Many definitions of action research, especially of participatory action research, include the idea of learning as one core result of the interventions. These definitions cover the learning of all people involved, and present an interesting learning challenge for the researchers applying action research. In Finland, the first action research projects in working life research were started as late as in the 1980s. Since then action research has held its own as a significant tool in the development of work organizations, particularly in the enhancement of employee involvement and learning at work. This paper provides an example of the interaction between theory and practice as a part of action research processes in the Finnish municipal sector, and consequently as a part of the learning of the action researchers. The learning process is captured by re-reading of, and reflection on, the earlier publications. The findings are presented in the form of a conceptualization-oriented learning narrative that complements the learning taken place, either on the government policy level or on the programme level, depending on the larger organizational background of the action research conducted. Parallel to learning, this paper focuses on participatory action research employing dialogue forums and especially on its particular characteristics that give a voice and, to a certain extent, also offer a choice to the employees in using their discretion in the formulation of organizational change.

Key words: learning of the researchers, learning at work, employee involvement, participatory action research, dialogue forums, organizational change, dialogue forums

1. Introduction

1.1 Action research data as a source of new interpretations

There are many approaches to action research, so many that Reason and Bradbury (2001) call them a "family" of action research approaches. What the members of this family have in common is the type of research settings that combine a generation of new knowledge to change-oriented activities, often called interventions, and nowadays also to the participation of the people in question. In Finland, the first action research projects in working life research were started as late as in the 1980s and they all employed some types of participatory action research (PAR) approaches and methods. These first projects were conducted as joint efforts by the Ministry of Labour, the Finnish Employers' Management Development Institute and the University of Helsinki. Also, the Education Centre of the Finnish Metalworkers' Union offered training in the method for its members and their employers. (Alasoini et al. 2006.)

The action research approach that the author of this article is familiar with is a combination of the classic action research cycles which involve evaluation-based learning (Lewin 1948) and a communicative, Scandinavian type of action research which relies strongly on dialogue between all stakeholders. The acquaintance with the matter started in a municipal action research project called the Quality Project in 1991-1993 (Kasvio et al. 1994). The project, funded by the Finnish Work Environment Fund and the participating municipal organizations, was a joint endeavour of the Local Authority Employers, trade unions and the Work Research Centre, University of Tampere. A group of seven researchers, including the author of this paper, was confronted with quite a big learning challenge when starting to apply action research in practice. None of the researchers had any earlier experience of it, but in addition to the original research texts, some literature of the field that was already partly translated into Finnish (Kasvio 1990: 119-123) proved useful in the course of the process.

1.2 *Action research in Finnish municipal organizations: Quality Project and Quality Network*

The aim of the pioneer Quality Project was to provide new ideas for the modernization of the municipal service organizations in Finland. It was launched in 1991 as a response to many problems caused by professional bureaucracies, including a shortage of labour in certain public services, growing pressures of citizen orientations and problems with productivity and the quality of working life. The municipal staff had to keep up a very hectic pace of work and cope with an increasing workload, which eventually resulted in conflicts at the workplaces. Their possibilities to influence their work were better than those of staff in the private and government sectors but, because they were highly educated and highly professional, they also had high expectations. (Nakari 1992: 41.) As the initiators of the project, the labour market partners, wanted to strike a balance between productivity and quality of working life, they needed tools that could generate organizational changes without jeopardizing the commitment of the municipal staff. Finally participatory action research proved to be the most useful tool due to its inherent emphasis on employee involvement.

The concrete model to be employed was adopted from the Swedish Leadership-Organization-Co-determination (LOM) programme (Gustavsen 1991). The LOM programme included one promising element that met the needs of employee involvement: the Dialogue Conference, known in Finland ever since the late 1980s (Gustavsen/Engelstad 1986). Strategic human resource management (Schuler 1989) and organizational assessment (Seashore et al. 1983) were selected as theoretical frameworks for the evaluation of the basic line and progress of the project. Although hit by the severe recession of the early 1990s, which turned the shortage of labour into a surplus of labour and made some municipalities quit co-operation, the project was finalized in a successful atmosphere. The practical outcome of this seemed to support the theoretical framework that had emphasized the role of employee involvement as a key to improving the quality of working life and also to increasing productivity gains (e.g. Qvale 1994). An account of the total conduct of the

project has been given in the final report written by Kasvio et al (1994, in Finnish only).

In 1995 a permanent Quality Network was established to co-ordinate communicative action research projects in the municipalities. It was later opened to all researchers, consultants and professionals of human resource management interested in dialogue-based development methods (Lehtonen/ Kalliola 2008). Today the network has around 40 individual members. Also, three participant organizations of the network took part in the Life as Learning Programme funded by the Academy of Finland in the period 2002-2006. The research funding provided by it made it possible to explore the development methods of the Quality Network more closely.

The practical outcomes derived from most participant organizations in the Quality Network confirm that Dialogue Conferences can produce good practical results: every conference has generated something new and the participants like attending them. Practical changes in the modes of operation may range from new decisions to improve the intra-organizational information channels (newsletters for the staff, weekly staff meetings) to new relationships with the organizational environment (customer surveys; regular evaluation of the activities taken) or to new ways of organizing work (team building connected to power delegation). (Kalliola/Nakari 2004, 96-101.) The participants often give spontaneous feedback as soon as at the conference, at the same time as they present the results of their group discussions. Also, sometimes there are more people willing to participate in the conference than is rational, from the point of view of having a possibility to take part in the discussions. The question is: How and why do the conferences work? What is it in the Dialogue Conferences that produces and maintains commitment to organizational change?

