EXPLORING INDEPENDENT HUMAN RESOURCE DEVELOPMENT

CONSULTING PRACTICE AND EXPERTISE IN COLOMBIA THROUGH

REFLECTIVE PRACTICE

A Dissertation

by

LAURA VICTORIA CAJIAO MARTINEZ

Submitted to the Office of Graduate and Professional Studies of
Texas A&M University
in partial fulfillment of the requirements for the degree of

DOCTOR OF PHILOSOPHY

Chair of Committee,	Khalil Dirani
Committee Members,	Beverly Irby
	Rafael Lara-Alecio
	Michael Beyerlein
Head of Department,	Mario Torres

May 2018

Major Subject: Educational Human Resource Development

ABSTRACT

This qualitative study explored the learning experiences of independent HRD consultants that helped them improve their practice and develop expertise. In addition, my aim was to provide a framework about the (a) consulting business, process, and services, (b) profile of independent consultants, and (c) knowledge, skills, and attitudes required to be an effective consultant in Colombia. Findings of my study were presented based on the three research questions proposed. Learning from experience highlights the importance of reflection. Reflective practice, in particular, is key for professional development and continuous learning, benefiting independent HRD consultants with opportunities to reflect and identify strategies to constantly improve their practice and develop expertise. Benefits of reflective practice can be extended to client organizations, designing interventions to help individuals and companies to engage in reflective activities that lead to action and continuous learning. The qualification framework is presented to boost broader debate on independent HRD consultants' knowledge and skills. It provided a holistic perspective for assessing and certifying the development of independent HRD consultants' knowledge and skills. In terms of the consulting process followed, independent consultants reported that entry and contracting was a very important phase because it was the moment when consultants had the opportunity to delimit the boundaries of the project, based on realistic expectations from both parties. Among the tools that independent consultants used to assess organizations were the balance scorecard, benchmarking, Porter's five forces, SWOT analysis, and core

competencies analysis. The most used HRD interventions that independent consultants implemented were T&D, coaching, 360-degree feedback, job design and job descriptions, team building, process improvement, Total Quality Management, benchmarking, strategic planning, and balanced scorecard. Finally, findings provided two perspectives on HRD in Colombia. Gathering perspectives from ten independent HRD consultants did not represent an entire population or a final contextualization of HRD practices in Colombia. However, these perspectives helped delimit consultants' practices, and suggested a continued revision of the HRD field in other contexts outside the United States.

DEDICATION

"I have competed well; I have finished the race; I have kept the faith"

— 2 Timothy 4:7

To my dear family in Colombia and my beloved husband Gary, thank you all for your unconditional love and support throughout this academic journey! I love you dearly.

ACKNOWLEDGEMENTS

NOMENCLATURE

HRD   Human Resource Development

HRM   Human Resource Management

T&D   Training & Development

CD   Career Development

OD   Organizational Development

CONTRIBUTORS AND FUNDING SOURCES

TABLE OF CONTENTS

LIST OF FIGURES

LIST OF TABLES

CHAPTER I

INTRODUCTION

In this chapter, I provide an introduction to the topic of my research. I begin with the background of the study followed by the statement of the problem, purpose and research questions, and an overview of the frame of reference informing my research. I conclude with the significance of the study, the boundaries and terms used in my dissertation, and my role as the researcher.

Background of the Study

The overarching purpose of this exploratory research was to identify learning experiences of independent human resource development (HRD) consultants that have helped them improve their practice and develop expertise in Colombia. In addition, my aim was to provide a framework about the (a) consulting business, process, and services, (b) profile of independent consultants, and (c) knowledge, skills, and attitudes required to be an effective consultant in Colombia. The term independent consultant is defined in this study as an individual who is a contractor, freelancer, self-employed, or small business owner, and who is considered as a non-employee providing a service or performing a work for a company for an agreed price.

Furthermore, identifying the national context in which HRD operates is crucial. McLean and McLean (2001) suggested that this field varies from one country to another, and the national differences are a crucial factor in determining the way in which HRD

professionals work. Thus, HRD interventions need to be contextualized, meaning it is based on each country and its particular characteristics.

Colombia has the fourth largest economy in South America and the third largest population, after Brazil and Mexico (DANE, 2015). It has significant natural resources, and substantial oil reserves. Its ethnic mix includes African descendants brought in as slaves, Spanish colonists, original native inhabitants, and immigrants from Europe, and the Middle East. Colombia has been impacted by decades-long violent conflicts involving outlawed armed groups, drug cartels, and violations of human rights. Nevertheless, since 2002, Colombia has made significant progress towards improving national security (BBC, 2015). Although a major player in South America, Colombia has received minimal research attention from HRD scholars (see Cajiao-Wingenbach & Wang, 2016). This may prohibit HRD professionals from developing country-specific HRD programs and interventions.

Besides its specific characteristics, it is important to mention that HRD practices and/or interventions in Colombia are identified under the umbrella of Human Resource Management (HRM). Main practices can be classified into two general groups: (a) functional or traditional practices (i.e., selection and retention, training and development, performance appraisals, compensation, and employee welfare), and (b) emergent practices (i.e., organizational climate and culture appraisals, organizational communications, organizational development, social responsibility, and outplacement) (Calderon, Naranjo & Alvarez, 2007; 2010; Orrego, 2015; Saldarriaga, 2008).

Moreover, an issue that has impacted Colombia and its workforce is the practice of informal employment due to public sector corruption and low regulation from the government (Williams & Youssef, 2014). Informal employment encompasses persons in employment who, by law or in practice, are not subject to national labor legislation or entitled to social protection and employment benefits (ILO, 2013). This points to the need for standardizing the employment system to reduce inequality and social exclusion. Doing so will enable organizations to adopt measures that will allow for formal employment, wage labor, and social protection coverage (ILO, 2014). From 2008 to 2015, informality in Colombia was reduced from 67.4% to 62% (Consejo Privado de Competitividad, 2016) thanks to the implementation of the Decree 1607 in 2012, reducing the non-salary labor costs.

In Colombia, consulting has been recognized as a professional service offered to help managers analyze and solve problems faced by their organizations, and to learn from other organizational experiences (Gomez & Munera, 1998). According to Schnarch and Van Hoof (2011), Colombia's consultancy industry has more than 20 well-developed professional firms, such as Deloitte Consulting, Price Water House Consulting, KPMG Advisory, McKinsey, Ernst and Young Consulting, Accenture, Booz Allen, and Remolina and Estrada, among others. By 2008, 95% of the 1500 registered consulting firms were micro (had less than 10 employees) and near 70% of the consultants in the country were independent (Misión PYME, 2008). According to Lopez, Sepulveda, and Arenas (2010), the demand for consultants' services in Colombia has focused on training, selection, compensation, occupational health, and competency

management. The most implemented administrative practices have been quality assurance, organizational climate assessment, strategic planning, management skills, 360-degree evaluation, compensation systems, and organizations' social responsibility (Lopez et al, 2010).

Despite the increasing number of independent consultants in Colombia, there is a lack of knowledge about the learning experiences that have helped these consultants improve their practice and develop expertise. Additionally, while they make an important contribution to organizations, little we know about the consulting business, processes, and services or the knowledge, skills, and attitudes required to be an effective independent consultant in Colombia.

Statement of the Problem

Though the arrival of international consulting firms to Colombia has strengthened the practice and enforced new professional standards for consulting (Schnarch & Van Hoof, 2011), according to the Departamento Administrativo Nacional de Estadística (DANE, 2016), informal employment in the workplace and high rates of unemployment led people to become independent consultants in Colombia. The governmental organization, Servicio Nacional de Aprendizaje (SENA, 2015) proposed that in lesser-developed countries such as Colombia, services offered by consultants have been considered as one of the contributing variables to the country's social and economic development. However, following a literature review of HRD and consulting in Colombia, it was possible to identify gaps in the knowledge base.

First, although reflective practice noted in the literature as essential attribute for professional development (Schön, 1983), no literature could be found wherein Colombia focused on reflective practice as a method to facilitate reflective learning in the consulting field. Second, with the increasing number of independent consultants in Colombia, there exists a need to expand current literature to provide a framework for understanding the (a) consulting business, process, and services, (b) profile of independent HRD consultants, and (c) knowledge, skills, and attitudes required to be an effective independent consultant in Colombia. Finally, since there is no clear distinction between HRD and HRM practices in this country, it is important to expand current knowledge in terms of HRD consulting practices in this context.

Purpose of the Study and Research Questions

The overarching purpose of this exploratory research was to identify learning experiences of independent HRD consultants that helped them improve their practice and develop expertise in Colombia. In addition, my aim was to provide a framework about the (a) consulting business, process, and services, (b) profile of independent consultants, and (c) knowledge, skills, and attitudes required to be an effective consultant in Colombia.

The research questions that guided this study were:

1. What are the learning experiences that helped independent HRD consultants improve their practice and develop expertise in Colombia?

2. What knowledge, skills, and attitudes are required to be an effective independent HRD consultant?

3. What is the profile of independent HRD consultants, and features of the consulting business?

Frame of Reference

In this section, the theoretical and conceptual frameworks of the study are briefly described and are further discussed in Chapter II.

Theoretical Framework

Learning theory is considered the theoretical supporting pillar of the study. This theory provided the underlying structure for selection of data collection methods, and frame of reference for data analysis. Specifically, experiential learning model facilitated the exploration of learning experiences that helped independent HRD consultants improve their practice. From a constructivist perspective, learning is considered as the "process of constructing meaning and how people make sense of their experience" (Merriam, Caffarella, & Baumgartner, 2007, p. 291). People reflect on concrete experiences, and as a result of these reflections, they construct new knowledge. Theorists under this perspective (see Dewey, 1938; Fenwick, 2003) believed that all knowledge is context-based and cannot be separated from the context in which it is used.

Kolb's (1984) and Jarvis' (1987) models are the most recognized approaches to experiential learning within the constructivist paradigm (Merriam et al., 2007). Based on Lewin's problem-solving model of action research, Kolb's (1984) experiential learning model is also widely used in organizational development (Cummings & Worley, 2001). Kolb (1984) proposed that experiential learning is "the process whereby knowledge is created through transformation of experience" (p. 38).

Considering that the overarching purpose of this exploratory research was to identify learning experiences of independent HRD consultants that helped them improve their practice and develop expertise in Colombia, a reflective practice approach was adopted guiding the selection and design of data collection methods. In the professional practice arena, reflective practice is defined as a "deliberated pause to assume an open perspective, to allow for higher level thinking processes. Practitioners use these processes for examining beliefs, goals, and practices, to gain new or deeper understanding that lead to actions that improve learning" (York-Barr, Sommers, Ghere, & Montie, 2001, p. 6). The foundation of reflective practice is known as practice knowledge. As Merriam et al. (2007) proposed, "the knowledge we gain through experience and the way we practice our craft are just as important" (p. 172). York-Barr et al. (2001) suggested that "beliefs are formed from experiences and influence behavior, while goals include desired aims, outcomes, or intentions. Practices include one's dispositions, behaviors, and skills in specific areas of performance" (pp. 7-8). It is expected that individuals gain deeper insights that lead to action, as a result of reflective practice.

Conceptual Framework

Expertise is one of the bodies of literature included in the conceptual framework of the study. Defined by Swanson (2007) as "the optimal level at which a person is able to perform within a specialized realm of activity" (p. 125), expertise arose as a concept integrating the performance and learning components of HRD (Swanson & Holton, 1999). Based on Kuchinke's (1997) and Slatter's (1990) reviews of various theories of

expertise, the following are highlighted as the commonly shared principles of expertise:

(a) it is dynamic; (b) domain specific; and (c) the components of expertise are

knowledge and associate skills, experience, and problem-solving heuristics. The

following components are considered by Swanson and Holton (2009) as "the elements

that make the difference between experts and non-experts" and "the fundamental

components of human expertise" (p. 262): knowledge and associated skills, experience,

and problem-solving heuristics. Nevertheless, the difference between non-experts and

experts is not about having knowledge, but instead in "how much [knowledge] they

have, how well integrated it is, and how effectively it is geared to performance"

(Bereiter & Scardamalia, 1993, p. 74).

The third body of literature of the conceptual framework is consulting principles

and theory. Consulting has been described as a professional service that helps managers

analyze and solve practical problems and transfer successful management practices from

one organization to another (Kubr, 2002). This independent and advisory service is

characterized by the detachment of the consultant (i.e., administratively and legally

independent from the client organization), and by the professional knowledge and skills

provided relevant to practical management problems. To delimit and characterize this

field of practice and better understand the overall process, this section is organized in

four areas: (a) consulting defined, (b) HRD consulting, (c) roles of HRD consultants, and

(d) consulting process and related skills. Consulting principles provided the conceptual

support to explore and analyze: (a) the consulting business: services and portfolio,

process, practices, and type of client organizations; (b) the profile of independent consultants.

