

THE BALANCING ACT

Authors' Suggestions for Using Case Stories

Strategies such as individual task followed by discussion, small groups plus plenary, group brainstorming and role play are described in the 'How to Use Case Studies' section of FIRST. These strategies may be employed in using case stories.

However, the personal nature of a case story lends itself to a different style of session using a story/dialogue approach, which Coralie and Barbara describe below. They offer plans for a 90 minute and a four-hour session. First, there are some explanations of strategies and materials which apply to all of the workshop plans, and then the plans themselves. Finally, there is some more discussion of groupwork, a rationale for story-based groupwork, and a list of references to help prospective leaders better understand this approach.

Factors Affecting the Success of The Case Story Workshop

In common with other workshop processes, the success of the story/dialogue approach is affected by factors such as the familiarisation of participants with the workshop purpose, content and process prior to implementation. Further, willingness to collaborate and trust is essential in order to explore problematic experiences, question assumptions and for participants to challenge previously entrenched ways of thinking and being as a student/supervisor.

The success of the story/dialogue approach is also related to the participants' willingness to engage in interactive reading. In common with Sarup (1989) we believe 'reading has lost its status as a passive consumption of product' (p.3). Case stories are not 'fodder' to be received passively and consumed unquestioningly. Bochner and Ellis (1996) suggest that readers, rather than adopting the role of spectators, be open to 'feel, care and desire' as they read (p.24). Openness involves active listening, suspension of judgement, respect for others' experiences and points of view, and a willingness to delve deeply into themselves to examine the assumptions and the myths of their own stories exposed through the case stories.

This approach to groupwork makes particular assumptions about ways of thinking and being. Participants holding different values, or styles of supervision developed within alternative contexts, may not feel comfortable within a story-dialogue context. Working in such an environment is not without risks. Initiating dialogue with others, and within ourselves, about our self-story, can reveal hidden parts of our narrative identity that until that point in time had remained unresolved and/or unapproachable. Skilled co-facilitation to 'read' the group, both at the start of the process and during its implementation, can facilitate an appropriate degree of risk-taking through revelation. It is an important feature of the workshop, however, that the use of 'one-step removed' case stories enables revelations to be taken on personally, rather than in the public process inherent in the 'confessional' workshop. Facilitators need to plan careful closure of the workshop process and be alert to the need for on-going processes to support participants further in this dynamic personal/professional reflexive process.

It should be noted that condensing the process to ninety-minutes can create particular problems. For example, participants usually find it easy to analyse the case stories, as analysing data is central to the academic experience. However there may be a tendency

to quickly label and categorise the subject of the case story as 'other'. This can lead to an analysis of the story in a disembodied way that does not acknowledge or respect the contradictions and constraints faced by 'real' people.

It is important to remind participants (especially in the 90-minute version) that there is a balance to be maintained in the analysis. If the person told the story in person, in the usual support group process, we would listen, support, suggest and encourage, but we would not usually be willing to probe, to challenge and to confront. Analysis is driven by the lead of the participant telling the story, and in most cases the focus rightly remains on the person telling the story. Therefore we do not overtly compare our own story to that of the person exploring their story. In contrast, through the narrative approach to groupwork when the person is not present we can analyse, dissect and fully interrogate the story. It is often through this process that we can name the discourses that drive the telling and recognise both the opportunities and constraints that they present. However participants must be encouraged to acknowledge that this story was merely a snapshot in time of a postgraduate's experience - the person is not statically and permanently defined by the discourses. They have merely illustrated one of the many and moving constellations of the construction of realities.

How to Facilitate a Reflective Discussion

Unlike the unstructured questions that form the basis of a loosely facilitated discussion, participants in a reflective circle use a structured approach to questioning. This approach is based on the three elements - describing the experience, attending to feelings and interrogating the story - that Boud, Keogh and Walker (1985) suggest are the key features that turn experience into learning. Rather than inviting the correct answer, such questions open the learner to 'new perspectives on an experience' and can lead to 'changes in behaviour' (Boud, Keogh and Walker, 1985, p.34). This questioning process helps participants to uncover their own assumptions and constructs (myths) about what they do as postgraduate supervisors or students.