1.3 The aim of the article

Many definitions of action research, especially of participatory action research, include the idea of learning as one core result of the interventions. These definitions cover the learning of all those involved, including the researchers. The aim of this paper is to point out how the researchers have

learned to conceptualize the potential of their method from different practical and theoretical perspectives. Another plot revolves around gaining an understanding of the role of the employees and the management as learners and change agents in shaping their organizational future. The concrete aim of the paper is to present the learning process of the author (and also her research fellows) in trying to understand the potentials of Democratic Dialogue and Dialogue Conferences, as a method of employee involvement, workplace learning and organizational change, by re-reading earlier research and reflecting on the conceptual choices made.

Results of the reflections are presented as a conceptualization-oriented narrative that is needed to complement the learning taken place either on the program or the government policy level (Alasoini 2008; Gustavsen 2008). At first, to place the Finnish municipal action research projects into their context, some recent government initiatives with the aim of enhancing employee involvement and workplace learning in Finland are presented.

2. Employee involvement and workplace learning as values and productive factors in Finland

From the point of view of the practical working life, employee involvement has been understood as something that the employees want, or even demand, in the form of workplace democracy, whereas the management tends to stick to the traditional power positions. Conceptually the definitions of employee involvement are many and partly overlapping. Workplace democracy, quality of working life, shared decision making, participation, participative management, labor-management co-operation and employee voice (Dundon et al. 2004) all seem to contain the important dimension of employee influence on the final outcome of planning and decision making. Also some forms of work organization include the dimension of employee involvement; for example, in the classic semi-autonomous team, the degree of employee influence is high (Trist/Bamfort 1951).

As a practical phenomenon, employee involvement has recently gained new dimensions. In a situation in which global competition shapes production life and consequently the pace of working life is very hectic, the management

has to turn to the employees and ask them to commit themselves to carrying out changes in their daily work: changes that the management sees as necessary but that cannot be put into practice without the employees' commitment and contribution. In addition, the notion of workplace learning as a competition factor increases the importance of employee involvement; this is where a need arises for space to reflect on the aspects of work and its organization.

Earlier Finnish research (Nakari 1988; also Kalliola 1999: 21) on this topic suggests, first, that the employees value only the kinds of participation procedures that provide them with relevant information about their work early enough in advance, which then allows them to participate in the planning of the changes, and second, that the impacts of their opinions and work experience can be observed also in the final decisions. This implies that the key factors in the participation process are the opportunities of employees to influence the final outcome of decision-making processes on the different levels of work organizations (Kalliola 1999: 21). Consequently the employees tend to reject the employers' approaches to consulting with employees that remain only formal, and do not have any further impact.

In recent years, two government initiatives with the aim of solving the employee involvement issue have been identified in Finland. Both are partly connected to the influence exerted by the European Union with reference to the Directive for Employee Information and Consultation Rights (Directive 2002/14/EC).

The first initiative aimed to reform the Act on Co-operation within Undertakings and launch a totally new Act on Co-operation within Municipalities, replacing the earlier agreements between the bargaining parties (Local Authority Employers and the trade unions) (Www.mol.fi; www.kuntatyonantajat.fi.). The earlier private sector act was obeyed mainly in the case of dismissals, and the municipal co-operation agreements were often complied only superficially without any serious joint reflections between the management and the staff.

Both new acts came into force in 2007. Following the EU framework, they emphasize the spirit of co-operation and the effort to reach consensus to a much greater degree than the earlier act and the municipal agreement (Www.mol.fi; www.kuntatyonantajat.fi.). The law on co-operation within the

government sector is from the year 1988 and is currently waiting for an update.

The approach adopted by the Finnish legislators comes close to that put forward by Heller (1998: 1445), who argues that further support for lasting schemes for organizational democracy derive from formal, usually legally backed measures and thrive within collective representation. The underlying idea here is that the values of any given society are represented in its laws. Because the Finnish legislation values employee involvement and supports collective representation, there are also norms in the above-mentioned laws that concern direct participation. Direct participation and innovation generation through workplace learning are some of the aims of a government initiative called the Finnish Workplace Development Programme, (TYKES, 2004-2009), which is a third consecutive development programme implemented in Finland since 1996. The basic guidelines of these programmes have been agreed on as part of tripartite income policy. The latest development programme aims to capture the spirit of co-operation more deeply than the earlier two. Development activity in the projects within the programme is based on co-operation between the management and the staff of the workplace concerned. A labour-management agreement about the need for and general aims of the project has to be reached to have a project accepted into the programme that promotes the modes of operations of Finnish companies and public work organizations with an eye to simultaneous enhancement of productivity and the quality of working life. The government calls this qualitatively sustainable economic growth (www.tykes.fi), which can be partly traced back to the Lisbon Strategy (Kari et al. 2008: 78-85), which is an ambitious, but thus far not so successful, action and development plan for the European Union for the period 2000-2010. Its aim is to turn the European Union into the world's most dynamic and competitive knowledge-based economy, capable of maintaining sustainable economic growth with more and better jobs and greater social cohesion by the year 2010, respecting the environment at the same time. Also the Academy of Finland has contributed to the Lisbon Strategy by conducting a research programme called Life as Learning (LEARN) in the period 2002-2006. One of the main themes of this

programme focuses on the new challenges of learning in working life (www.aka.fi).

While the new cooperation acts and the TYKES Programme may be seen as tools to put the Lisbon strategy into practice, they also support each other in the enhancement of employee involvement in Finnish society. In addition, the TYKES Programme is based on a view that the most effective way of generating new innovative solutions for working life is to have close co-operation and interaction between workplaces, researchers, consultants, public authorities and the social partners. The programme is based on the recognition of two notions: 1) for a small country like Finland, the capacity of the different parties to join forces is a pre-condition for coping with the globalization of economy and 2) success in the new competitive environment increasingly calls for workplace innovation (www.tykes.fi). In the beginning the programme was under the auspices of the former Ministry of Labor, (today called the Ministry of Employment and the Economy) and since 2008 it has been co-ordinated as a technology and research area called Workplace Innovation and Development coordinated by Tekes, the Finnish Funding Agency for Technology and Innovation.