Method

A basic interpretive qualitative approach was adopted using semi-structured interviews and written self-reports to facilitate participants' reflective practice. The sample for my study was selected using convenience and purposeful sampling techniques (i.e., criterion and snowball sampling). The primary method used for data collection was interviewing. These were conducted with a fairly open structure to allow for focused and conversational two-way exchange between study participants and me. Specifically, I developed an interview protocol with semi-structured, open-ended questions. Moreover, to gain a better and deeper understanding of independent HRD consultants' experiences, research participants wrote journals or self-reports about their experiences. Data was transcribed verbatim and entered into SQR NVivo software for coding and analysis. Through this software, I analyzed interviews transcripts, collected and imported, organized and classified data by themes, and added interpretations and notes. Findings are presented in Chapter IV, including statements in relation to the research questions, verbatim examples, categories and descriptions of the experiences. Discussion of findings, recommendations for future research, and a discussion of implications are presented in Chapter V.

Significance of the Study

This study contributes to the emerging literature, practice, and research in three ways. First, the reflective practice approach facilitated the exploration of learning experiences of independent HRD consultants, creating a safe space for participants to reflect upon their professional experiences. As a result of this reflective process, it was expected that independent HRD consultants increased their awareness about how past experiences have helped them improve their practice and develop expertise. Second, findings from this exploratory study contribute to the emerging literature and the characterization of consulting practices in Colombia, by providing a framework about the (a) consulting business, process, and services, (b) profile of independent consultants, and (c) knowledge, skills, and attitudes required to be an effective consultant. Finally, following McLean and McLean's (2001) idea that HRD needs to be contextual (i.e., based on each country and its particular characteristics), it is expected that findings of this exploratory study can provide clarifications about what human resource development means in Colombia, from independent consultants' perspective.

Definition of Terms

Following are the key terms used in this study.

Human Resource Development (HRD)

The HRD field has been defined around the individual, team, organization, and the work process contexts (McLean, 2004). According to Swanson (1995) "HRD is the process of developing and/or unleashing human expertise through organization

development (OD) and personnel training and development (T&D) for the purpose of improving performance" (p. 4).

Human Resource Management (HRM)

Boxall, Purcell, and Wright (2009) defined HRM "as the integrated use of procedures, policies, and practices to recruit, maintain, and develop employees in order for the organization to meet its desired goals" (p. 1). Within this process, it is possible to identify areas such as recruitment and selection, training and development, communications, and compensations, among others.

Reflective Practice

In the professional practice arena, reflective practice is defined as a "deliberated pause to assume an open perspective, to allow for higher level thinking processes. Practitioners use these processes for examining beliefs, goals, and practices, to gain new or deeper understanding that lead to actions that improve learning" (York-Barr, et al., 2001, p. 6). It is expected that individuals gain deeper insights that lead to action, as a result of reflective practice.

Expertise

Swanson (2007) defined expertise as "the optimal level at which a person is able to perform within a specialized realm of activity" (p. 125). The commonly shared principles of expertise are: (a) it is dynamic; (b) domain specific; and (c) the components of expertise are knowledge and associate skills, experience, and problem-solving heuristics.

Consulting

Consulting has been described as a professional service that helps managers analyze and solve practical problems and transfer successful management practices from one organization to another (Kubr, 2002). This independent and advisory service is characterized by detachment of and professional knowledge and skills provided relevant to practical management problems. In Colombia, consulting has been recognized as a professional service offered to help managers analyze and solve problems faced by their organizations, and to learn from other organizational experiences (Gomez & Munera, 1998). The term independent consultant is defined in this study as an individual who is a contractor, freelancer, self-employed, or small business owner, and considered as a non-employee providing a service or performing a work for a company for an agreed price.

<div align="center">

Boundary of the Study

</div>

The limitations, delimitations, and assumptions of this research are presented as follows.

Limitations

One of the limitations of this study was the accessibility to participants because the researcher lives in United States and participants were located in Colombia. In addition, another limitation was the applicability of the study to practice in other countries considering their contextual variables such as political, economic, education, culture, and workforce characteristics that may affect the type of HRD consulting interventions. Furthermore, accessibility to technology was considered as a limitation because the data collection process was conducted using GoToMeeting. Therefore, it

required reliable and high-speed internet connection from my and participants' locations. Finally, the procedures used were inductive and based on my own experience in collecting and analyzing data. Thus, self-reported data can be a limitation due to the fact that it rarely can be independently verified.

Delimitations

A part of the delimitations of this study are the characteristics of the participants. Following were the criteria for selection of participants in the study.

1. Independent HRD consultants: contractors, freelancers, self-employed, or small business owners, considered as a non-employee who provides a service or performs work for a company for an agreed price.

2. Main focus of their services should be on training and development (T&D), career development (CD), and organizational development (OD) as these are the core components of the HRD field.

3. Must be working as a full time independent consultant.

4. Men and/or women living in urban areas such as Bogota, Medellin, and/or Cali. These are considered the largest cities of Colombia, where the majority of businesses and industrial organizations are located. Therefore, it was expected that research participants were working in these cities because there is more access to getting clients for their consulting business.

5. Age and years of experience. In this study, it was expected that independent HRD consultants had developed a certain level of expertise, and it is assumed that they had multiple years of experience in the field. Research suggested (see

Bereiter & Scardamalia, 1993; Swanson & Holton, 2009) that to be considered an expert, a person "must have the equivalent of ten years of combined studies and related work experience" (Swanson & Holton, 2009, p. 263). For the purpose of my study, independent consultants were at least 40 years old, had a bachelors' degree (i.e., five years to complete an undergraduate degree in Colombia), and had a minimum of three years of consulting experience.

Assumptions

Assumptions of this study were: (a) my position as an independent HRD consultant in Colombia aided me in connecting especially well with participants in the study, (b) participants provided honest and truthful responses, (c) technology (i.e., software such as GoToMeeting, and high-speed internet), facilitated the data collection process, and (d) findings contributed to HRD literature, research, and practice.

The Researcher's Role

Creswell (2013) suggested that researchers always bring certain beliefs and assumptions to their studies such as personal history, views of others, among other issues. Considering that complete objectivity is impossible in qualitative research (Patton, 2002), "the researcher's personal experiences and insights are an important part of the inquiry and critical to understanding the phenomenon" (p. 40). However, pure subjectivity undermines credibility (Patton, 2002). Thus, is important for qualitative researchers to assume a neutral nonjudgmental stance toward the process and whatever content that may emerge.

As a researcher, I recognize my background shapes my interpretation based on my personal, cultural, and professional experiences. However, my intent was to make sense (or interpret) the meanings that others had about the phenomenon under study. According to Malterud (2001), "a researcher's background and position will affect what they choose to investigate, the angle of the investigation, the most adequate methods, the findings considered most appropriate, and the framing and conclusions of the study" (p. 483). Therefore, it is important for the researcher to be committed to reflexivity to gain objectiveness throughout the research process and assess and share the effects of this process as part of the discussion and limitations.

Mann and Kelley (1997) suggested that reflexivity "is grounded in both the social location and the social biography of the observer and the observed" (p. 392). Moreover, it refers to the awareness that all knowledge is affected by the social conditions under which it is produced. Thus, I considered it important to identify the preconceptions I brought into my study representing previous personal and professional experiences as an independent consultant. Additionally, it was important to reflect about my beliefs, motivation, and perspectives about what was to be investigated. Nonetheless, preconceptions are not the same as bias. If reflexivity is thoroughly maintained, "personal issues can be valuable and relevant sources for the research study" (Malterud, 2001, p. 484).

At this point, I consider it important to discuss the perspective of being an insider or outsider in my study. Whether a researcher is an insider or an outsider is an epistemological matter because the researcher's position in relation to his/her

participants has a direct impact on the knowledge that is co-created between them (Griffiths, 1998). Determined by where I stand in relation to my research participants and the phenomenon under study, there was an assumption related to the concept of insider/outsider that I made. Since the goal of qualitative research is to describe and understand experiences from an insider perspective, I believed that my previous experiences as an independent consultant aided me in connecting especially well with the participants. Further, I believe that as an insider, I was able to engage research participants more easily and use their shared experiences to gather a richer set of data.

The researcher's background

I am a 40-year-old woman from Colombia. I finished my primary, secondary, and post-secondary education in my home country. I graduated from a private university in Cali Colombia, with an undergraduate degree in organizational psychology and a master's degree in management of educational services. I came to the United States five years ago as a student to pursue my doctoral degree in Human Resource Development. I had the opportunity to join Texas A&M University's College of Education as a Graduate Research Assistant when I arrived almost five years ago. Currently, I am the Lead Coordinator of two federally-funded grants in the Center for Research in Dual Language and Literacy Acquisition (CRDLLA). This experience has had a significant impact on my life, not only because of professional goals, but for what it means to me in terms of cultural exchange, improved language skills, and opportunities to work and learn with others from a different country that have made this experience much more enlightening and educational. While study and research within the HRD field is my primary objective,

my interests in travel, music, nature, and outdoor activities help me maintain a sense of perspective in life. People close to me describe me as a woman full of energy and passion, enthusiastic, outgoing, and pleasant in my endeavors and social interactions. I value and live by characteristics such as honesty, justice, equity and responsibility.

When reflecting about my past experiences, my first thought is of a person who influenced my decision of being a consultant and a teacher, my dad. My father, has been my role model of excellence, hard work, and honesty. He was for the greater part of his life, an officer in the Navy of Colombia. Currently, he is the director of the environmental economy and sustainable development graduate program. He has been also an independent consultant for more than 30 years. His ability to teach and to interact with his students inspired me to choose my role as a university professor, aware that in order to continue contributing to the transformation of my country, I could accomplish that through companies, and also through educational institutions. It is his belief that through education, long-term structural changes are designed and have an effect on policies, social changes, and the creation of more equitable societies.

Before I became an independent consultant, I had the opportunity to work at organizations from the textile and service sectors in positions such as quality system leader, social welfare analyst, selection leader, and national director of human resource management. While working within these organizations, I noticed that it was hard to accomplish everything I wanted to do for employees. Some of the barriers I found were lack or limited budget for welfare activities, managers who didn't want to invest in training and development interventions or pay for employee benefits. Frustrated by these

barriers and other issues, I decided to be an independent HRM consultant. It was my belief that I could influence the design and implementation of HRM policies oriented towards workers from an outsider role. Being an external consultant, rather than working directly for organizations in the HRM department, helped me communicate with managers and CEOs about their workforce needs. It was a matter of credibility and expertise, I think. It was related to how organizations perceived consultants.

As General Director of my own company called "Gestión Consultores", I provided services such as employee selection, T&D, and had the opportunity to be a facilitator of organizational change. From some of the individual and group psychological phenomena observed in these organizations, such as personality, motivation, learning, satisfaction, and welfare, I designed and implemented a series of training programs for more than 200 professionals among psychologists, industrial engineers, administrators, and lawyers. Some of the training interventions were focused on strategic human resource management, analysis and job descriptions based on the competencies model, emotional intelligence in the workplace, job placement, development of skills in business relationship, and customer service. Those programs allowed me to favor the teaching - learning process as a teacher, and improve competencies such as leadership, teamwork, effective communication, initiative, adaptability, self-control, relationship building, analytical thinking, and interpersonal understanding.

At the same time that I was working as an independent consultant, I started teaching Organizational Psychology in 2007. During the year and a half that I worked at

"Universidad Cooperativa", I gained experience as an academic advisor and became coordinator of the organizational and social psychology field. As a teacher, I obtained an overall rating of 4.8 of 5.0 from my students. My greatest motivation for obtaining that rating was precisely them, who with great effort fought against a system that limits their quality job opportunities if they don't have a professional degree. Finally, due to my performance at Universidad Cooperativa, the Director of Research at "Universidad de San Buenaventura" invited me to be part of the Faculty of Psychology in 2008. I worked as an academic advisor and professor of Organizational Psychology, Group Intervention, and Organizational Internship courses until I moved to the United States. I facilitated students' learning through different practical and real scenarios (from my consulting clients), which allowed them to develop skills to diagnose, understand how organizations work, and group dynamics. They also were able to identify, design and apply interventions, relevant to the characteristics of each organization, the human factor, and its work environment.

Organization of the Study

Chapter I encompasses the background of the study, the statement of the problem, and the significance and purpose of my research. In addition, it includes a summary of the frame of reference of the study, research questions, definitions, limitations, delimitations, and assumptions. In Chapter II, the theoretical and conceptual frameworks guiding the overall research design are discussed. Furthermore, the research framework and methods are presented in Chapter III. Chapter IV encompasses a

summary of key research findings. And finally, in Chapter V, I present the discussion of

the findings, implications for practice and research, recommendations, and conclusions.