A reflective discussion group (or reflective circle) is a small group of participants who, after reading the case story individually, reflect upon the story and how the issues it addresses are similar to (or different from) their own experience. Group members can use the 'Describe the Experience' questions to guide their reflections at this stage. The group members then move into a structured dialogue using the other levels of reflective questioning.

Levels of Reflective Questioning

(These are the questions which comprise Handout 1.)

Describe the Experience

What in your words, is the story being told here?
What is the point of the story?
To what extent is this also your story?
In what ways is it different from your story?

Attend to Feelings

What feelings did the story trigger?
What do those feelings reveal about the experience of the storyteller?
What do those feelings reveal about your experience?
What positive responses are in the story?
How do you feel about these responses?
Are some responses not present? Which ones?
Why might they be absent?
How do you feel about their absence?

Interrogate the Story

Are there words or concepts that suggest a particular world view?
Which cultural values are elevated in this story?
What ways of being have been elevated in this story?
What might be the history of these ways of thinking?
What other ways of being and thinking are made invisible by this way of thinking?

Example of how questioning might unfold during a discussion

On one level, facilitating the group discussion is little different to other facilitation roles. As in all groups, it is important to ensure that group rules are discussed, that people have the opportunity to meet others in the group and that they understand how the group process is expected to develop.

It is the questioning technique in this approach that may require some further consideration before you implement the group. There are a number of professionals exploring and extending narrative models for questioning - see for example the wide range of application on the Dulwich Centre web-site - www.dulwichcentre.com.au.

In the examples below, the story of Ingrid is used to give examples of how the questioning may unfold.

Describe the experience

What in your words, is the story being told here?

Initially a group may simply describe the story without critical analysis. In this case the leader is interested in generating what Michael White calls “*thick rather than thin descriptions*” - for example,

Participant (P): Well she is inexperienced and so she shouldn't expect more of herself, she has learned already that there are at least two types of students, so I agree time will tell.

Leader (L): Is that all she's learned - seems to me as if she has taken on a few other messages about being a supervisor.

P: For sure - she certainly seems to feel as if the responsibility for a good student/supervisor relationship falls mainly on her.

L: Yes...What clued you in to that?

P: Well for example when she said:

I am doing my best to practice all that I have read about effective supervision, try to listen carefully and use my academic judgement about the methodological soundness of the proposal, the logistics of completion and the ethics of the project. When disagreement occurs about any of these issues both novices become agitated. I try to centre myself, seek advice from more experienced supervisors and think of the best way of negotiating a change of plan. Either this works smoothly or all hell breaks loose.

You can just hear how she is trying to be so good - it's all on her!

L: Mmm – I see what you mean, so what's that all about?

The leader here is trying to open up the thinking and with the last question has invited the participant to connect the story to other issues such as the construction of a 'good' academic or is it a 'good woman' or is it a 'high achiever' or is it ...? The group will take it further, depending on the positions and resources within the group, and most importantly, they will link their analysis to their own prior knowledge and it is in this way that the group discussion moves to another level of value for the participants.

Following this discussion the leader could move into the next questioning level, ie *to what extent is this also your story? In what ways is it different from your story?*

Attend to feelings

What feelings did the story trigger?

P1: She's really too inexperienced to be a supervisor if that is how she feels - if I was in her university, I'd put her back to UG teaching until she gets over her own PhD!

L: So what feeling do you have here? [the participant is staying clear of naming a feeling, but rather is judging - a not uncommon reaction to this question]

P1: Pissed off with her - honestly perhaps we can't all be supervisors - if you don't like the heat, get out of the kitchen!

P2: I don't think that's fair - as she said, how DO you learn to be a supervisor. It's an awful situation and it just isn't recognised in most unis.

L: So P2, how do you feel about the story [for a different reason P2 also hasn't moved to interrogate the *feelings*]

P2: I guess I sort of felt sorry for her - she seems to have done everything she could have and I just don't know how it could be any better for her. If it was me, I think I'd find it hard to take on another student without some sort of support.