The establishment of the Finnish Workplace Development Programme (TYKES) has contributed to the application of various theoretical and meth-odological approaches in the research-assisted projects financed by the programme. Among other organization research methods, action research has gained favour during the conduct of the programme.

3.   How to reflect the past action research projects?

3.1 The two-fold role of action research interventions:
Data gathering and organizational change processes

According to the experience gained by the author in the Quality Project and Quality Network, action research interventions have two-fold roles consisting of data gathering and organizational change processes. Usually the interventions offer excellent possibilities for data gathering and produce many kinds of data, including diagnostic and evaluation surveys and interviews, memos of the task forces and discussions with the participants, official documents of

the organization, progress and final reports, and the researchers' own field diaries.

Usually the data is available, although no organizational change takes place. However, the action researchers' access to the organization is almost always tied to the expectation that at least some improvements will occur in the organizational life. The members of the participant organizations value all tools that can be used to document any kind of change: for example, in the case of public service organizations, among these are the creation of local economic performance indicators and the measurement of the quality of working life by questionnaires or descriptions of new modes of operations (team building, client surveys). It is easy to understand why an organization wants to prevent outsiders from making their experiments without giving any realistic promises of positive changes. Often it is extremely worthwhile for the researchers to try to find out about the prerequisites and constraints for the desired change, because these might be keys to the organizational culture that would stay hidden without the intervention. These kinds of research approaches require conceptualizations that can be used to explain the practical results of the interventions.

In most cases, the data is eventually so rich that it is impossible to analyze it thoroughly during one research project, and therefore choices must be made, and certain perspectives must be preferred above others in producing final reports. There is always a possibility to make new choices, to revise perspectives, to make new interpretations and, at the same time, to learn more about the earlier research reports, which is done in this paper.

3.2 *The Municipal Quality Project and Network publications under study*

The reflections on the past projects in this article were selected for two reasons. The first is a practical one: they are published in English. The other is the relevance of the publications to the theme of the article: the contents of the publications cover the intervening themes of employee involvement and workplace learning, but the theoretical frameworks must be different to allow for evidence of the learning of the researchers. In addition, there is one more

limitation to mention: here the inputs from the literature of strategic human resource management and organizational assessment (Schuler 1989; Seashore et al. 1983) are left aside, and the focus lies on the publications concerned with the understanding and application of Scandinavian communicative action research.

The publications to be re-read are the following:

a) Kalliola, S./Nakari, R. (eds.) (1999): Resources for Renewal – A participatory approach to the modernization of municipal organizations in Finland. Amsterdam/Philadelphia: John Benjamins.

   The compilation study for the international action research community was edited purposefully in a different way from the original final report of the Quality Project in 1991-1993 (Kasvio et al. 1994). While the Finnish version combined all the cases under common themes (methodology, quality of working life, labour-management cooperation, productivity, human resource management and organization culture of municipalities), the English version presents, in addition to the methodology, four cases from the Quality Project period 1991-1993 and one case from the Quality Network period (1995 and onwards) and an analysis of the role of trade unions as development partners.

b) Kalliola, S. (2003): Self-Designed Teams in Improving Public Sector Performance and Quality of Working Life. In: Public Performance & Management Review, 27(2): 110-122.

   The article presents a case study of the Quality Network period, in which the staffs of home care workers from the social and health sectors planned together multi-professional teams.

c) Kalliola, S./Nakari, R. (2003): Spaces for learning and cooperation in municipal organizations. "Work and Lifelong Learning in Different Contexts", 3rd International Conference on Researching Work and Learning, July 25-27, 2003, Tampere, Finland, Proceedings Book II: Theme 4: Partnerships and Co-operation in Workplace Learning. University of Tampere 2003. 104-113.

The conference paper was a first conscious step towards attempting to define workplace learning in connection to dialogue forums.

d) Kalliola, S./Nakari, R./Pesonen, I. (2006): Learning to make changes: Democratic dialogue in action. In: Journal of Workplace Learning, 18(7/8): 464-477.

e) Kalliola, S./Nakari, R. (2007) Renewing occupational cultures – Bridging boundaries in learning spaces. In: International Journal of Educational Research, 46(3-4): 190-203.

The articles are based on the case organizations that participated in the Life as Learning Programme of the Academy of Finland in 2002-2006. The focus was both on the organizational prerequisites to secure learning, and on the concrete changes that were pursued by applying Democratic Dialogue.

The five research texts are re-read here from the perspective of an action researcher who wants to reflect on her earlier understandings, interpretations and conceptualizations about her method as a tool to secure employee involvement, workplace learning and organizational change. In an attempt to learn about the choices made in earlier research, the information about the original action research cases is used only in its interpreted form, as appearing in the publications under study. The original data have gone through many transformations, from, for example, project group memos, observations documented in the field diaries, questionnaires and recorded interviews to progress and final reports given to the participants and required by the funding organizations, as well as to academic publications.

The results of the re-reading are presented in an order that satisfies the logic of the author, although her colleagues might give personally varying presentations. The details of the cases illustrating the learning reflections about the Dialogue Conferences are identified according to their municipal sector and the source publication. In addition, relevant other project and network publications, also in Finnish, may be referred to in order to clarify the stands taken.

4. Democratic Dialogue and the Finnish application – Value-based pragmatism

As Czarniawska (1996) states, ideas travel, also ideas about good change management, but they can change on the way. These ideas have to be adapted to the new organizational values and environments, representing to a varying degree a different culture than the one that generated the new idea. The municipal Quality Project (1991-1993) was established to respond to circumstances partly similar to, and partly different from, those that Gustavsen (2001) refers to in his description of the history of Dialogue Conference.