CHAPTER II

LITERATURE REVIEW

In this chapter, I present the frame of reference of my study (Figure 1). First, I start by restating the purpose and research questions followed by a brief description of the HRD field, since the study is framed within the boundaries of this discipline. Second, the theoretical framework that guided the overall research design is discussed. Third, expertise and consulting are presented as the conceptual framework of the study. Finally, I conclude this chapter with the description of the Colombian context, the empirical literature found in terms of HRD practices, and the independent consulting field in Colombia.
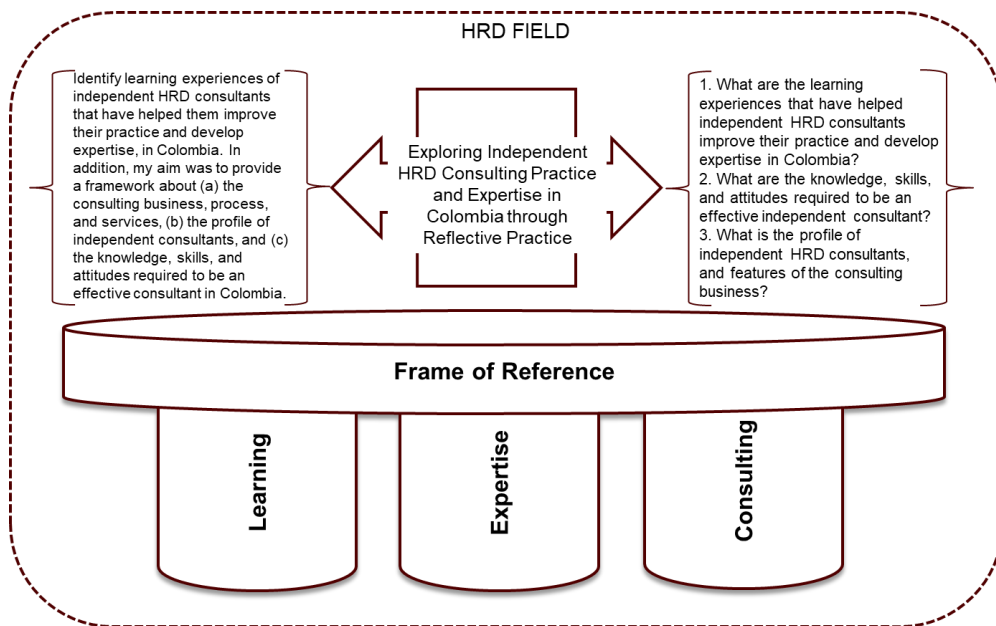
Figure 1. Frame of reference.

The theoretical and conceptual literature is organized around three bodies of literature: (a) learning theory, (b) expertise, and (c) consulting. Each of these supporting pillars are discussed in detail in the following sections.

Purpose and Research Questions

The overarching purpose of this exploratory study was to identify learning experiences of independent HRD consultants that helped them improve their practice and develop expertise in Colombia. In addition, my aim was to provide a framework about the (a) consulting business, process, and services, (b) profile of independent consultants, and (c) knowledge, skills, and attitudes required to be an effective consultant in Colombia.

The research questions that guided this study were:

1. What are the learning experiences that helped independent HRD consultants improve their practice and develop expertise in Colombia?

2. What are the knowledge, skills, and attitudes required to be an effective independent consultant?

3. What is the profile of independent HRD consultants, and features of the consulting business?

Human Resource Development (HRD) Field

This study is framed within the boundaries of the HRD field. Therefore, it is important to delimit and characterize the discipline to better understand its purpose, paradigms, and core components. HRD is an evolving field of theory and practice with

22

the aim of facilitating growth of individuals, development of organizations, and advancement of the community (McGuire & Jorgensen, 2011). Although many scholars have contributed to the conceptualization of the discipline, there is no agreement over a specific definition (McLean & McLean, 2001). Before presenting different perspectives to approach HRD, it is important to recognize that HRD is a multi-disciplinary field with its roots on different disciplines such as business, psychology, education, and sociology, among others. Swanson and Holton (2009) introduced the three-legged stool model which gives stability to the field. Supported and explained through psychology theories (e.g., Gestalt, behavioral, and cognitive), economic theories (e.g., scarce resources, sustainable, and human capital), and system theories (e.g., general systems, futures, and chaos), this model make-up the foundational contributing theory underlying the HRD field (Swanson & Holton, 2009).

Furthermore, scholars have added to the definition of HRD, while others refused to define it such as Lee (2001) and Kuchinke (2001). From a critical perspective, Fenwick (2004), and Bierema and Callahan (2014), discussed power issues within organizations and give voice to the repressed. From a business and performance perspective, Swanson (1995) suggested that one of the main foci of HRD interventions should be performance to improve businesses. Moreover, from an international and societal perspective, McLean and McLean (2001) proposed that the definition of HRD needs to be contextual, meaning it is based on each country and its particular characteristics. They also suggested that HRD should focus its efforts on the implementation of interventions towards the betterment of the community. Nonetheless,

23

considering the aim of this field is to facilitate growth of individuals, development of organizations, and advancement of the community, from my perspective, HRD is the discipline that brings out potential and improves performance through learning interventions at the individual, team, work process, and organizational levels.

HRD Paradigms

Learning and performance emerged as the clearest paradigms that dominate most HRD thinking and practice (Swanson & Holton, 2009). Within the learning paradigm, it is possible to identify three streams (i.e., individual, performance-based, and whole systems learning). First, the individual learning stream is focused on individual learning as an outcome and the individual learner as the target of HRD interventions. Moreover, adult learning and instructional design are considered the approaches for individual learning. Second, performance-based learning is focused on individual performance resulting from learning. Primary intervention continues to be learning, but interventions are also focused on building organizational systems to support individual learning. Third, whole systems learning focuses on enhancing multiple levels of performance through learning. This is accomplished by "building systems that enhance learning at the individual, team, and organizational levels" (Swanson & Holton, 2009, p. 141). On the other hand, individual and whole systems performance improvement are the main streams of the performance paradigm. Through learning and non-learning interventions at multiple levels, the aim within this perspective is to enhance both individual and systems performance in the organization.

Swanson and Holton (2009) suggested that a "substantial overlap exists between the HRD paradigms" (p. 158). For instance, there is a strong belief in learning and development as ways for individual growth. Likewise, through human expertise, organizations can be improved. And, both paradigms are committed to people and human potential. Further research and debate is needed to articulate the similarities, as well as the differences, more clearly among learning and performance paradigms (Swanson & Holton, 2009).

HRD Core Domains

Three domains are identified as the core components of the HRD field: training and development (T&D), career development (CD), and organizational development (OD). These components exist in support to each other to facilitate learning and unleash performance.

1. Training and development. Considered as the largest realm of HRD activity (Swanson & Holton, 2009), T&D is the process of systematically developing work-related knowledge and expertise. According to Aguinis and Kraiger (2009), training is a systematic approach to affecting individuals' knowledge, skills, and attitudes to improve individual, team, and organizational effectiveness. Its ultimate goal is the transferability of knowledge to develop competencies and expertise. T&D have been characterized as a five-phase process. The ADDIE model (i.e., analyze, design, develop, implement, and evaluate) is recognized as the "most widely used methodology for developing systematic training" (Swanson & Holton, 2009, p. 233).

25

2. Career Development. According to Egan, Upton and Lynham (2006), CD is a lifelong process with the goal of managing learning, work, and transitions to move towards a determined future. Five theories have influenced career development research and practice. They are Super's (1980) self-concept development theory, Holland's (1997) personality and vocational choice theory, Dawis' (1996) theory of work adjustment, Lent, Brown, and Hackett's (2002) social cognitive theory, and Savickas' (2002) career construction theory. Career development interventions involve any activities that empower people to cope effectively with career development tasks (Spokane, 1991). For instance, activities that help people develop occupational self-awareness or learn decision-making skills, can be considered as career development interventions (Niles & Harris-Bowlsbey, 2013).

3. Organizational Development. Although there is no standard definition of OD (McLean, 2005), this domain has been defined as a system-wide application of behavioral science knowledge to the planned development, improvement, and reinforcement of strategies, structures, and processes that lead to organization effectiveness (Cummings & Worley, 2001). The main goal of OD professionals is to implement a wide range of methods and processes to "bring about desired outcomes in organizations" (McLean, 2005, p. 4). Both, action research (see Lewin, 1940) and appreciative inquiry (see Cooperrider & Srivastva, 1987) models have been considered the primary models for conducting OD (McLean, 2005). Some of the organizational situations for implementing OD are to: (a)

develop or enhance the organization's mission and vision statements, (b) align

functional structures to work for a common purpose, (c) create a strategic plan,

(d) manage conflict, (e) make planned improvements, (f) create a collaborative

environment, and (g) create reward systems (McLean, 2005).

HRD and Human Resource Management (HRM)

In Colombia, HRD practices and/or interventions can be identified under the

umbrella of Human Resource Management (HRM). For the purpose of my research,

differences and areas of overlap between HRD and HRM are discussed at this point.

Different scholars have attempted to distinguish HRD and HRM, as well as to point out

areas of overlap (see Chalofsky, 2007; Ruona & Gibson, 2004; Swanson & Holton,

2009). According to Swanson and Holton (2009), "the most apparent connection is with

the use of the term human resources (HR)" (p. 12). HR has been conceived as having

two major components – HRD and HRM. However, HR is confused with HRM goals

and activities such as hiring, compensation, and compliance issues (Swanson & Holton,

2009).

Both, HRM and HRD have been heavily influenced by psychological theories

(e.g., industrial/organizational (I/O) psychology, as well as psychologists writing on

topics such as T&D, CD, and OD (Werner, 2014). However, HRM is understood as the

"process of managing human talents to achieve organization's objective" (Haslinda,

2009, p. 180). It includes processes such as recruitment and selection, compensation and

benefits, labor and industrial relations, and also the management of employees' safety

and health in organizations. According to McLean (2005), some of the overlapping areas

between the HRD and HRM fields are organization and job design, human resource

planning, performance management systems, and selection and staffing.

Theoretical Framework

Learning Theory

Learning theory is considered as a primary theoretical supporting pillar of the

study (Figure 2) and is discussed from the constructivist lens. To facilitate the

exploration of learning experiences that helped independent HRD consultants improve

their practice and develop expertise, experiential learning and the reflective practice

approach are discussed as well. I conclude this section with the rationale for the selection

of learning theory as the theoretical supporting framework of the study.
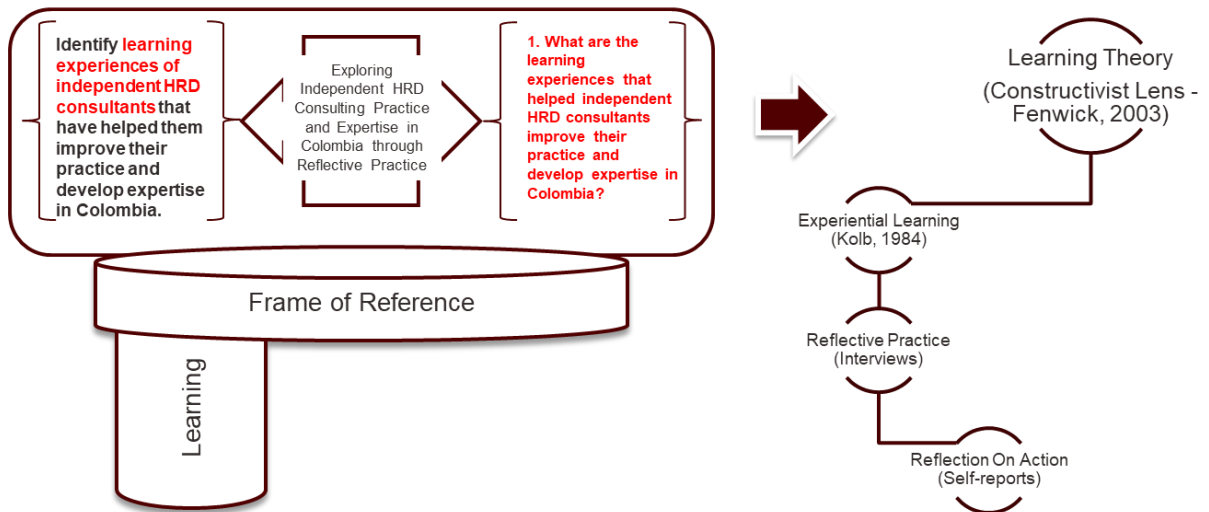
Figure 2. Learning theory comprises the primary conceptual pillar of the theoretical

framework.

From a constructivist perspective, learning is considered as the "process of constructing meaning and how people make sense of their experience" (Merriam, Caffarella, & Baumgartner, 2007, p. 291). People reflect on concrete experiences and as a result of these reflections, they construct new knowledge. Theorists under this perspective (see Dewey, 1938; Fenwick, 2003) believe that, all knowledge is context-based and cannot be separated from the context in which it is used.

Moreover, Merriam et al. (2007) suggested that experience is "integral to learning" (p. 144). Therefore, since the focus of the constructivist approach is on learners' meaning-making process as the result of an experience (Fenwick, 2003), it is important to understand that people learn from it in different ways (i.e., direct embodied experience, vicarious experiences, simulated experiences, collaborative experiences, and introspective experiences such as meditation). Furthermore, Baumgartner (2003) suggested that "learning is achieved through assimilation and accommodation" (p. 3). Assimilation is the process of adding information to an existent cognitive structure (i.e., applying something people know to a new event), and accommodation refers to the process of reorganizing the existing cognitive structure after adding the information (Miller, 1993).