P1: Well, that is why I said she should go back to UG for a while - after all the stress of your own PhD is huge and she could do with a break. Poor bugger, was probably like me, studying full-time, working full-time - you can't expect miracles, she might just be exhausted.

Once again these two participants have moved through discussion and skilled questioning from the leader. P1 has named his own responses to the stress of academic work and P2 is starting to name the need for a range of support systems for the new supervisor. The discussion has multiple possibilities from here.

Interrogate the story

Are there words or concepts that suggest a particular worldview?

P1: absolutely! Listen to this:

Instead of finishing my doctoral studies inflated with confidence and expertise I ended this journey feeling wounded and exhausted, somehow damaged by the lonely, isolating journey.

She is really naming it here - the emperor has no clothes! She doesn't focus at all about her contribution to the field, to new knowledge or to her new status in the academic community. I mean she does say:

This is not to say that I am not satisfied or proud of the outcomes or skills and knowledge acquired.

But that is all she says, just one line. It really does seem to me if that is the key point here - PhDs may not be what we think they are, a goal! They are actually mainly a journey and this Ingrid shows that, for sure.

L: does this show up anywhere else in the story?

P3: Well, yes, she keeps referring to the journey throughout and that is fine, but it does seem that she does not take on the final achievement of completing a PhD - it is almost invisible to her. She is so focused on the journey, her own and that of her students - worth thinking about how she would react if she thought a bit more about the goal here.

Generating themes using insight cards

As the group discusses a case story there will be moments when an individual participant responds with an a-ha! This is now the goal for the whole group - to search for insights or a-ha's. These ideas will be recorded on 'insight cards' which will ultimately be clustered together to document themes as determined by the whole group. Before commencing this process, it is important to help participants clarify the difference between an effective and a non-effective insight card. Each insight card should contain enough detail to make it understandable to someone who is not part of the group and should open to the reader possibilities for action rather than generalisations that do not move beyond description. Insight cards should be practice-orientated. The example below illustrates this principle.

Non-effective example: need to set better priorities

Effective example: need to analyse and acknowledge the different types of competing priorities

Depending on the size of the group it may be most effective to develop insight cards in small groups, then return to the large group to categorise the cards into themes. This standard approach to data analysis may generate new insight cards as well as clustering the ones developed by the small groups.

Closing the discussion

As a constructive conclusion to the workshop the use of photographs provides a vehicle for participants to choose an image to represent their future approach to any problematic aspect of their experience. One useful tool is the Photolanguage Kit (Cooney & Burton, 1986) - a set of over one-hundred black and white photos of Australian images. There are similar kits available using other culture's images. The visual image as metaphor encourages each individual to speak about how that image enables them to move forward in a positive way. A participant can then seek a similar image to have in their own environment as a physical reminder of the new way of seeing that will support their new way of being. Participants who do not relate to the images presented can be encouraged to create a verbal metaphor or to describe the image that will guide them. Alternatively, participants could be invited to share a new goal they have developed from the workshop, or more simply to share one positive thing that they will do for themselves in the following weeks.

Plans for a Facilitated Group Discussion of a Case Story

Preparation

A comfortable, private venue with room to break into small groups and if possible tea/coffee to facilitate the interaction of participants during/after the workshop process.

Copies of the selected case stories for all participants (These are in separate pdf files under the heading The Balancing Act on this site.) Group leaders decide which stories are most relevant to the group prior to the session. During the session they very briefly describe the stories they have chosen and let participants decide which of those stories they wish to consider in depth.

Copies of the reflective questions to be used in discussion groups (These are in Handout 1 at the end of this pdf file.)

Overhead projector, butchers' paper, small file cards, blutack, whiteboard and markers.

Photolanguage Kit or a collection of photos, scenes and images from magazines (optional).

A tape recorder for groups that choose to tape-record the discussion for later analysis (optional).

Group size

The ideal group size for this process is 10-12, however it is possible to work with larger numbers by breaking into smaller groups each with their own leader for the reflective circle and the generating themes work. It is then necessary to allow extra time for the groups to report back and to synthesise the themes they discover. Although this workshop can be led by one person, it is preferable to have co-leaders. This enables a more effective process, especially in the reflective discussions and themes development.