According to Gustavsen (2001: 18), Dialogue Conference dates back to the 1980s when the problem of diffusing new forms of work organizations throughout working life was acute and experienced by both labour market parties and researchers. An idea of new labour market agreements dealing with development was complemented with another idea of introducing conferences where all those concerned could discuss the goals and visions they would like to pursue and the ways in which to realize them. Special criteria for Democratic Dialogue were created to guide the practical conduct of the conferences. Thus the idea of dialogue conference has emerged as a setting for discussing development and as an institutionalization of the mediating discourse between the practical and the theoretical. Innovation diffusion was meant to be done by means of network of clusters consisting of same type of organizations (Gustavsen 1991).

The Finnish municipal sector experienced the same type of need to secure the diffusion of the potential new modes of operation pursued by the project, and thus the idea of development and diffusion network was adopted in Finland (Kasvio et al. 1994). In addition, some concrete means were needed to decrease antagonism in a situation where staff – management relationships were hierarchical (Nakari 1988), which implicated that the first municipal workplace democracy scheme introduced in 1977 "had not worked". It was hoped that the Dialogue Conferences would work, and thus the criteria for Democratic Dialogue were introduced to the municipal audience as a set of guidelines worth following. In the Finnish municipal version of these guide-

lines, the "criteria" for Democratic Dialogue are sometimes translated as "principles", but understood as obliging "rules" as well.

An interpretation can be made here regarding the status and the nature of the criteria for Democratic Dialogue: they have not been very easy to establish. According to Gustavsen (2001), the researchers have, after some epistemological reflections, progressively returned to the pragmatic understanding of the conference in favor of "what works". One of the latest formulations of the criteria for Democratic Dialogue is the following:

1. Dialogue is based on a principle of give and take, not one-way communication.

2. All concerned by the issue under discussion should have the possibility of participating.

3. Participants are under an obligation to help other participants be active in the dialogue.

4. All participants have the same status in the dialogue arenas.

5. Work experience is the point of departure for participation.

6. Some of the experience the participant has when entering the dialogue must be seen as relevant.

7. It must be possible for all participants to gain an understanding of the topics under discussion.

8. An argument can be rejected only after an investigation (and not, for instance, on the ground that it emanates out of a source with limited legitimacy).

9. All arguments that are to enter the dialogue must be presented by the actors present.

10. All participants are obliged to accept that other participants may have arguments better than their own.

11. Among the issues that can be made subject to discussion are the ordinary work roles of the participants – no one is exempt from such discussion.

12. The dialogue should be able to integrate a growing degree of disagreement.

13. The dialogue should continuously generate decisions that provide a platform for joint action. (Gustavsen 2001, 18-19.)

In Finland, Dialogue Conferences are nowadays called Work Conferences (työkonferenssi). They are defined as discussion forums that invite representatives of all stakeholder groups and hierarchical levels of an organization to evaluate the past and the present and to make plans for the future using the criteria for Democratic Dialogue as guidelines. (Alasoini et al. 2006: 9-11.) The Finnish version, including usually a starting conference and the mid-term and final evaluations of the project by the conference method, is often used within only one municipality. However, the participants are selected and invited according to the principle of crossing the service sector borders and hierarchical levels, which both enhances diffusion and prevents confrontations between individual employees and their supervisors. When a potential new project is negotiated, the criteria for, or the obliging rules of, Democratic Dialogue are always introduced to the representatives of the organization in question. This development method offered to the municipalities is based on values to such a degree that their existence cannot be hidden. It is also explained to the potential participants that it is necessary to extend Democratic Dialogue to the project group/task force in charge of the concrete conduct of the project as well.

5. The role of the technical aspects of Democratic Dialogue as facilitators of learning

The attraction of the Democratic Dialogue is put to the test in Work Conferences that may be organized after establishing a project group/task force and conducting some basic analysis of the objectives to be pursued. The first Work Conferences of the Quality Project were conducted "by the book"; that is, by following the application procedures as translated and modified by Kasvio (1990: 119-123) from the original sources.

The first concrete decision to be made was about inviting the right participants according to Criterion 2 ("All concerned by the issue under discussion

should have the possibility of participating"). Sometimes the researchers do not know who they should invite to participate in the development activities. If they do not get any advice from the members of the organization, their efforts may prove pointless later.

These kinds of problems are connected to situations where too little time has been allowed for the project, which leads to the fact that the researchers are not able to get familiar with the organization early enough. Another similar situation can occur when the project group reaches a point at which it no longer has authority to enhance project diffusion.

To gain a better understanding of the potentials and restrictions of the technical aspects of the method used, the Quality Network (established in 1995) organized three special Work Conferences and collected data to improve the methods. The conferences were titled "The Critical Phases of Organizational Development" (1997), "Let's Learn from Each Other" (1999) and "What Will Take Place After the Project?" (2001) (Kalliola/Nakari 2004: 120.).

One learning result relevant in this connection is the emphasis that was given to the initial negotiation phase, in which the members of the organization and the researchers discuss the scope, methods and participants of the project. It was pointed out that a negotiation phase should allow thorough pre-research on the power elites, including their strategic choices and managerial preferences, and also the anticipated necessary organizational or sectoral borders that have to be crossed, or bridged, by the development activities. (Kalliola/Nakari 2004: 110-111.) These types of constellations give relevant information about the people concerned, and thus about the right people to be invited to the dialogue forums.

After the people concerned have been found, the criteria of Democratic Dialogue are distributed to every participant along with the conference invitation and in the conference they are seen as posters, brochures or slides during every phase. Often also an oral explanation or interpretation, takes place.

The first Work Conferences of the Quality Project (1991-1993) were started by creating visions of the future of the issue under discussion. This took place in homogeneous groups; for example, the members of the same

occupational group created a vision based on their interests and the supervisors and top managers would make their own. The visions were then presented and discussed in plenaries, after which all visions were given to new mixed groups called diagonal groups, which consisted of representatives of every stakeholder and hierarchical group present in the conference. These diagonal groups worked on the theme of problems: What obstacles there are on the way to attain the vision in question? Again, the results were discussed in plenaries.