Although contributions of constructivism to HRD "are still emerging" (Swanson & Holton, 2009, p. 202), this perspective facilitates the exploration of learning experiences that helped independent HRD consultants improve their practice and develop expertise, and the discussion and reflection of participants' experiences through interviews and self-reports.

Experiential learning

Kolb's (1984) and Jarvis' (1987) models are the most recognized approaches to experiential learning within the constructivist paradigm (Merriam et al., 2007). Based on Lewin's problem-solving model of action research, Kolb's (1984) experiential learning model is also widely used in organizational development (Cummings & Worley, 2001). Kolb (1984) proposed that experiential learning is "the process whereby knowledge is created through transformation of experience" (p. 38). However, for learning to happen through experience, it must exhibit two principles (Dewey, 1938). The first principle is continuity, which is the process of connecting what "learners have learned from current experiences to those in the past as well as see future implications" (Merriam et al., 2007, p. 162). The second principle is interaction. Dewey (1938) proposed that "an experience is always what it is because of a transaction taking place between an individual and what, at the time, constitutes his environment" (p. 41).

In addition, Kolb (1984) suggested that learning from experience requires four abilities associated to the four-step experiential learning model (Figure 3).

Active Experimentation
- Decision-making and problem-solving skills

Concrete Experience
- Openness and willingness to involve in a new experience.

Abstract Conceptualization
- Analytical abilities.

Reflective Observation
- Observational and reflective skills.
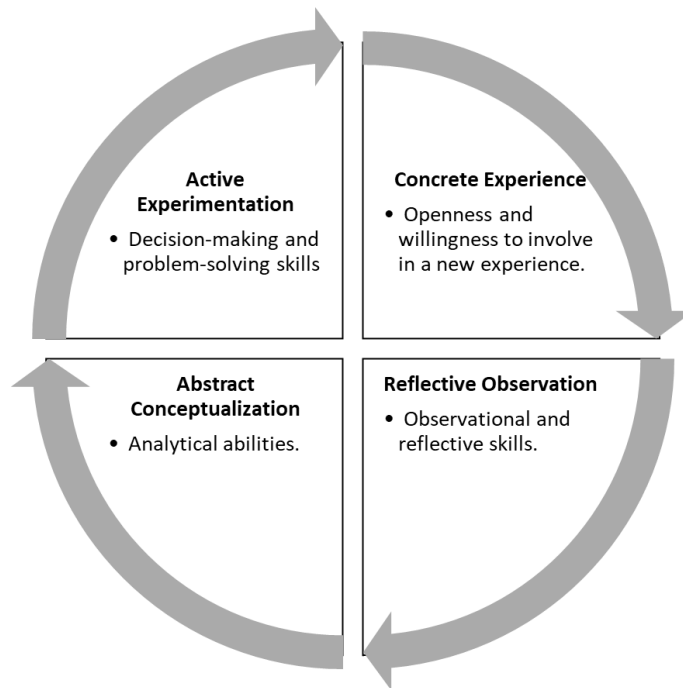
Figure 3. Kolb's (1984) experiential learning model. Adapted from "Experiential learning: Experience as the source of learning and development," by D. A. Kolb, 1984.

The first step in the experiential learning cycle proposed by Kolb (1984), is concrete experiences. This step requires openness and willingness to involve in here-and-now experiences. Second, observational and reflective skills are needed to reflect on experiences from different perspectives. The third step in the learning cycle requires analytical abilities to create concepts that integrates peoples' observations into logical models. Finally, the last step of the process is active experimentation where decision-making and problem-solving skills are needed so new concepts are used in actual practice.

Reflective practice

So far, I've discussed how learning is viewed from a constructivist perspective, the important interaction between experience and learning, and Kolb's experiential learning model and its associated skills. Considering that the overarching purpose of this exploratory research was to identify learning experiences of independent HRD consultants that have helped them improve their practice and develop expertise in Colombia, reflective practice is introduced at this point as an integrated approach to this qualitative study.

Criticos (1993) stated that "effective learning does not follow from positive experience but from effective reflection" (p. 162). People may engage in (a) nonreflective learning (i.e., remembering an experience and repeating it or just doing what are told to do), or (b) reflective learning (i.e., plan, monitor, and reflect upon our experiences). This last one is conceived by Jarvis (2001) as one of the highest forms of learning. In the professional practice arena, reflective practice is defined as a "deliberated pause to assume an open perspective, to allow for higher level thinking processes. Practitioners use these processes for examining beliefs, goals, and practices, to gain new or deeper understanding that lead to actions that improve learning" (York-Barr et al., 2001, p. 6). The foundation of reflective practice is known as practice knowledge. As Merriam et al. (2007) proposed, "the knowledge we gain through experience and the way we practice our craft are just as important" (p. 172). The type of data that is used in the reflective process includes past and current experiences, and tacit

knowledge about practice which is "the knowledge that we use every day without thinking about it" (Merriam et al., 2007, p. 172).

York-Barr et al. (2001) highlighted the following elements of reflective practice: (a) deliberate slowing down to consider multiple perspectives, (b) preserving open perspective, (c) active and critical thinking, and (d) examination of beliefs, goals, and practices. These authors also suggested that "beliefs are formed from experiences and influence behavior, while goals include desired aims, outcomes, or intentions. Practices include one's dispositions, behaviors, and skills in specific areas of performance" (pp. 7-8). It is expected that individuals gain deeper insights that lead to action, as a result of reflective practice.

Finally, two basic processes have been identified as the core to reflective practice. The first is reflection-on-action which involves thinking through a situation after it has happened. This mode of reflection is presented as "an analytical exercise, which results in new perspectives on experiences, changes in behaviors, and commitments to action" (Merriam et al., 2007, p. 175). Kolb's (1984) experiential learning model is the most used in this practice because of the cyclical nature of the model, which allows for a process of continued growth. The second process is reflection-in-action. Schön (1987) is the most recognized theorist because he encouraged practitioners to incorporate this form of reflective practice as an integral part of professional development. From his perspective, reflection-in-action is triggered by surprise reshaping "what we are doing while we are doing it" (Schön, 1987, p. 26). This

practice gives practitioners the autonomy to practice their expertise, creating new ways of thinking and solving problems related to their practice.

Rationale

Based on the purpose and nature of my research, learning theory provided the underlying support for the selection of data collection methods, and the frame of reference for data analysis. Specifically, experiential learning model facilitated the exploration of learning experiences that helped independent HRD consultants improve their practice and develop expertise in Colombia. A reflective practice approach was integrated using semi-structured interviews and written self-reports to collect participants' experiences, as further discussed in the methods section of Chapter III.

Conceptual Framework

In this section, the conceptual framework of the study is presented. I discuss expertise and its components, followed by a description of the consulting field. I conclude this section with the rationale for selecting these supporting pillars for my research.

Expertise

Expertise is one of the bodies of literature included in the conceptual framework of the study (Figure 4). Defined by Swanson (2007) as "the optimal level at which a person is able to perform within a specialized realm of activity" (p. 125), expertise arose as a concept integrating the performance and learning components of HRD (Swanson & Holton, 1999). Based on Kuchinke's (1997) and Slatter's (1990) reviews of various theories of expertise, commonly shared principles of expertise include: (a) it is dynamic;

(b) domain specific; and (c) the components of expertise are knowledge and associate

skills, experience, and problem-solving heuristics.
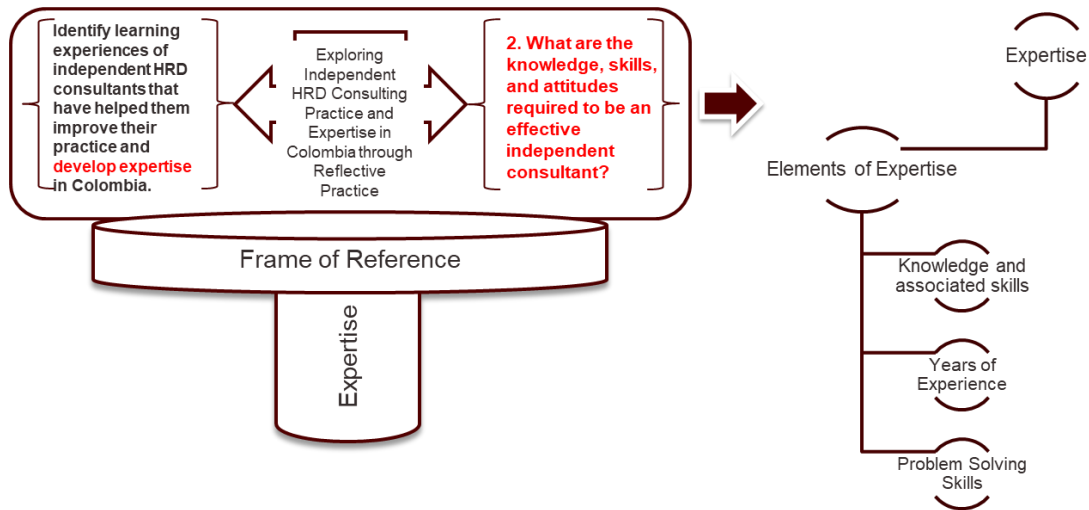
Figure 4. Expertise is a secondary conceptual pillar of the frame of reference.

Based on the aforementioned principles, Swanson and Holton (2009) proposed

that expertise is an "internal process of continuous learning by the individual

characterized by the constant acquisition of knowledge, reorganization of information,

and progressive problem-solving" (p. 261). They also recognized the importance of the

dynamic state of expertise lies in the fact that people never stop gaining expertise.

Gleespen (1996) suggested that "specialized knowledge is required for excellence in

most fields" (p. 502). Therefore, since one of the reasons consultants are hired by

organizations is to provide special knowledge or skills (Kubr, 2002), it is expected that

independent HRD consultants have developed a high level of domain-specific

knowledge and skills. To confirm this assumption, the foundational concepts or

components of expertise are introduced in the next section, allowing me to elaborate in Chapters IV and V, on the second research question proposed – what are the knowledge, skills, and attitudes required to be an effective independent consultant in Colombia.

Components of expertise

The third foundational principle of expertise is comprised of knowledge and associated skills, experience, and problem-solving heuristics. These are considered by Swanson and Holton (2009) as "the elements that make the difference between experts and non-experts" and "the fundamental components of human expertise" (p. 262). Bereiter and Scardamalia (1993) proposed that "every kind of knowledge has a part in expertise" (p. 74) and classify kinds of knowledge as (a) obvious kinds (procedural and formal knowledge), and (b) less obvious kinds (informal, impressionistic, and self-regulatory knowledge). However, Swanson and Holton (2009) highlighted that for the purpose of expertise "knowledge has to be domain-specific" and "an interactive component" of it (Swanson & Holton, 2009, p. 262). Nevertheless, the difference between non-experts and experts is not about having knowledge, but in "how much [knowledge] they have, how well integrated is, and how effectively it is geared to performance" (Bereiter & Scardamalia, 1993, p. 74).

The second component of expertise is experience. In this study, it was expected that independent HRD consultants had developed a high level of domain-specific knowledge and skills, and it was assumed they were experienced in the field. Research suggested (see Bereiter & Scardamalia, 1993; Swanson & Holton, 2009) that to be considered an expert, a person "must have the equivalent of ten years of combined

studies and related work experience" (Swanson & Holton, 2009, p. 263). For the purpose of my study, independent consultants should have had at least bachelors' degree (it takes five years to complete an undergraduate degree in Colombia), and a minimum of three years of consulting experience. I share Swanson's and Holton's (2009) view of expertise and consider it as a process of continuous learning. Therefore, my rationale for including independent consultants with 3+ years of experience is linked to the specific research goal of exploring learning experiences that have helped consultants develop expertise throughout all their years of experience working in the field.

Finally, the last component of expertise is problem-solving heuristics. It has been described as "the key to expertise" (Swanson & Holton, 2009, p. 263), and relates to the ability and/or approach to solve problems. Bereiter and Scardamalia (1993) emphasized that problem-solving is a dynamic element in the development of expertise, and perceived experts as continuous problem-solvers.

<div align="center">**Rationale**</div>

Based on the purpose and nature of my research, expertise was selected as one of the supporting bodies of literature included in the conceptual framework of the study, allowing me to elaborate on the second research question proposed (what are the knowledge, skills, and attitudes required to be an effective independent consultant in Colombia), through the aforementioned components of expertise. Self-reports were included as a data collection method because they facilitated participants' reflection-on-action, and the opportunity to elaborate on independent consultants' problem-solving skills.