Plan for a 90-minute session

Introduction (10 minutes)

- ❖ Introduce the leaders and explain the format of the workshop. Do not have a coffee break but it is good to have tea and coffee in the room for participants as they work.
- ❖ Explain group rules - confidentiality, equal participation, mutual respect.
- ❖ Ask each person to introduce themselves with their name and the extent of their experience of supervising research study (or being supervised).

Setting the Scene (10 minutes)

- ❖ Explain the overall approach of the workshop.
- ❖ Clarify that the workshop will focus on the reflective circle and generating themes and that you will ask them to think through the “so-what” and “now-what” questions for themselves as a follow-on from the workshop.
- ❖ Describe the case stories chosen for this group (very briefly).
- ❖ Ask participants to divide into small groups, each agreeing to work on one of the case-stories. It is OK for small groups to choose the same story.
- ❖ Distribute copies of the reflective discussion questions to all participants. (Handout 1)

Small Group Structured Dialogue (15 minutes)

- ❖ Ask the participants to spend 5 minutes reading the story and noting their responses, questions and feelings in the margin.
- ❖ Each group should then use the handout questions as a guide for carefully considering the story. As there will not be enough time in the abridged workshop to examine all of the levels, it is best if participants choose the levels most relevant to them.

Large Group Identifying Themes (45 minutes - 15 minutes per story)

- ❖ With one leader facilitating and the other recording on butchers paper or Powerpoint, lead the group through a shared analysis of the elements of one case story.
- ❖ Although beginning with the relevant small group, involve all groups in the analysis.
- ❖ As the group will have not had time to focus on all of the reflective questions, draw out any areas that have not been addressed.
- ❖ Throughout the discussion, invite the participants to consider if and how similar themes may be impacting on their own story.
- ❖ Repeat the process with each of the chosen case stories.

Beginning a Synthesis (5 minutes)

- ❖ Invite the group to consider any themes or story elements that may be common across the case stories.
- ❖ Suggest that each participant consider how this exercise may highlight issues for their own experience, encouraging them to discuss this further with colleagues at another time and/or raise the insights with their students or supervisor.

Closure (5 minutes)

- ❖ Ask each person to share one “a-ha” or insight that they have gained; or
- ❖ Have a blank card for each participant, asking them to write within 24 hours one aspect of their current situation they would like to change and how they will go about making that change; or
- ❖ Have a cartoon or similar handout that relates to the workshop focus.

Plan for a four-hour discussion

Introduction (30 minutes)

- ❖ Introduce the leaders and explain the purpose and method of the workshop.
- ❖ Explain group rules - confidentiality, equal participation and mutual respect.
- ❖ Participant introductions: we recommend using a warm-up exercise which involves participants in telling a little of their own story as a researcher. In the longer version of the workshop the level of individual 'exposure' and depth of experience tapped through the reflective questioning of the stories is greater so we suggest taking longer at the introduction stage for participants to get to know each other and also to form a collective sense, as well as an individual sense, of participation.

The case story (5 minutes)

- ❖ Choose the case story - you may have a choice of case stories for the group to select from or you may have selected one case story in advance.
- ❖ Give a copy of the selected case story to each participant.
- ❖ Each participant reads the story and briefly notes their personal responses in the margins.

Sharing the case story: Structured dialogue via a reflective circle (55 minutes)

- ❖ Explain the structured dialogue approach and introduce participants to the reflective questions. Have the questions on an overhead or give participants individual copies. (Handout 1 below.)
- ❖ Break the group into pairs to discuss the case story (10 minutes).
- ❖ Using the questions as a framework, as a group examine the case story (if the group is large, it may be preferable to divide into small groups). The group may like to choose the questions from the overhead that they would like to focus on.
- ❖ Leaders may like to record major points on butchers' paper/whiteboard as the discussion progresses. In this stage it is important for the group leaders to manage the time so that all of the questions that they have selected for discussion are covered.