After visions and problems, the two latter phases of the conferences concentrated on future action. First, the obstacles found by every diagonal group were discussed in freely formed groups with the aim of finding ways to overcome the obstacles. After a plenary, the people who worked together, "natural organizational groups", made use of all the earlier discussions and formulated concrete action plans for the future, sometimes for the near future and sometimes for a more distant future. The conferences concluded with a plenary discussion in which the ideas brought forward were summarized, emphasizing the similarities and differences in the experiences and attempting to establish a foundation for something that could be done immediately.

In the course of the project, the members of the participant organizations were invited to many conferences (sometimes based on a common theme such as strategic human resource management or, in a service sector, care for the elderly), which led to the observation that there must be some flexibility in the conference protocol to avoid mechanistic repetitions. However, the author has found it important that, in a new case, the very first conference should always be organized along the original procedure, since there is a lot of potential in its technical aspects.

The first two phases (visions and obstacles) are very important to the employees, because the proper conduct of them secures that their voice is heard. In addition, their voice is not only heard but also taken seriously, because the visions of every group in question are treated with equal respect and they all form a basis for further discussions and concrete planning.

During the group discussion, the researchers ensure that everyone participates and no one dominates the discussions. This is usually done in the favor of those employees who are not so used to express their opinions. Thus the

researchers want to promote Criteria 3 and ("Participants are under an obliga-tion to help other participants be active in the dialogue") and 4 ("All partici-pants have the same status in the dialogue arenas"). When everyone, both managers and employees, has to take a stand and present their view of the matter at hand to others, the picture of the organization that at the beginning was perhaps only partial starts getting new dimensions and new shades.

The mere existence of the criteria for Democratic Dialogue also offer some means to handle ethical issues of action research. All those concerned are confronted with the fine line between manipulation and workplace de-mocracy: Whose values? Whose objectives? What is the role of the action researchers? One basic principle of the Quality Network projects is that they are always started from scratch, in a phase in which everybody can partici-pate in the planning work. Secret preparations by any party to the develop-ment work are not accepted, because they quite certainly ruin the project.

Finally, concerning the technical aspects of the Democratic Dialogue, the researchers emphasize Criterion 13 ("The dialogue should continuously generate decisions that provide a platform for joint action") as a means to turn words into concrete action. This is done by making an interpretation that usually shared understandings of the need for change, and the tools to re-spond to that need facilitate the emerging of a committed and efficient way of working together. People seem to accept this, since they have a lot of experi-ence in being confronted either with hierarchical orders or resistance. (Some social psychological aspects of this matter are presented in Kalliola, 1996.)

The Work Conferences always produced at least some change plans that had been shaped by the voices of all the stakeholders. In the municipalities in which the method proved out to be somewhat out of place due to their tradi-tional organizational culture, the accomplishments were smaller; for example, a decision was made to improve the intra-organizational information channels and, in a more participatory environment, the plans could cover client-oriented, multi-sectoral service renovations (Kalliola/Nakari 2004: 97-100) among other things. In sum, the Work Conferences (and also other dialogue forums) were seen as emerging forums for mutual learning as well as plat-forms for shaping practical action. (Source a, Kalliola/Nakari 1999: 151).

6. Providing and evaluating learning opportunities

As presented above, during the Quality Project in 1991-1993, and when the Quality Network phase started in 1995, the understanding of learning was closely tied to the idea of Democratic Dialogue as a whole. Democratic Dialogue was seen as a requirement for equal opportunities for understanding and learning about relevant issues at the workplace, which emphasized the rights of the employees to have access to the knowledge that was traditionally reserved for the management only. Also the significance of the various types of languages used among municipal professional bureaucracies and on the different hierarchical levels was paid attention to in connection with learning. The researchers concluded that the method of Democratic Dialogue is supposed to prevent the problem of language hegemony, by giving a voice to all levels in the organizational hierarchy (source a), Kalliola/Nakari 1999: 151). The complicated and large phenomenon of language, connected to the formation of meanings, is taken into account in the basic premises of Democratic Dialogue (Gustavsen 1991), and is not addressed here any further. However, Criterion 7 ("It must be possible for all participants to gain an understanding of the topics under discussion.") is paid attention to. This criterion seems to lie in the concrete focus of all the above-mentioned conclusions made about employee involvement, and it was interpreted as being directly connected to learning opportunities and mutual learning (learning together, workplace learning).

The concrete realizations of this interpretation varied from case to case. Sometimes it was found relevant to offer continuous learning opportunities via dialogue forums, and sometimes even more concrete training was offered to some occupational groups.

In a case whose aim was to support a new decentralized management system in municipal schools, two of the basic problems identified were the professional culture of teachers to work alone and the absence of genuine discussion forums. As the actors of the schools did not know how to cope with their increased responsibilities as a rather independent profit centre, a need to jointly resolve the situation arose. Before the project, workplace meetings, which were intended for all staff members, were the only occasions when all staff members were present at the same time, but there was no

exchange of views, and information channels were open in only one way, top-down. As the project proceeded, the workplace meetings were upgraded into development meetings and discussion forums, where all staff members had an opportunity to talk about questions concerning the whole school, about factors with a bearing on the quality of working life, and to make decisions on development policies and take concrete development measures (e.g. bridge the gap between the lower and upper stages of the comprehensive school by rotating teachers, invite parents to attend the development meetings and involve also students in the planning of the school year) (Quality Project, comprehensive school, source a), Kalliola/Nakari 1999, 64-65, 70-72.).