<center>**The Consulting Field**</center>

The last body of literature contributing to the conceptual framework focused on consulting principles and theory (Figure 5), providing the conceptual support to explore and analyze (a) the consulting business: services and portfolio, process, practices, and type of client organizations; and, (b) the profile of independent consultants.
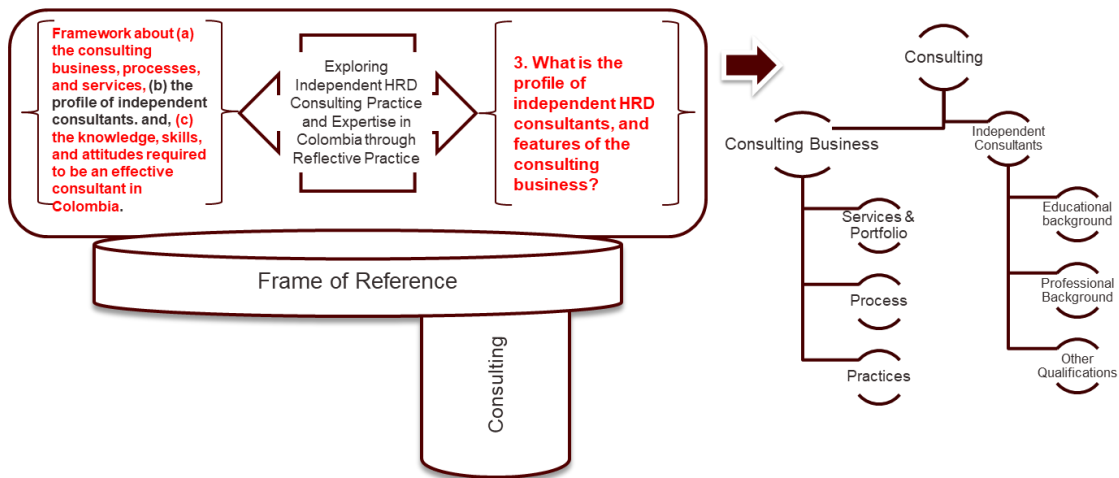
Figure 5. Consulting constitutes the final conceptual pillar of the frame of reference.

To delimit and characterize consulting as a field of practice and better understand the overall process, this section is organized around four areas: (a) consulting defined, (b) HRD consulting, (c) roles of HRD consultants, and (d) consulting process and related skills.

Consulting Defined

Consulting has been described as a professional service that helps managers analyze and solve practical problems and transfer successful management practices from

<center>38</center>

one organization to another (Kubr, 2002). This independent and advisory service is characterized by the detachment of the consultant (i.e., administratively and legally independent from the client organization), and by the professional knowledge and skills provided relevant to practical management problems. Greiner and Metzger (1983) conceived the consulting process as an

> …advisory service contracted for and provided to organizations by specially trained and qualified persons who assist, in an objective and independent manner, the client organization to identify management problems, analyze such problems, recommend solutions to these problems and help when requested in the implementation of solutions. (p. 7)

However, Saxton (1995) proposed a different term to consultancy: third party interventions. Third parties have been discussed in the literature as any individual or organization involved directly or indirectly in assisting an organization. In other words, third parties are individuals or organizations formally contracted by a company to provide information or input for strategic decisions (Robinson, 1982). These generally include psychologists, lawyers, accountants and/or bankers.

According to Kubr (2002), consultants are hired by organizations for one or more of the following reasons: 1) to provide special knowledge or skill; 2) supply intensive professional help on a temporary basis; 3) to give an impartial outside viewpoint; and/or 4) to provide management with arguments which justify pre-determined measures. Barcus and Wilkinson (1995) suggested that helping organizations improve its capabilities and resources involve activities such as: (a) counseling management in its

analysis, planning, organizing, operating, and controlling functions; (b) conducting assessments, preparing recommendations, proposing plans, and providing advice and technical assistance in their implementation; (c) reviewing and suggesting improvement of policies, procedures, systems, methods, and organization relationships; and (d) introducing new ideas, concepts, and methods to management. Furthermore, these activities involve two types of encounters (i.e., consultations and engagements) with clients. A consultation consists of providing advice and information in a short time frame. On the other hand, engagement consists of that form of management advisory or consulting service in which an analytical approach and process is applied in a project (Barcus & Wilkinson, 1995).

HRD Consulting

HRD consulting – identified in the literature as personnel or HR consulting – is categorized as one of the business consulting services among business planning, process involvement, and change management (Barcus & Wilkinson, 1995). Nevertheless, all these services fall under the umbrella of management consulting. Fulkerson (2012) defined HR consulting as the application of various tools, methodologies, and interventions to address concerns at individual, group, team, and/or organizational levels. From the HRD standpoint, McLean (2005) differentiated between OD and traditional consultants such as management consultants. For instance, traditional consultants are considered to be subject matter experts, while OD consultants are seen as facilitators. Traditional consultants "take more of a telling and directive mode with clients" (McLean, 2005, p. 18). On the other hand, OD consultants work or collaborate

with clients and client members, allow clients to own and manage process and outcomes, and transfer skills to client organizations.

OD professionals or consultants can be employed by the organization (i.e., internal consultant) or can be hired on a contractual basis (i.e., external consultant). These types of consultants offer advantages for both the consulting process and the organization. For example, an internal consultant is familiar with the organization and how it works. External consultants have a "pre-knowledge of the organizational culture and does not enter the consulting process with any preconceived notions" (McLean, 2005, p. 15). Likewise, internal consultants have relationships established, and therefore can get cooperation and involvement more quickly. While organizations make less long-term commitment for pay and benefits, hiring external consultants leads to lower overall costs for organizations. However, having internal consultants can also lead to lower costs by project because of the "organization's long-term commitment to employment" (McLean, 2005, p. 15).

Roles of HRD consultants

Scholars (see Block, 2011; Greiner & Metzger, 1983; Saxton, 1995; Schein, 1999; Watkins, 1989) proposed diverse roles that consultants may assume when engaging in the consulting relationship with their clients. For instance, Saxton (1995) suggested three different consultants' roles (i.e., expert, provocateur, and legitimizer), and the way they can be involved in the decision-making process of organizations. As an expert, the consultant brings his/her expertise in relation to the business or function such as the HRD function. According to Greiner and Metzger (1983), the benefit to the

organization in the case of the expert is his/her expertise, which might be too expensive to maintain internally. As a provocateur, consultants are incorporated usually in the early stages of the strategic decision-making process, to help identify information, needs, ask difficult and maybe unexpected questions, and challenge the current situation. In the role of provocateur, consultants may "provoke the management team into looking at problems in new ways, provide additional information on environmental factors, and challenge existing organizational biases" (Saxton, 1995, p. 50). The consultant as a legitimizer can verify or elaborate further on information that the organization already suspects or believes may be true, and/or legitimize a particular strategic decision. Likewise, consultants may recommend or validate a strategy, focusing on implementation instead of diagnosis (Greiner & Metzger, 1983).

Other roles of consultants are: (a) educators and facilitators in corporate training and simulations; (b) hatchet men in the downsizing process; (c) catalysts to break organizational inertia; and, (d) change agents (Cooper, 2012; De Jong & Van Eekelen, 1999; Saxton, 1995). Also, consultants are involved in other aspects of organizational processes such as organizational design (Visscher, Irene, & Visscher-Voerman, 2010; Watkins, 1989).

Watkins (1989) proposed the five philosophical metaphors approach to HRD theory and practice. Under this perspective, the HRD consultant can be seen as a(n) (a) organizational problem solver: designing instructional programs to respond to organizationally defined problems; (b) organizational change agent/interventionist or helper: helping or assisting people and organizations through change; (c) organizational

42

designer: diagnosing and selecting the structure and forma system of communication, authority, and responsibility to achieve organizational goals; (d) organizational empowerer/meaning maker: transforming people and organizations to foster long-term health and effectiveness; and (e) developer of human capital: assisting and giving opportunities for training, expected turnover, age of retirement, and promotability.

Based on Schein's (1999) work on process consulting, Block (2011) proposed three ways consultants work with managers: (a) expert, (b) pair-of-hands, and (c) collaborative. One-way managers relate to external consultants is client-to-expert where the consultant "becomes the expert in the performance of a given task" (Block, 2011, p. 22). Moreover, when assuming the pair-of-hands role, it's expected from consultants to apply specialized knowledge to implement action plans toward the achievement of goals defined by the manager. Finally, the consultant who assumes a collaborative role "enters the relationship with the notion that management issues can be dealt with effectively only by joining his or her specialized knowledge with the manager's knowledge of the organization" (Block, 2011, p. 25).

The consulting process and related skills

Five phases constitute the overall consulting process (Block, 2011; McLean, 2005, Nevis, 2001). Following is a brief description of each phase.

1. Entry and contracting. In this phase, consultants initiate contact with a client about a project. It includes setting up the first meeting as well as exploring what the problem is, whether the consultant is the right person to work on the issue, client's and consultant's expectations, and how to get started (Block, 2011).

2. Block (2011) called the second phase of the consulting process "discovery and dialogue" (p. 6). However, other scholars refer to it as diagnosis (Nevis, 2001) or organizational assessment and feedback phase (McLean, 2005). Throughout this stage, consultants will come up with their own sense of the problem by assessing or diagnosing the problem/situation. Moreover, the consultant needs to define who is going to be involved in defining the problem, methods to be used, type of data that should be collected, and how long it will take (Block, 2011).

3. Planning. After the data collection process, the consultant should reduce the data into a manageable number of issues. It is recommended the consultant involve the client in the analysis. This phase is critical considering the consultant provides feedback about his or her findings and there is resistance to the data (Block, 2011). This phase also includes setting goals for the project and selecting the best action steps or changes.

4. Engagement and implementation. This stage is also known as action (Nevis, 2001) or implementation phase (McLean, 2005). This involves carrying out the previous phase or defined implementation. During this phase, data gathered by the consultant are used to motivate individuals or groups to "unfreeze or begin changing, and to initiate the change process" (Nevis, 2001, p. 43). Block (2011) suggested that some projects start implementation with an educational event or training to introduce the process.

5. Extension, evaluation, or termination/separation. This phase usually begins with an evaluation of what went on during the previous stage. Following is the

decision of whether to extend the process to a larger segment of the organization.

Block (2011) stated that "sometimes is not until after some implementation

occurs that a clear picture of the real problem emerges" (p. 7). In this case, the

process recycles and a new contract needs to be discussed (McLean, 2005).

Termination or separation from the client should be considered a "legitimate and

important part of the consultation" (Block, 2011, p. 7). If done correctly, it can

provide an important learning experience for the client and the consultant.

Based on the aforementioned process, consultants must possess different skills to

effectively engage in consulting (i.e., the initial contact, planning meeting, data

collection, feedback, and decision-making meetings, etc.). Consultants' skills can be

classified in three broad areas: (a) technical skills, (b) interpersonal skills, and (c)

consulting process skills (Barcus & Wilkinson, 1995; Block, 2011). Technical skills

include both understanding and experience in a discipline such as I/O psychology that

qualify an individual to be considered an expert. Interpersonal skills include personal

attributes that make an individual sociable to people and effective in accomplishing

desirable objectives through people (Barcus & Wilkinson, 1995). The consulting process

is the step-by-step approach used by consultants to (a) determine the root cause of a

problem, (b) identify possible solutions, (c) select the most appropriate alternative for

intervention, and (d) implement the chosen solution. Understanding this process and

"using it to solve business problems constitute consulting process skills" (Barcus

&Wilkinson, 1995, p. 4-1).

Rationale

Based on the purpose and nature of my research, consulting principles and theory were selected as one of the supporting bodies of literature included in the conceptual framework of the study, allowing me to elaborate on the last research question posed: What is the profile of independent HRD consultants, and features of the consulting business? Consulting principles and theory provided support to explore and analyze independent HRD consultants' roles and additional qualifications needed to work in this field.

The Colombian Context

Colombia has the fourth largest economy in South America and the third largest population, after Brazil and Mexico (DANE, 2015). It has significant natural resources, and substantial oil reserves. Its ethnic mix includes descendants of Africans brought as slaves, Spanish colonists, original native inhabitants, and immigrants from Europe, and the Middle East.

Colombia has coastlines on the Atlantic and Pacific oceans, covering about 440,000 square miles. It borders Ecuador and Peru to the south, Brazil and Venezuela to the east, and Panama to the northwest. Moreover, the Isthmus of Panama connects Colombia to Central America. Colombia is also comprised by several islands in the Atlantic and Pacific, which are considered natural wildlife reserves. Furthermore, the country has been impacted by "decades-long violent conflict involving outlawed armed groups, drug cartels and violations of human rights, although since 2002, the country has been making significant progress towards improving security" (BBC, 2015, para. 2). In

the following sections, I discuss briefly the national context of Colombia, including its political, economic and cultural contexts, and its education and workforce systems.