Break (10 minutes)

Generating themes: The use of insight cards (60-90 minutes)

- ❖ Explain the concept of insight cards, using examples on an overhead.
- ❖ Divide the group into working teams (ideally 3-4 groups) to develop their own insight cards.
- ❖ Each group reports to the large group.
- ❖ The large group then discusses how to further develop and categorise the insight cards.
- ❖ Document this synthesis and circulate to participants.
- ❖ Summarise the group's findings.

Break (10 minutes)

Re-visioning (30 minutes)

- ❖ The aim of this section of the workshop is to give each participant the opportunity to develop a positive image to support them in the postgraduate experience.
- ❖ Photos from the Photolanguage kit can be placed on the floor and participants invited to select an image that resonates for them. If the Photolanguage kit, or similar, is not available, participants can be invited to discuss in a pair an image that they will develop as a positive metaphor—natural images of landscape or images of a journey/map are particularly effective.

- ❖ Each member is then invited to share their image with the group.

Closure (10 minutes)

The sharing of the photo images may function as a closure exercise, however if time permits, participants could be invited to share a new goal they have developed from the workshop, or more simply to share one positive thing that they will do for themselves in the following week.

Evaluation

Whatever the length of the workshop and case stories you choose you will be interested in how participants experienced the process. Participants' responses to the following questions could contribute to the on-going development of your workshop:

- ❖ What did you gain from participation in this workshop?
- ❖ Did the workshop enable you to develop new ways of thinking?
- ❖ How did you find the group process?
- ❖ Would you like to attend a follow-up workshop?
- ❖ Do you have any suggestions for improvement to the workshop process or design?

FIRST Case Stories
THE BALANCING ACT
Handout 1

Levels of Reflective Questioning

Describe the Experience

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Attend to Feelings

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How to develop your own case story

In order to write a useful case story, it is important to first determine the components that you wish to make available to the reader. You might be able to reflect on your own experience and/or your observation of the experiences of others and from this you can compile a list of *content points*.

Content points could include:

Personal level

- Values, goals and aspirations (see Bridget)
- Work, family and relationship context (see Geraldine)
- Points of 'difference'—gender, ethnicity, age (see Akiko)

Institutional level

- The specifics of a particular school or department (see Mary)
- The norms and traditions of a particular discipline or course (see John)
- Typical idiosyncrasies of staff/students/participants (see Samantha)

Contextual elements

- Funding situation
- Situations of change
- Unexpected barriers/blocks (see Marisa)
- Competing needs/priorities (see Rahni)

The next step is to consider your *story line* - will this be a heroic journey or a trial by fire; a compromise story or a story of dogged determination? Messy stories are good as they reflect the reality of lives. It is important not to simplify the story as those who are to learn from it will value the complexity and understand any lack of linear progression. However having said this, it is the role of the story line to weave a certain path through the story.

At this point, you are ready to create your *character*. What is her/his name? Where does s/he come from? What is s/he studying? What personality traits does s/he have? What learning style does s/he bring to the situation? Remember that at this point, you need to be sure that although you may be drawing on real people, all identifying information must be changed - although do not be surprised if when you use your case stories others say "Oh, I know who this is - it's...!" That is the sign of a well-constructed story as it has resonated with someone else to the extent that they are sure they know the person.

To write the story, you will use first person. In the first instance, do not worry about length; just get the story out. Then it is time to edit back to the key components, when it will be useful to work with a colleague who can give feedback on extraneous detail or missed opportunities.

Ideally your final story will be between 500 and 1,000 words. We do think it is a good idea to work with tested material, like the stories offered in The Balancing Act files, before you try to develop your own. You will be better able to predict how a group responds to such personal material.