In this project, a Work Conference was organized to involve all levels of the municipal hierarchy, including political decision makers, in the discussions on schools as profit centres. The researcher designated to work on the school case reported that "the first work conference paved the way to genuine dialogue", as the conference clearly revealed how shallow the language used and how ambiguous the concepts employed in management by results had been. The management valued the information they gained from the social collectivities of the workplace, acknowledging that learning had taken place:

"We have a clearer picture now of what's going on. And we're better placed now so that we can start to collect feedback from the field. And we're prepared to change our action strategy on basis of that feedback." (Education department manager at a work conference on 17 Sept 1993) (Rajakaltio 1999, 73-74, in source a), Kalliola/Nakari 1999).

In a case organization whose task was to develop municipal meal services, a Work Conference was used to elicit visions and models of re-organizing work that reserved the planning of the work ("thinking") to the foremen and managers only. During the conference, ideas were put forward to increase the planning element of the staff. In the last phase of the conference, representatives of six municipal kitchen designed tailored development programmes for themselves. Among the common elements, the following priorities were identified:

- Emphasizing the importance of customer orientation in the planning of meals services

- Improving the skills and competencies of the kitchen staff and increasing their authority over decision-making related to budget issues and to the implementation and monitoring of the budget.

The results of the Work Conference were summarized by the action researcher designated for the case as follows: "The target set out for the development effort was a customer oriented-operation that relies on staff skills and competencies and the further development of those skills and competencies." (Pesonen 1991: 90, in source a), Kalliola/Nakari 1999).

In the final evaluation of the Quality Project, the theme of employee involvement was one that was assessed in all cases. Based on the understandings of the Democratic Dialogue, the experienced gained in the case processes, interviews with the participants and reading the relevant literature, an evaluation framework was formulated around the concept of high involvement management (source a), Kalliola/Nakari 1999: 21-22; Kasvio et al. 1994, Lawler 1987: 3, 171.) The interpretation was that in the cases in which the ambition concerning employee involvement and work re-design (e.g. in the meals service case), the intensity of employee involvement could be measured as redistribution of information, knowledge, power (degree of employee involvement, delegation, degree of autonomy), as well as rewards. These principles were taken back into the empirical world of action research, in the cases in which the employees were given a charter to re-design their work by using the principles as guidelines. An example of this are the home care cases, in which the staff representing both social and health sectors planned the organization of their new multi-professional teams (Quality Network, home care for the elderly 1999-2001, source b), Kalliola 2003). The political decision makers declared the new team structure official after an evaluative Work Conference, respecting thus the employee voice, although the position of the nurses varied from team to team. Also, the teams were delegated the autonomy to supervise themselves, which was done by a circulating the authority to assign tasks (source b), Kalliola 2003: 16).

It can be concluded that the applications of Democratic Dialogue offered the participants a possibility to learn what Criterion 1 ("Dialogue is based on a principle of give and take, not one-way communication") means in practice. In most cases, the participants learned to involve themselves independently of

the hierarchical position of their profession and to give their input, to learn from others, to be heard, and to listen to others. For some employees, this might have been a process of emancipatory empowerment and, for some supervisors, a test of genuine participatory management. As learning was understood practically as a prerequisite for change, it was conceptualized as acquiring new knowledge, new attitudes and new skills that contribute to shared visions and shared action plans, which in turn contribute to the change. In the municipalities, dialogue forums were used for these purposes. Otherwise learning was taken for granted and not much attention was paid to the phenomenon itself.

7. From equal learning opportunities towards the characteristics of the organizations

The earlier neglect of the idea of learning was corrected in the course of the Life as Learning Programme (2002-2006). In the study circles organized at the Work Research Centre of the University of Tampere, studies on both workplace learning (or learning at work, learning organizations and organizational learning) and participatory action research methods were under scrutiny. There were two separate texts that turned out to be valuable in the further endeavours. Here "valuable" does not mean that they would have been the basis for all future conceptualizations, but they were significant in their ability to question the relationship between learning and change and, in addition, marked the transition from a very practical and concrete understanding of learning towards a more abstract level.

It was Gherardi (2001: 131) who pointed out several biases in the quality of the research in organizational learning. Among these biases there is the assumption that learning is understood as being synonymous with change. Gherardi argues that it has become customary to state that if a significant change is produced, learning has taken place. She argues further that this type of reasoning is to ignore the fact that many organizational changes occur without any learning taking place and, vice versa, that learning processes may not give rise to change. Although the reasoning in the Quality Project and Quality Network had not been quite as biased as suggested by Gherardi

(because the municipal participants were purposefully learning to make changes), her point was taken, and the researchers started to examine the roots of their intervention methods from a whole new perspective.

What was detected was that idea of learning was deeply embedded in the socio-technical origins of the Work Conference method. The researchers turned to Trist (1978: 394-395), who has argued that development cannot take place unless opportunities for organizational learning are built into all the organizational activities on all hierarchical levels. According to source c), (Kalliola/Nakari 2003: 107-108), Trist's (1978) "opportunities for organizational learning" were conceptually tied to Work Conferences and further to purposefully created "public spheres for discussion" (Pålshaugen 2002).

An empirical equivalent for this would be that dialogue forums and other action research interventions (which would not exist in the municipal organizations without the interference of the action researchers) would be built to complement the traditional organizations and that, after this, the learning opportunities would exist. After combining Trist's (1978) ideas of learning opportunities with a more recent conceptualization of Pålshaugen (2002), we were in the same research domain that had produced the idea of Democratic Dialogue, and still today see it as a useful tool in enhancing the learning potential of work organizations.

One more step was taken. That was to combine Pålshaugen's "public sphere" offering learning possibilities along "discursive democracy at work" to the idea of three interacting and partly overlapping organizational systems, namely the production, bargaining and development systems by Colbjørnsen and Falkum (1998, 43-45). "Public sphere", the learning arena, would be part of the development system. (Source c), Kalliola/Nakari 2003: 108).