Political Context

Colombia has been led by two traditional parties since its independence in 1819: Liberal and Conservative. Nowadays, it is possible to identify independent parties that have contributed to its current political context. Colombian democracy has been challenged by ongoing violence by guerrillas and paramilitary groups, both with ties to the extensive narcotics industry. Nonetheless, current President, Juan Manuel Santos, is leading a determined agenda for social reform, as evidenced by the passing of a Victims and Land Restitution law in 2011, and the launching of peace negotiations with the Revolutionary Armed Forces of Colombia (Fuerzas Armadas Revolucionarias de Colombia, FARC).

Economic Context

Based on the World Economic Forum Global Competitiveness Report 2014-2015, Colombia's GDP is over USD 381.8 billion "thanks to austere government budgets, efforts to reduce public debt, export-oriented growth, and improved security and government policies" (Brunner et al., 2012, p. 48). These strategies made the country's economy expand faster than the rest of Latin America between 2002 and 2008 (Brunner et al., 2012). The leading economic activity in Colombia has been agriculture, with coffee as the major crop. However, since 1991, oil has replaced coffee as the country's leading export product.

Cultural Context

Spanish is the official language with at least 40 indigenous languages in co-existence. English is not spoken widely. Furthermore, as in many Latin American countries, Colombians generally place high value on personal relationships (i.e., both social and business settings), and consider family the primary social unit. According to the World Fact Book (2015), Colombia's cultural diversity derives from its mixed ethnicity: 58% mestizo—Spanish, indigenous and black, 20% white, 18% Afro-Colombian, 3% black-Amerindian, 1% Amerindian. Most Colombians consider themselves to be Catholics. The Church has historically had a multi-level, wide-spread influence in many areas such as marriage, family life, education, social welfare, and union organization.

Education

Colombian education has witnessed major improvements at all levels, thanks to the "education revolution" since 2002 (Brunner et al., 2012). Education is regulated by the Ministry of Education, and the language of instruction is Spanish. There are schools where instruction is delivered in English, German or French, but only in private schools. Higher or tertiary education is considered a cultural public service. There are four types of tertiary institutions: universities (e.g., undergraduate and graduate programs, specially masters and doctoral degrees); university institutions (e.g., undergraduate programs and a graduate program known as specialization); technological institutions (e.g., programs up to technologist level); and professional technical institutions (e.g., professional/technical level training for a particular job or career) (Brunner et al., 2012).

Workforce System

Although labor regulation is in compliance with the guidelines set by the International Labor Organization (ILO), Colombia has been characterized by social inequalities and a centralized power structure (Ogliastri, & Davila, 1983). A minimum monthly legal wage is agreed upon annually between the government and labor unions or set by governmental decree. Currently, the monthly wage is COP 689,455, which is equivalent to USD 217. Labor law regulates employment relationships, covering the areas of individual and collective labor law, and social security. The ordinary work day comprises of a maximum of 8 hours and up to 48 hours weekly. Companies use different types of contracts to hire personnel: indefinite term, fixed term, and duration of work contracts. Regarding workforce demographics, the number of unemployed has fluctuated since January 2015, with current unemployment at 8.9% (DANE, 2016).

Empirical Research on HRD in Colombia

The last section of this chapter encompasses a review of empirical studies in terms of HRD practices in Colombia, and its independent HRD consulting field. First, the method for selecting and analyzing the literature is presented. Second, HRD practices in Colombia are discussed. And finally, I conclude by presenting documented outcomes of independent HRD consulting in Colombia.

Searching and Organizing the Empirical Literature

The critique typology used was narrative review of literature. Hart (1999) suggested that narrative reviews are inclusive of different studies from which conclusions might be drawn into a complete interpretation, and contributed by the

researchers' own experience, existing theories, and models. The first phase of the search

process was conducted using Google Scholar, ProQuest, and three peer-reviewed

journals in the HRD field, such as *Human Resource Development Review*, *Human*

Resource Development Quarterly, and *Human Resource Development International*. To

guide the search, keywords in English were used, independently or in combination:

human resource, development, practices, interventions, and consulting. Since the study

was conducted in the context of Colombia, keywords in Spanish were used

independently or in combination, such as gestión humana, recursos humanos,

consultoría, asesoría, desarrollo, intervenciones, practicas. For the second phase of the

search process, synonyms of keywords were applied, as well as Boolean operators such

as *and*, *or,* and *not*. The Boolean operator *not* excluded, and *or* expanded the search.

These operators allowed me to focus and narrow my search. The third phase was the

application of inclusion and exclusion criteria for the data search. Primary databases

included ERIC-EBSCO and Business Source Complete since they were most related and

relevant for my research topic.

For inclusion in this review, articles were: (a) published in peer-reviewed

journals, (b) published between 1990 and 2016, and (c) empirical, theoretical, and/or

conceptual studies focused in HRD consulting. Additionally, literature reviews,

systematic reviews, and meta-analysis were included because they served as the

background of the study. Regarding the exclusion criteria for the search, articles were

excluded if they focused on fields different from HRM, HRD, Management, and I/O

Psychology. Moreover, studies not related to the topic, editorials, abstracts, posters, and other types of non-research-based studies were excluded from the search.

RefWorks was used to facilitate organization and control of the research data. This software helped me track the number of articles, and how these were classified, based on the topic (e.g. HRM and HRD consulting, Management consulting). RefWorks helped me organize documents and create instant citations and bibliographies. The analysis of literature was conducted using a review matrix. The matrix allowed me to code, analyze, and summarize selected studies into categories or themes. Findings of the reviewed literature are presented in Table 1.

Table 1 *Literature Review Matrix*

Title	Author(s), Year	Source	Purpose	Mayor Findings
Gestión humana en la empresa colombiana: sus características, retos y aportes. Una aproximación a un sistema integral. // Human Resource Management in Colombian Businesses: Its Characteristics, Challenges, and Contributions. An Approach to an Integral System	Calderon, Naranjo, & Alvarez (2010)	Cuadernos de Administración, 23(41), 13-36.	This article establishes the status of this issue in Colombian businesses, from the resource and capability-based view of the firm and through research that integrates a descriptive focus with a comprehensive one.	According to the results, human resource areas are gaining maturity; the area is acknowledged as an organizational capability and the personnel as a source of success; and practice systems are appreciated as a condition for human resource management to add value.
Gestion Humana: tendencias y perspectivas // Human Management: Tendencies and perspectives	Saldarriaga (2008)	Estudios Gerenciales, 24(107), 137-159	This article refers to the trends and perspectives of human management that have been imposed currently on the world, and which in their way, try to optimize the management of the personal in the organization and contribute to the development and increase of the productiveness.	State of the art study to determine recent tendencies about this topic what let the authors conclude that the discourses about these tendencies describe a human being that is "rescue" inside the organization, which not necessarily corresponds to the reality of the human management process followed inside national and international organizations.

Table 1 Continued

Title	Author(s), Year	Source	Purpose	Mayor Findings
La gestión humana en Colombia: características y tendencias de la práctica y la investigación. // Human resource management in Colombia: characteristics and trends of practices and research.	Calderon, Naranjo, & Alvarez (2007)	Estudios Gerenciales, 23(103), 39-64.	This analytical study reviews the relationship between the modernization of business practices and human resource management in Colombia.	A description of the characteristics of human resource departments and practices, including a description of the labor market and employee relations consistent with human resource management. The last part discusses the generation of knowledge in this country, taking into account the three most relevant perspectives, namely, the sociological, humanist, and strategic perspectives, of which the latter links human resource departments and practices with the strategic objectives and goals of an organization, considering that its intangible assets are the main source of its sustainable competitive advantage.

Table 1 Continued

Title	Author(s), Year	Source	Purpose	Mayor Findings
Caracterización de las prácticas de talento humano en empresas del valle del cauca // Characterization of human talent practices in companies of Valle del Cauca	Orrego (2015)	Revista Internacional Administración & Finanzas, 8(4), 1-25	Organizations must be characterized by their adaptation to the environment in which they compete. We wish to identify, through this descriptive research, how the organization manages its human talent, in order to define improvement actions to enable it to perform a truly strategic role.	When applying a questionnaire to 25 companies in Valle del Cauca, researchers discovered, among other findings, that the majority of companies have a formal strategic plan but not one for human management. The role of the human management area remains operational. There is not a culture of attracting and retaining top talent, and therefore, it is necessary for companies to adopt a more holistic view about how to manage talent.

Table 1 Continued

Title	Author(s), Year	Source	Purpose	Mayor Findings
Human Resource Management in Colombia	Ogliastri, Ruiz, & Martinez (2007)	Ch.9 of Managing human resources in Latin America: an agenda for international leaders	This review provides a focus on context as well as a historical perspective. It refers to companies which operate in Colombia, nationally owned or not, and the differences in HRM between various companies.	A review of the Colombian environment and the evolution of HRM is presented. The presence of a strategic perspective is analyzed. The current state of selection, contracting, labor market, compensation, training and development, negotiation, and company labor relations trends is evaluated.
La consultoría de Gestión Humana en empresas medianas // Human resources consulting for medium-sized companies	López, Sepúlveda, & Arenas (2010)	Estudios Gerenciales, 26(114), 149-168.	The article is the result of a research study aimed at describing the marketplace for human resources consulting for medium-sized companies in Medellin, Colombia. It identifies the concept and the characteristics of management consulting and discusses its relevance to all human resources processes.	Researchers identified the attributes of companies that demand these services and their human resources departments, the composition of consulting companies, current and future consulting needs and offers, the purchasing process, and the most frequent difficulties faced by consulting projects.

Table 1 Continued

Title	Author(s), Year	Source	Purpose	Mayor Findings
Strengthen management consultancy capacity in Colombia. The experience of learning by doing course	Schnarch & Van Hoof (2011)	Proceedings of the IMSCI 2011-5th International Multi-Conference on Society, Cybernetics and Informatics, USA, 1, 271-276.	This paper illustrates how a leaning-by-doing consultancy course at the Universidad de Los Andes, School of Management contributes to the dynamism of local management consultancy market in two levels: First, it gives management students and future managers the expertise to use management consultancy as a decision-making tool. Second, the program enables students to develop competences and methodologies that are valuable for consultants and managers.	The study is one of the first academic explorations of the management consultancy practice in Colombia. Its results indicate trends and challenges that differ clearly from the conditions in more industrialized economies. Aside the international consultancy firms that offer, since various decades, their services to a small group of exclusive companies, management consultancy seems to be in the early stage in the country. Certified capacity building and professionalization of a dynamic and high-quality consultancy infrastructure is needed.

Table 1 Continued

Title	Author(s), Year	Source	Purpose	Mayor Findings
El mundo de la consultoría empresarial // The world of entreprise consulting	Gomez & Munera (1998)	Tecnología Administrativa, 28(12), 13-39.	This review includes the analysis of the world of enterprise consulting by means of a historical comprehension of its appearing in the enterprise scenery, the creation of conceptual bases from a study of the practice and the tendencies of its future development.	This work offers managers, advisors, and consultants, common meanings about the field allowing them to strengthen their negotiation and communication processes. It offers administrative tools to spread effectively the management strategy. It opens the doors so managers and other professionals who offer these services to assist in the definition of variables to obtain better results in the organization.
Estudio de caracterización de consultoría // Characterization of the consulting field	Servicio Nacional de Aprendizaje (SENA) (2015)	Retrieved from http://repositorio.sena.edu.co/handle/11404/2104	This study explains the occupational, technological, organizational, economic and educational environment, and the trends and projections of the consulting sector in Colombia. Its purpose is to strengthen the basis for the creation of policies and standards of labor competency.	Offers a characterization of the consulting field in Colombia. This study was conducted in 2006 but issued in 2015.

Table 1 Continued

Title	Author(s), Year	Source	Purpose	Mayor Findings
Necesidades de consultoría en las MIPYMES del Valle de Sugamuxi en Boyacá // Needs for consultancy in micro and SMES in Valle de Sugamuxi in Boyacá - Colombia	Gonzalez, Rodriguez, & Duarte (2012)	Cuadernos de Administración, 27(46), 67-80.	This article gathers the most relevant elements of the research titled "Estudio de necesidades de Consultoría empresarial en el valle de Sugamuxi, en el departamento de Boyacá", conducted by the Management research group at UPTC, which applied 354 surveys to managers of the companies (Micro and SMEs) belonging to the region.	The study determined the current situation of the companies, object of study, on the needs for business consultancy, the diagnosis of the differences between advisory and consultancy, identification of areas and neuralgic topics of this service, identification of the most relevant qualitative and quantitative factors for the creation of consultancy centers.

Table 1 Continued

Title	Author(s), Year	Source	Purpose	Mayor Findings
The informal labor market in Colombia: identification and characterization	Bernal (2009)	Desarrollo y Sociedad, 63, 145-208	The main objective is to understand what types of individuals belong to formal and informal sectors, study the incentives and motivations of workers for belonging to one or other segment of the labor market, and analyze the consequences of not being covered by the regulatory framework. In doing this, we hope to gain some understanding about how different policy interventions could influence individuals' occupation choices and workers' well-being.	Social security contributions are a reasonable measure of informality as it is a good indicator that the individual has the entire package of benefits associated with formal employment. Researcher used the definition of informality to characterize informal workers in various dimensions that include socio-demographic characteristics, characteristics of the firm and job satisfaction measures.