Introduction to Groupwork

Since the 1960s and 1970s, when interest in groupwork accelerated through the personal growth movement, much has been written about aspects of groupwork, with a general consensus that the benefits of groupwork include the development of a shared sense of purpose or community, the increase of resources and perspectives beyond the individual and the potential for more creative solutions to be achieved. Groupwork to date has been effective through competency training and knowledge transfer in achieving the first two of the four pillars of education proposed by the UNESCO Commission for the 21st Century - learning to know and learning to do (1996). However, little attention has been paid to the final two, and arguably most important, pillars - learning to understand others and learning to be. Indeed, Douglas (1995) has noted that, with the exception of systems theories, most of our theoretical orientations to groupwork have emerged from theories of individual behaviour that have been extended to consider individuals in groups. This focus on the individual and her/his experience or learning/working/being has directed our attention to issues such as intra-group behaviours, personalities, norms, conflict, and leadership. Concomitantly, as adults who have learned to become experienced group participants, we come to groups ready to seek out the norms and to behave in a contextually appropriate way. The legacy of this focus on the individual means that we initially respond to group issues at an interpersonal level. We have learnt to psychologise our experiences and to 'confess' our issues once again at an individual level. However, if we acknowledge the individual's experience as culturally and historically located and constituted within the available discourses, such an approach to groupwork is both limited and limiting.

As group leaders and participants, we had often observed, and indeed experienced ourselves, the wonderful catharsis of 'confessing' our issues and concerns in a group. Feeling better for a while, then, when nothing else changed around us and as our individual planned changes did not succeed, we took on that issue once again as an individual and felt inadequate. What was not available in the types of groups that we had experienced was some process that invited each individual to explore the other sociocultural dimensions that informed their individual experience. Simply confessing concerns and inadequacies has limited value. For supervisors/students the focus of groupwork needs to be on analysing the complexity of the postgraduate experience; acknowledging that there are both individual and collective aspects that inform any reading of the experience. The story-dialogue process encourages participants to examine the metaphors and myths that construct the experience of postgraduate research.

Rationale for Story-based Groupwork

Bruner (1986) has argued that narrative is one of only two primary knowledge forms, the other being the paradigmatic form typified by scientific logic. To narrate a life experience is to tell a story and to create a story, in a way that is coherent to both the narrator and the audience. By appropriating, interpreting and retelling the past from the perspective of the present, the self constructs itself (Kerby, 1991). Further, this personal sense making must be acknowledged as a dialectic engaging the person within her/his cultural location. As people interact with the popular and marginal narratives of their culture, they learn how to regard themselves and how to make themselves intelligible to others (Gergen & Gergen, 1993).

To invite a person to share their story as a way of understanding that experience is not unusual. There are a number of ways that stories have been used in groupwork - from the simple telling of a story in order to speak out and name an experience (Linden, 1999)

through to the extensive analysis of stories over a number of sessions such as in collective memory work (Haug, 1987; Lee & Williams, 1999; McCormack, 1998). Storying is also a strategy used by therapists (White, 1997; White & Epston, 1990) and has parallels with the early conscious-raising groups of the 1970s and 1980s.

The notion of storying that forms the basis for this workshop approach takes a particular view of storying. In the traditional modernist therapeutic story, the individual is seen as the centre of the issue - her/his story may be appropriate or problematic, functional or dysfunctional; however, at the centre of most approaches is the belief that the individual must learn how to change her/his story to a better one. By locating the problem within the individual no account is taken of the discursive locations of that person and the impact of contradictory and competing discourses on the individual. A postmodern understanding of the issue allows a more complex awareness of the individual to emerge, and one that provides a constructive basis for groupwork. Unlike the conscious-raising groups, postmodernist groupwork does not aim to find 'THE Truth'. It recognises that supervision does not take place in a vacuum but rather is embedded within a particular cultural, historical and economic context.

Building on this postmodern understanding, the approach to storying we propose - the story/dialogue approach - enables participants to examine a constructed case story which has been collected or designed to contain elements of common experiences in a given setting or context. Through a collective examination of a case story, participants are better able to recognise the particular discourses that have led the story to be constituted in that way. It is hoped that they will therefore be in a better position to examine and (re)story their own experience.

Stories open to an individual (and group participants) the possibility of re-storying their life because stories have the potential to reveal both the individual and the collective nature of experience (McCormack & Pamphilon, 1997; Richardson, 1990, 1997). Stories act as a mirror - we learn about ourselves - but also as a window - a way of looking into the past, present and future experiences of others (Jalongo, Isenberg & Gerbracht, 1995). Searching for the individual and the collective aspects in stories encourages readers to examine and question their own experience by searching for commonalities and differences in the experiences of the storyteller.

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