Kalliola/Nakari (2003) was the first conscious step towards an attempt to capture the preconditions for learning in municipal organizations. Along with it, the focus shifted, from concrete development procedures, to those characteristics of organizations that either promote or hinder learning at work.

8. The new emphasis on the organizational context

In the history of Quality Project and Quality Network, the conceptualization of municipal organizations has undergone some transformations. However, some traces of the present understanding and conceptualizations can be found in all chosen approaches.

In the early phases the emphasis of the action research interventions was on the bottom-up development, along the lines of high involvement and employee discretion. The researchers critiqued the tradition of top-down development, neglecting workplace innovations, and showed how the main obstacles to genuine development were the hierarchical and divided structures of professional bureaucracies. The practical evidence of this is derived from cases in which bottom-up development hit the "development ceiling" or in which the management did not participate in the project, although an official permission to conduct the project had been given. Also, the researchers saw how the development results did not diffuse from one workplace or one service sector to another. The reason for this was the missing cooperative crossover within professional borders with their various gatekeepers, including the shop stewards of local trade union branches. Along with the participation of top management and the supervisors, the input of political leaders was found important in implementing a satisfactory development process in a multi-level and multi-actor organization.

According to the concluding chapter of source a) (Kalliola/Nakari 1999: 151-152) "it was clear that the Quality Project did not pay sufficient attention to the many municipal gatekeepers involved in the development sphere. /.../ During the second phase, the role of the potential gatekeepers has been examined in detail, even before the projects got underway. This has implied a preliminary, target-specific conceptualization of the project unit from the vantage point of power, the purpose of which is to facilitate the involvement and commitment of all crucial gatekeepers from the preparatory negotiation onwards." (In this article this issue was addressed from another point of view in explaining the attempts made to find "all those concerned".)

During the self-evaluation research of twenty-five Quality Project and Network cases conducted independently of the efforts to conceptualize learning, a new need to exceed the earlier conceptualizations of municipal organizations emerged. In this self-evaluation the notion of gatekeepers was changed into the notion of municipal power elites and the "development ceiling" was seen as a consequence of development that was not connected to the actual future strategies and emerging survival policies of the organization (Kalliola/Nakari 2004: 3-8; Pollitt/Bouckaert 2000). After that, there was only a small step to applying the kind of conceptualization of municipal organizations that had been useful in the context of workplace learning.

The researchers turned back to Colbjørnsen and Falkum (1998: 43-45) as well as Pålshaugen (2002) and realized how the idea of three interacting and partly overlapping organizational systems, namely the production, bargaining and development systems, would properly explain many previous findings.

Their realization was that the potential of a development organization, or discursive democracy at work, to affect the modes of operation, the organization of work and the ways of serving the citizens, for example, is dependent on its relationships with the other two organizations. As much as employees value discussions in general, they also value the concrete steps taken on the basis of the discussions. This approach was used in source d) (Kalliola et al. 2006), and explanations could thus be given to the phenomena of words turning, or not turning, into action.

Together with another case, Kalliola et al. (2006) present a children's day care case from the period 2004-2006 in a municipality that has been participating in the Quality Network since 1997. The case in question was initiated in a situation where there were plans to use fifteen day care centres as pilots in a transition process towards the contractor (commissioner-provider) model, which would have meant establishing rather independent day care centre clusters that would also become profit centres with their own budgets and client families. The city allowed a short pilot period for the new model, but no proper evaluation before launching the model in all day care centres. After collecting information about the hopes and fears about this new managerial model through a survey, the project group decided to organize a Work Conference to find ways to cope with the new model with budget responsibilities

and client orientation. The criteria for Democratic Dialogue were introduced in advance to the participants. In the conference, the staff made concrete plans to proceed towards their new type of organization. Their plans covered, among other things, the cooperation between day care centres of the same profit centre cluster, services offered for children coming from different age groups and on-the-job-training concerning budgeting skills. The chief shop steward, who did not work for any of the pilot centres, claimed that also the other day care centres needed a chance to change things in a participatory way.

The plans were immediately introduced to those not able to participate. Two weeks after that, a decision had been made to apply Democratic Dialogue to facilitate the adoption of the new model at all day care centres.

According to one interpretation, there were two key factors that enhanced the discussions and turned words into action in the day care case: first, the top management needed an action strategy which was created by means of the conferences, and second, the employees learned to understand that the profit centres would really be given the autonomy to implement their plans. This happened after employees' doubts and fears had been properly dealt with and after the staff were ready to receive also new information.

In the theoretical language adopted for the case analysis, the point here is a good co-operation between the development and the production organization. When the co-operation with the bargaining organization is fruitful, also the gatekeepers of local trade union branches give their input to promote the planned changes. According to an original source, also other supporting factors were found: " /.../ Day Care Centers succeeded better due to their earlier experiences in this type of communicative processes: the earlier dialogue episodes supported the new ones. /.../ The urgent need to survive in the hectic change and the commitment of top management led to the fact that the learning and agreements reached in the development organizations were put into practice very soon. Along with the adoption of new working models, the social bonding and trust grew, and the changes that followed were even easier to conduct. Also a positive input of the trade unions could be traced." (Source d), Kalliola et al. 2006: 475).

A fruitful co-operation between the development, production and bargaining organizations is closely tied to the future of the development: words put into action give a positive signal to all participants, and trust may emerge and grow among them. This in turn gives an impetus to organizing a new Work Conference, aimed perhaps to evaluate the earlier actions, and thus dialogue forums may find their place as permanent development structures and spaces for learning. In short, the co-operation between the three systems secures change.

9.   Workplace learning as a choice and voluntary commitment

It has been shown how the learning of the action researchers is not linear, although there may occur some consequent reasons for them to start renewing their skills to conceptualize the empirical phenomena that they encounter during action research processes. There is one more theme to reflect on before concluding this learning narrative.