The thematic analysis, followed by the empirical literature reviewed is presented around three main themes: (a) HRD practices and challenges, (b) opportunities for HRD, and (c) the consulting field in Colombia.

HRD Practices and challenges in Colombia

In Colombia, HRD practices and/or interventions can be identified under the umbrella of Human Resource Management (HRM). Main practices can be classified into two broad categories: functional or traditional practices (i.e., selection and retention, training and development, performance appraisals, compensation, and employee welfare), and emerging practices (i.e., organizational climate and culture appraisals, organizational communications, social responsibility, and outplacement) (Calderon, Naranjo & Alvarez, 2007, 2010; Orrego, 2015; Saldarriaga, 2008).

Among a number of challenges facing Colombia in terms of HRD practices, three stood out from the reviewed literature. The most prominent challenge is talent attraction and retention (Calderon et al, 2010; 2007). Second, managing different generations at the workplace have become a critical issue in Colombian organizations (Calderon et al, 2010; Saldarriaga, 2008). Third, HRD practitioners face challenges of becoming facilitators, or change agents, of organizational transformation (Calderon et al, 2010). Other key challenges documented in the literature for HRD practitioners include employee engagement and commitment, leadership development, organizational change, succession planning, outsourcing, organizational development, and international management of human resources (Calderon et al., 2010, 2007; Orrego, 2015; Saldarriaga, 2008).

Finally, an issue affecting Colombia and its workforce is the practice of informal employment because of public sector corruption and minimal government regulation (Williams & Youssef, 2014). Informal employment encompasses persons who, by law or

in practice, are not subject to national labor legislation or entitled to social protection and employment benefits (ILO, 2013). This points to the need for standardizing employment systems to reduce inequality and social exclusion. Doing so enables organizations to adopt measures that promote formal employment, wage labor, and social protection coverage (ILO, 2014). From 2008 to 2015, informality in Colombia was reduced from 67.4% to 62% (Consejo Privado de Competitividad, 2016) thanks to the implementation of the Decree 1607 in 2012, reducing the non-salary labor costs.

Opportunities for HRD in Colombia

The key challenges presented earlier point to many opportunities for HRD. In the area of talent attraction, HRD can take a leading role, including, helping organizations create a talent conducive culture, making strategic talent planning, and conducting talent assessments to identify current gaps and forecast future needs. For talent retention, HRD practitioners can help design a reward system that warrants effective performance management, continuous performance improvement, competitive compensation and benefits plans, and increased employee engagement through strategies such as job rotation, job enlargement and enrichment, awards, and recognitions.

Regarding managing different generations, again, HRD can play an active part. For example, HRD practitioners can provide educational programs or diversity management workshops to help organizational members at all levels learn about unique characteristics associated with different generations (e.g., values, expectations, work ethics, and work styles). With such knowledge, organizations can identify and utilize the strengths of each generation to their competitive advantage; they also will be in better

position to help reconcile conflicts resulting from generational differences. HRD practitioners can help create a mentoring program that encourages cross-generation interactions, job coaching, long-term mentorship, and reverse mentoring.

The dynamic changing national and organizational contexts in Colombia require solid understanding of change and skills for managing it effectively. This presents an exciting opportunity for HRD practitioners to take a more strategic role within organizations. HRD practitioners must be involved more actively with business strategy development and organizational design so they truly can become strategic partners with business, rather than supporters of it. In addition, HRD practitioners can help establish communication channels that allow for timely and transparent communications between top management and employees. This strategy is particularly important in facilitating change and reducing change resistance.

Finally, to address the issue of informal employment, HRD can play a key role by helping organizations formulate formal policies for talent management. In a relationship-based society such as Colombia, having standardized processes and procedures may be useful particularly in reducing personal biases in employment practices. This could lead to a work climate where personal competence and achievements are valued more than personal connections and feelings.

The consulting field in Colombia

Consulting has been recognized in Colombia as a professional service offered to help managers analyze and solve problems faced by their organizations, and to learn from other organizational experiences (Gomez & Munera, 1998). According to Schnarch and Van Hoof (2011), Colombia's consultancy industry has more than 15 well-developed professional firms such as Deloitte Consulting, Price Water House Consulting, KPMG Advisory, McKinsey, Ernst and Young Consulting, Accenture, Booz Allen, and Remolina and Estrada, among others. In addition, the market is overwhelmed by a large group of small formal and informal consultancies (Schnarch & Van Hoof, 2011). By 2008, 95% of the 1,500 registered consulting firms were micro (i.e., had less than 10 employees) and nearly 70% of Colombian consultants were independent (Misión PYME, 2008). According to Lopez, Sepulveda, and Arenas (2010), the demand for consultants' services in Colombia has been focused on training, selection, compensation, occupational health and competency management. The most implemented administrative practices have been quality assurance, organizational climate assessment, strategic planning, management skills, 360-degree evaluation, compensation systems, and organizations' social responsibility (Lopez et al., 2010).

Even though the arrival of international consulting firms to Colombia strengthened the practice and enforced new professional standards for consulting (Schnarch & Van Hoof, 2011), according to the Departamento Administrativo Nacional de Estadística (DANE, 2016), informal employment and high rates of unemployment led people to become independent consultants in Colombia. The governmental organization,

63

Servicio Nacional de Aprendizaje (SENA, 2015), proposed that in lesser-developed

countries such as Colombia, services offered by consultants have been considered one of

the contributing variables to the country's social and economic development.

CHAPTER III

METHOD

In this chapter, I discuss the methodological choices adopted in this study. I restate the purpose and research questions, followed by a discussion of the qualitative research design and its major characteristics. Then, the philosophical underpinnings of the study are presented, followed by the research framework, and the methods for sampling, data collection, and data analysis. I conclude by reflecting on my experience and sharing lessons learned as researcher.

Purpose and Research Questions

The overarching purpose of this exploratory study was to identify learning experiences of independent HRD consultants that helped them improve their practice and develop expertise in Colombia. In addition, my aim was to provide a framework for the (a) consulting business, process, and services; (b) profile of independent consultants; and, (c) knowledge, skills, and attitudes required to be an effective consultant in Colombia.

The research questions that guided this study were:

1. What are the learning experiences that helped independent HRD consultants improve their practice and develop expertise in Colombia?

2. What are the knowledge, skills, and attitudes required to be an effective independent consultant?

3. What is the profile of independent HRD consultants, and features of the consulting business?

Qualitative Research

Denzin and Lincoln (1994) proposed that qualitative research – as a set of interpretative practices – is "multimethod in focus, involving an interpretative, naturalistic approach to its subject matter" (p. 2). Qualitative research encompasses the use and collection of various empirical materials (e.g., case study, personal experience, introspective, interviews, etc.) that describe meanings in individual's lives (Denzin & Lincoln, 1994). Thus, qualitative researchers make sense of, or interpret phenomena by studying things in their natural settings, and in terms of the meanings people bring to them (Denzin & Lincoln, 1994).

There are certain features that characterize qualitative research studies. Although not all qualitative studies necessarily display all characteristics, these features "taken together provide with an overall picture of what is involved in this type of research" (Fraenkel & Wallen, 2009, p. 422). Following are brief descriptions of the ten characteristics of qualitative research identified by Patton (2002).

1. Naturalistic inquiry: qualitative researchers study real-world situations as they unfold naturally (i.e., openness to whatever emerges). There is no manipulation, qualitative research is unobtrusive and non-controlling.

2. Inductive analysis: immersion in the details and specifics of the data to discover important categories, dimensions, and interrelationships. Qualitative

researchers begin by exploring genuinely open questions rather than testing theoretically derived hypotheses.

3. Holistic perspective: the whole phenomenon under study is understood as a complex system that is more than the sum of its parts. According to Patton (2002), "the focus is on complex interdependencies not meaningfully reduced to a few discrete variables and linear, cause-effect relationships" (p. 40).

4. Qualitative data: detailed and thick description, capturing people's personal perspectives and experiences.

5. Personal contact and insight: the researcher has direct contact with and gets close to the people, situation, and phenomenon under study. Patton (2002) proposed that "the researcher's personal experiences and insights are an important part of the inquiry and critical to understanding the phenomenon" (p. 40).

6. Dynamic systems: qualitative researchers pay attention to the process, assuming change is constant and ongoing whether the focus is on an individual or an entire culture.

7. Unique case orientation: each case is special and unique.

8. Context sensitivity: findings are derived from the social, historical, and temporal context.

9. Empathic neutrality: complete objectivity is impossible while pure subjectivity undermines credibility (Patton, 2002). It is important for

qualitative researchers to assume a neutral nonjudgmental stance toward the

process and whatever content that may emerge.

10. Design flexibility: for qualitative research, it is important to "avoid getting

locked into rigid designs that eliminate responsiveness" (Patton, 2002, p. 40).

That is, being open to adapting inquiry as understanding deepens and/or

situations change.

These characteristics provided a holistic view of the features of qualitative research studies. Nonetheless, Fraenkel and Wallen (2009) proposed five steps to follow when conducting qualitative research (Figure 6).

Identification of the phenomenon

Identification of participants

Data collection

Data analysis

Interpretation and conclusions
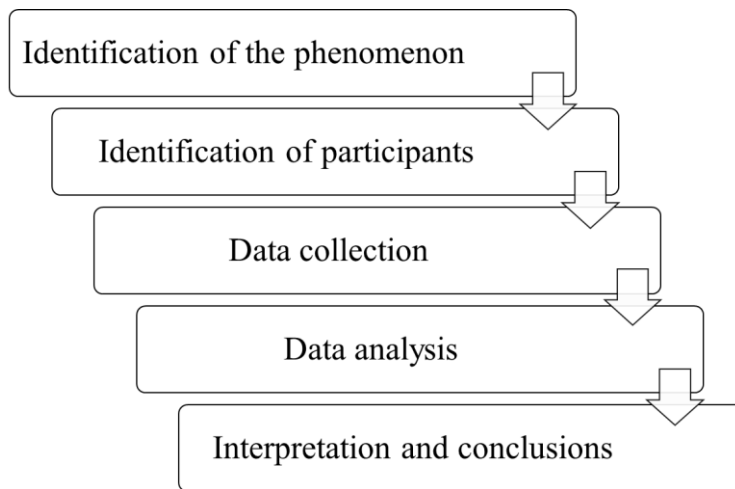
Figure 6. Steps in qualitative research.

Based on the purpose and nature of my study, a qualitative research approach was selected as the most appropriate choice for two specific reasons. First, because qualitative researchers interpret phenomena by studying it in terms of the meanings people bring to them (Denzin & Lincoln, 1994), the holistic perspective of qualitative inquiry allowed me to explore and identify the learning experiences of independent HRD consultants that helped them improve their practice and develop expertise in Colombia. In addition, qualitative approach facilitated the collection of rich and detailed data by capturing participants' perspectives and experiences, allowing me to immerse into the details and specifics of the (a) consulting business, process, and services; (b) the profile of independent consultants; and, (c) knowledge, skills, and attitudes required to be an effective consultant in Colombia. This inductive and interpretative process is further discussed in the following sections.

Philosophical Orientation

How people view reality, or the world, influences the methodology and methods researchers choose to investigate the phenomenon of interest (Hesse-Biber & Leavy, 2001). From an ontological dimension, our social world is being constructed continually through human interactions. Furthermore, reality is seeing through many different views, and therefore, it is possible to talk about multiple realities. From an epistemological dimension, the knower is considered to be the research participant, also the one who lived the experience. Hence, the relationship between me (the researcher) and research participants is understood as a co-constructed space to explore and identify learning experiences of independent HRD consultants in Colombia.

Creswell (2013) proposed the aforementioned philosophical assumptions "are embedded within interpretative frameworks that qualitative researchers use when conducting a study" (p. 22). Aligned with my theoretical framework, a constructivist approach was adopted to gain a "deep insight into the complex world of lived experience from the point of view of those who live it" (Schwandt, 1994, p. 118). Specifically, social constructivism asserts that social meaning is shaped through people's interactions. Therefore, "different social actors may understand social reality differently, producing different meanings and analyses" (Hesse-Biber & Leavy, 2001, p. 27). Additionally, from the social constructivism perspective, individuals develop subjective experiences-meanings which are varied and multiple, "leading the researcher to look for the complexity of views rather than narrow the meanings into a few categories or ideas (Creswell, 2013, p. 24). Hence, the goal of research is to rely on participants' views of their situations. Researchers within the social constructivist perspective recognize their background shapes their interpretation, and they position themselves in the research to acknowledge how their interpretation flows from their personal, cultural, and historical experiences (Creswell, 2013). Therefore, researchers make an interpretation of what they find, an interpretation shaped by their experiences and background. The researcher's intent then, is to make sense (or interpret) the meanings others have about the world.

