Workshop

The use of Peter Checkland's FMA model (the organized use of rational thought) and its practice in systems and action research

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Context: the process of inquiry and practice and theory

Checkland's (1985) contention

A rational intervener in human affairs would not be able to separate theory and practice

Theory leads to practice, which generates understanding of theory

This led to the development of the model of the organised use of rational thought:
- a researcher or intervener comes to a problem context with some ideas in an intellectual framework (F), and
- a way of applying those ideas via a methodology (M)
- to an area of application (A)

In taking intervention action, there is learning generated about all three elements, F, M and A

Checkland, P.B. 1985. From Optimizing to Learning: A Development of Systems Thinking for the 1990s. Journal of the Operational Research Society, 36(9): 757-767.

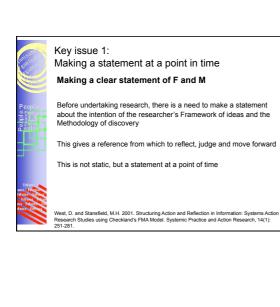Context: the process of inquiry and practice and theory
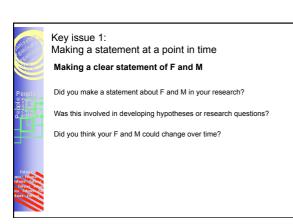
Reflect on Checkland's contention

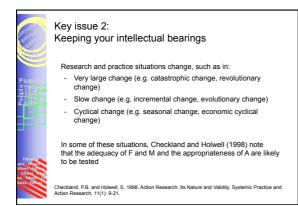In undertaking your own research, can you see where you have applied FMA?

What were your frameworks of ideas?

What was your methodology in each case?

Do what area or arena did you apply your research?

Key issue 1:
Making a statement at a point in time

Making a clear statement of F and M

Before undertaking research, there is a need to make a statement about the intention of the researcher's Framework of ideas and the Methodology of discovery

This gives a reference from which to reflect, judge and move forward

This is not static, but a statement at a point of time

West, D. and Stansfield, M.H. 2001. Structuring Action and Reflection in Information: Systems Action Research Studies using Checkland's FMA Model. Systemic Practice and Action Research, 14(1): 251-281.

Key issue 1:
Making a statement at a point in time

Making a clear statement of F and M

Did you make a statement about F and M in your research?

Was this involved in developing hypotheses or research questions?

Did you think your F and M could change over time?

Key issue 2:
Keeping your intellectual bearings

Research and practice situations change, such as in:

- Very large change (e.g. catastrophic change, revolutionary change)
- Slow change (e.g. incremental change, evolutionary change)
- Cyclical change (e.g. seasonal change, economic cyclical change)

In some of these situations, Checkland and Holwell (1998) note that the adequacy of F and M and the appropriateness of A are likely to be tested

Checkland, P.B. and Holwell, S. 1998. Action Research: Its Nature and Validity. Systemic Practice and Action Research, 11(1): 9-21.

Key issue 2:
Keeping your intellectual bearings

In the face of such change, how do we keep our intellectual bearings?

What factors contribute to keeping our framework of ideas relevant, up-to-date and progressive?

What factors inhibit us from re-thinking our intellectual frameworks?
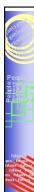

Key issue 3:
Learning about feedback on our F, M and A

Experience from the Monash Action Research cohort in large action research projects in 2001-02 was that there are at least three forms of reflection involved in FMA

Jack Mezirow's (1991) model of transformative learning was integrated with FMA:
- Content reflection (related to A)
- Process reflection (related to M)
- Assumption reflection (related to F)

The integrated model is conceived by Sarah et al (2002) as a meta-cycle of inquiry

Mezirow, J. 1991. Transformative Dimensions of Adult Learning. Jossey-Bass, San Francisco, CA.
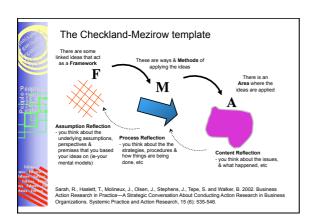

Key issue 3:
Learning about feedback on our F, M and A

Which forms of reflection do you apply in your own research and work?

Do you spend more time on content reflection, process reflection or assumption reflection?

Or, do you reflect on the whole and integrate these forms of reflection?

How can this form of reflection help researchers and practitioners?

The Checkland-Mezirow template

There are some linked ideas that act as a **Framework**

These are ways & **Methods** of applying the ideas

F

M

There is an **Area** where the ideas are applied

A

Assumption Reflection
- you think about the underlying assumptions, perspectives & premises that you based your ideas on (ie-your mental models)

Process Reflection
- you think about the the strategies, procedures & how things are being done, etc

Content Reflection
- you think about the issues, & what happened, etc

Sarah, R., Haslett, T., Molineux, J., Olsen, J., Stephens, J., Tepe, S. and Walker, B. 2002. Business Action Research in Practice—A Strategic Conversation About Conducting Action Research in Business Organizations. Systemic Practice and Action Research, 15 (6): 535-546.

Key issue 4:
Transformed thinking from reflection

The Monash cohort experienced substantial transformation of their projects by using the thinking behind the template

In my research this led to new understanding about F and M

My framework of ideas was expanded by understanding the impact of economic and political meta-cycles on organizational decisions

Another key learning was about the importance of the resilience of the researcher, particularly in undertaking action research

Molineux, J. and Haslett, T. 2002. Working within organizational cycles – a better way to implement action research projects in large organizations. Systemic Practice and Action Research, 15 (6): 465-484.

Key issue 4:
Transformed thinking from reflection

How does reflection refocus action?

How can reflection change methodology, particularly when it is already underway?

How does evidence from the area of action and the operation of the methodology in practice contribute to reframed ideas?

How can this be integrated?

Relevant Checkland Readings

Checkland, P.B. 1981. Systems Thinking, Systems Practice. John Wiley & Sons, Chichester.

Checkland, P.B. 1985. From optimizing to learning: A development of systems thinking for the 1990s. Journal of the Operational Research Society, 36 (9): 757-767.

Checkland, P.B. 2000. Soft Systems Methodology: A Thirty Year Retrospective. Systems Research and Behavioral Science, 17 (S1): S11-S58.

Checkland, P.B. and Holwell, S. 1998. Action Research: Its Nature and Validity. Systemic Practice and Action Research, 11 (1): 9-21.

Checkland, P.B. and Holwell, S. 1998. Information, Systems and Information Systems. John Wiley & Sons, Chichester.

Checkland, P.B. and Scholes, J. 1990. Soft Systems Methodology in Action. John Wiley & Sons, Chichester.