The narrative will continue from the idea of Work Conferences and other dialogue forums as purposefully created public spheres enabling learning in organizations that are hierarchical or contain other characteristics constraining learning. When public spheres are conceptualized as "spaces for learning", they open up a possibility to continue along the line offered by "space". In sources d) and e) (Kalliola et al. 2006; Kalliola/Nakari 2007), "spaces for learning" were connected with discussions on multi-dimensional spaces consisting of physical, social and mental aspects (Lefebvre 1998). Thus "space" was seen as a network of relationships, which shapes interaction between those included in the space given.

Having understood the Work Conference as a space, the researchers noted that complying with the criteria for Democratic Dialogue changes social relationships and mental aspects to a degree that makes the conference favorable for participatory learning opportunities. However, they also made the observation that although the dialogue forums often produce positive outcomes, they are not free from constraints. Following Billett (2004), it was acknowledged that learning would only take place through voluntary prac-

tices, to which people commit themselves according to their notions of power and interests.

According to the practical experience of the researchers in the Quality Project and the Quality Network, there are at least two prerequisites that facilitate the commitment: a) the need of change is recognized as necessary for the survival of the organizations and b) the discussion must deal with issues that are directly connected to the change. There are cases in which the outside pressure is so high that people start to look for ways to reform their organizations. Thus, in a survival game, a development project can be seen as an opportunity for both the management and the employees. This kind of explanation was given to the success of Democratic Dialogue in the day care case in its hectic process to transform itself to meet the requirements of the contractor model (source d), Kalliola et al. 2006).

Also the issue of "right people" has been on the agenda in the earlier phase of these reflections. There have been a few cases in the history of the Quality Project and the Quality Network which seem not to have had the right people or commitment to change, because the issues to be solved contained too much organization cultural heritage. One of these cases represents the care of the elderly (source e), Kalliola/Nakari 2007).

In the care of the elderly, both the inside (budget cuts, productivity) and outside (citizen orientation, the human values) pressures have lately been enormous, and municipalities have turned to the Quality Network to find proper tools to meet the challenges. The aims and means to improve the care of the elderly have varied and the methodological approaches offered have been somewhat different depending on the prevalent ideas in use. A multi-professional team structure has been among the regular answers and, therefore, diffusion took place from the case presented in source b) (Kalliola 2003) to a new case. A totally different approach was adopted in yet another home care case, in which a joint home care unit was already established and collaboration was started with municipal cultural services, including theater. The comparison of two home care cases is presented in source e) (Kalliola/Nakari 2007).

According to source e), Kalliola/Nakari (2007, 191-192), the comparison is made by reframing organizational and occupational cultures from a learn-

ing approach. In the footsteps of Lefebvre (1998) and Hernes (2004a, 2004b), an attempt is made to understand the characteristics of cooperation difficulties between different professional and occupational groups.

In the analysis of the proceedings of the action research projects, the dialogue forums were conceptualized as learning spaces and the differences in professional cultures as "thresholds". In Hernes's conceptualization, "thresholds" cover mental, social and physical boundaries, which also have their classic interpretation in organizational theories. The results revealed how the professional cultural confrontation between the social and health sectors was more severe, and the thresholds were higher than between the home care staff and the cultural sector professionals. It could be concluded that applying Democratic Dialogue is not always enough, although it can be adopted as a regulative norm and can thus engage the participants in reflecting on the mental and social spaces of their own.

During the project, the health care staff did not commit themselves to the planning of multi-professional teams on the steering group level and in a joint workplace forum. When the team structure was forced into action on the higher decision-making level, the health care workers had to comply, although they did not want to be drawn into the same realm as the social sector. (Source e), Kalliola/Nakari 2007, 196). On the other hand, the cultural workers found it interesting and worthwhile to start pondering what "old age" means, what they could offer to people receiving home care services and what new competencies they should acquire. (Source e), Kalliola/Nakari 2007: 197-199).

10. Conclusions

This learning narrative of action researchers demonstrates how practice and theory complement each other. At the same time, it must be admitted that researchers are really challenged by the older, or even classic, research traditions and the ever present societal challenge to produce something new. In this narrative, all due respect is given to those scientists whose research efforts and literature made this endeavor possible.

The practical impetus to start reflecting on the past research experience of the author was the continuous positive feedback on Work Conferences. It made the researchers wonder what the key factors contributing to the good results actually are. Conceptualizing Work Conferences simultaneously as learning spaces consisting of physical, mental and social aspects, and as development organizations connected to the production and bargaining organizations, sheds light on these factors.

As the municipal organizations are characterized by many borders, the Work Conference method has turned out to be suitable in bridging these gaps. All municipal actors may use the conference method as a tool to promote organizational change in a way that secures everyone's equal opportunities to be heard and to influence decisions. In a genuine dialogue, shared visions are not reached by voting, but by listening to and understanding other people's arguments. Today the dialogue methods have gained favour also in some private organizations (Ala-Laurinaho et al. 2008) where the steps from discussion towards concrete action are often taken faster than in public bureaucracies.

There are many possibilities, which have also been used, to involve clients or citizens in dialogue forums, and to invite them to discuss with the people in charge of the services provided. This means that also the research reports on action research could be written using different perspectives, not only those of the organizational actors or the researchers.

One could argue that this kind of participatory action research approach meets the quality criteria for critical and emancipatory educational action research put forward by Kemmis (2006: 471). Although the criteria for Democratic Dialogue may seem very pragmatic or technical, in them there lies great and flexible potential to create networks of communication constituted for public discourse in public spheres.

According to the experiences gained in Finnish municipalities, the pragmatism included in the ideas of Democratic Dialogue is useful pragmatism that enables many specific organizational needs to be addressed collaboratively (Greenwood 2007). Many of the research projects showed that participatory action research has a strong potential to be an agent of organizational change. This is promoted even more in certain conditions in which the dia-

logue forums find their place as spaces for workplace learning, and consequently as permanent organizational structures.

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