In conclusion, philosophical assumptions such as ontology and epistemology, take different forms, based on the interpretative framework used by the researcher (Creswell, 2013). From a social constructivist perspective, the nature of reality (ontological belief) is seen as multiple and contrasted through our lived experiences and

interactions with others. On the other hand, how reality is known (epistemological belief) is seen as co-constructed between the researcher and the participant and shaped by individual experiences. Therefore, based on the overall purpose of my study and the research questions posed, the social constructivist perspective was the most appropriate approach to explore the learning experiences of independent HRD consultants in Colombia.

Research Framework

Based on the overarching purpose of this exploratory research, a basic interpretive qualitative approach (Merriam, 2002) was adopted (Figure 7). The sampling procedure, methods for data collection, and data analysis are described, as well as the strategies that were adopted to ensure trustworthiness of the study.
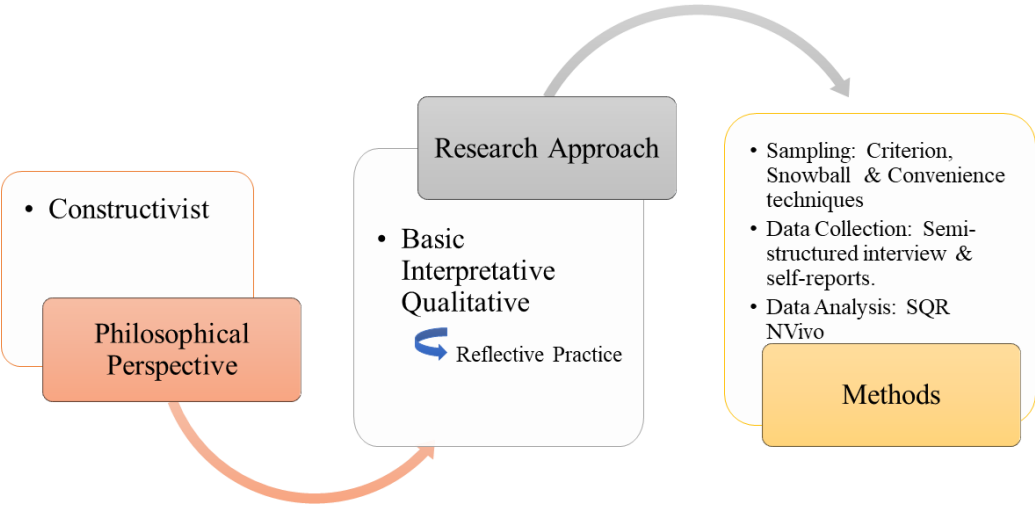
Figure 7. The research framework.

Merriam (2009) proposed the following characteristics of the basic interpretive approach: (a) the goal is to understand the meaning people construct and attribute to their experiences; (b) social life is studied in its natural setting; (c) people are the primary research instruments because only the human instrument is flexible enough to grasp multiple realities; and (d) research process is inductive, through which the data from interviews, observations, and documents are combined into themes and categories (Lincoln & Guba, 1985; Merriam, 2009). The basic interpretive approach holds the essential characteristics of qualitative research facilitating the integration of reflective practice into the research approach adopted. Considered as central to professional development (Schön, 1987), reflective practice was chosen as the method for exploring experiences that helped improve the way independent HRD consultants work and develop expertise in Colombia. Furthermore, York-Barr et al. (2001) highlighted reflective practice as: (a) deliberate slowing down to consider multiple perspectives, (b) preserving open perspective, (c) active and critical thinking, and (d) examination of beliefs, goals, and practices. These components became the guiding framework for the selection and design of data collection.

Two basic processes (i.e., reflection-on-action and reflection-in-action) have been identified as essential to reflective practice. Based on the purpose and research questions posed, reflection-on-action was considered the appropriate approach to facilitate the reflection of participants' experiences after they happened, by increasing self-awareness, and improving creative thinking and problem-solving skills. The type of data used under this research approach includes past and current experiences, and tacit

knowledge about practice, which is "the knowledge that we use every day without thinking about it" (Merriam et al., 2007, p. 172).

Sampling procedure

Some of the questions regarding an appropriate research sample are related to what to observe and how many cases are needed to guarantee that research will generate sufficient and valuable information. Luborsky and Rubinstein (1995) highlighted an important distinction to make between probability and non-probability samples. Probability sampling is considered the most rigorous approach to sampling for quantitative research. On the other hand, qualitative researchers use non-probability samples where participants (units or subsets) are purposefully selected to reflect particular characteristics of groups within a population.

Following approval by the Institutional Review Board (IRB) at Texas A&M University (Appendix A, B), 30 independent HRD consultants were invited (Appendix C) to participate in the study. The rationale behind the number of participants was that my goal was to collect in-depth information, trading breath for depth (Hesse-Biber & Leavy, 2001). Furthermore, the main sampling approaches proposed by Patton (2002) for qualitative research are: (a) purposeful, (b) theoretical, and (c) convenience sampling. Since the qualitative researcher's goal is to collect in-depth information, trading breath for depth (Hesse-Biber & Leavy, 2001), the sample was selected using purposeful and convenience sampling techniques. Ritchie and Lewis (2003) proposed different approaches to purposeful sampling "designed to yield different types of sample composition depending on the study's aims" (p.79). Therefore, snowball and criterion

sampling techniques facilitated the selection of participants. Criterion sampling comprises selecting cases that meet a pre-determined criterion of importance for the study. Snowball sampling is used to identify participants when suitable participants for a research study cannot be located (Dattalo, 2008). The goal of this technique is to select a few people who can identify other people, who can identify still other participants for the study.

Steps and criteria for selecting participants

A convenience sampling technique was implemented. First, my goal was to identify and recruit potential candidates through my professional and personal contacts. Throughout my career as an organizational psychologist, I established professional relationships with those currently working in organizations as specialists, analysts, and/or directors in the HRM and HRD fields. Because I previously worked as an independent HRD consultant in Colombia, I had colleagues with whom I established professional alliances to provide consulting services. Therefore, these colleagues became potential participants in my study. In addition, social networks such as LinkedIn and Facebook (Appendix D) were used to apply the snowball sampling technique because personal contacts can identify suitable participants who identify others who can identify still other participants for the study.

The following criteria were used for the selection of participants in my study:

1. Independent HRD consultants: contractors, freelancers, self-employed, or small business owners, considered as non-employees who provide a service or perform work for a company for an agreed price.

74

2. The main focus of their services should be on T&D, CD, and/or OD, as these are the core components of the HRD field.

3. Must be working as a full-time independent consultant.

4. Men and/or women living in major cities such as Bogota, Medellin, and/or Cali. These are considered the largest cities of Colombia, where the majority of businesses and industrial organizations are located. Therefore, it was expected that research participants were working in these cities because there is more access to clients for their consulting businesses.

5. Age and years of experience. In this study, it is expected that independent HRD consultants had developed a certain level of expertise, and it was assumed they had experience in the field. Research suggested (Bereiter & Scardamalia, 1993; Swanson & Holton, 2009) that to be considered an expert, a person "must have the equivalent of ten years of combined studies and related work experience" (Swanson & Holton, 2009, p. 263). For my study, independent consultants had to be at least 40 years old, hold a bachelors' degree (i.e., five years to complete an undergraduate degree in Colombia), and had a minimum of three years of consulting experience.

Although 30 possible participants were invited, only 12 agreed to participate in the study. After starting data collection, scheduling difficulties with one participant excluded the participant from the study. One other participant passed away before the interview process was completed, resulting in 10 participants for the study. I can't

assume that data saturation was reached. In fact, I will be making a mistake not recognizing that additional information from more participants, could have allow me to further elaborate on the three research questions proposed. However, considering the exploratory aim of my study, I decided to move on with 10 participants as a starting point to explore independent HRD consulting practice and expertise.

Furthermore, my rationale for including independent consultants with the aforementioned criteria was linked to the specific research goal of exploring learning experiences that helped independent consultants improve their practice at different levels of expertise (Table 2). In addition, age and years of experience were included because these variables require building portfolios, acquiring clients, and gaining experiences as independent consultants.

Table 2 *Demographic Profile of Study Participants*

Code	Gender	Samp. Tech.	Age	Exp.	City	Role[a]	Consulting Service	Type[b]
A1	M	Conv	67	20	Bogota	BO & C	Strategic Management, Coaching, and Human Resource Management	SM
A2	M	Snowball	42	20	Cali	CEO & C	Technological solutions applied to businesses (Human Resources 2.0, Knowledge Management)	SML
A3	M	Snowball	40	6	Bucaramanga	BO & C	Organizational reengineering, BSC, Organizational efficiency	ML
A4	F	Snowball	52	>17	Cali	BO & C	Career Development	SLMu
A5	M	Snowball	54	22	Cali	BO & C	Team building and Management Skills / Executive Coaching	ML
A6	M	Conv	44	>15	Bogota	C	Emergency, security and health administration (HSE). Emergency care and administration	M
A8	F	Conv	40	3	Cali	C	Human Resource Management	ML
A9	F	Snowball	50	>15	Cali	C	Strategic Management and Human Resource Management	ML
B10	F	Conv	40	7	Bogota	C & P	Strategic Management and Human Resource Management	MiSM
B11	F	Conv	40	3	Bogota	C	Philosophical Consulting for individuals and organizations	SML

Note. [a] BO = Business Owner, C = Consultant, CEO = Chief Executive Officer, P = Partner; [b] S = Small, M = Medium, L = Large, Mi = Micro, Mu = Multinational.

Data collection

Figure 8 presents the steps followed in the data collection process.


```
┌─────────────────────┐    ┌─────────────────────┐    ┌─────────────────────┐
│ Purpose and Research│ →  │    Submit IRB       │ →  │ Select participants │
│      Questions      │    │                     │    │ using purposeful and│
│                     │    │                     │    │ convenience sampling│
│                     │    │                     │    │      techniques     │
└─────────────────────┘    └─────────────────────┘    └─────────────────────┘

┌─────────────────────┐    ┌─────────────────────┐    ┌─────────────────────┐
│  Validate interview │ →  │   Redefine/modify   │ →  │ Contact participants│
│   protocol and self-│    │  instruments based  │    │ and arrange time and│
│ report through expert│   │   on expert's       │    │  date for interviews│
│        panel        │    │     feedback        │    │                     │
└─────────────────────┘    └─────────────────────┘    └─────────────────────┘

┌─────────────────────┐    ┌─────────────────────┐
│  Obtain consent to  │ →  │ Collect data through│
│   record before     │    │  in-depth interviews│
│ conducting interviews│   │   and written self- │
│                     │    │       reports       │
└─────────────────────┘    └─────────────────────┘
```

Figure 8. Data collection steps.

An interview protocol (Appendix E) was designed as the primary data collection method with the purpose of answering the research questions:

1. What are the learning experiences that helped independent HRD consultants improve their practice and develop expertise in Colombia?

2. What are the knowledge, skills, and attitudes required to be an effective independent consultant?

3. What is the profile of independent HRD consultants, and features of the consulting business?

Interviews are considered as conversations, with the goal of understanding the world from the participants' viewpoints and unfolding the meaning of their experiences (Hesse-Biber & Leavy, 2001). For this study, interviews were conducted with a fairly open structure to allow for a focused and conversational two-way exchange between participants and me. Specifically, an interview protocol was designed with semi-structured, open-ended questions (Appendix E). The protocol was validated through an expert panel before data collection started. Expert panels are used when specialized input and opinion is required for an evaluation (Hesse-Biber & Leavy, 2001). The panel was comprised of three experts with experience in research and the design of data collection instruments or protocols such as interviews. In this case, it provided validity for the instrument used for data collection.

Because I lived outside the country where participants were located, all interviews were conducted via GoToMeeting, facilitating the option of recording interviews that were later transcribed. Since audio recordings were optional, the informational sheet included a section disclosing use of audio recordings, providing participants the opportunity to consent to participate or decline, but still consent to participation in the study. On average, interviews lasted no more than 90 minutes. Follow up questions (Appendix F) were sent via email to gather additional information about the topics discussed during the interview.

To gain deeper understanding of independent HRD consultants' experiences, a written self-report or journal (Appendix G) was designed as a data collection method. Polkinghorne (2005) suggested that "the data gathered for study of experience need to

consist of first-person or self-reports of participants' own experiences" (p. 138), to capture the richness and fullness of an experience. Data collection processes lasted approximately three months, allowing me to conduct all interviews, and time for participants to write self-reports.

Participants who completed their interview and submitted a written self-report received a $20 Gift Card from Amazon through their email. Records of this study were kept private. No identifiers linking participants to this study were included in any report that might be published. Research records were stored securely, protected with a password, for which only the researcher had access.

Data analysis

Qualitative data analysis is the process that "transforms data into findings" (Patton, 2002, p. 432), synthesizes the socially-constructed data, and reconstructs them into meaningful wholes (Lincoln & Guba, 1985). Guided by the purpose and research questions of the study, following is a description of the data analysis process (Figure 9).

Step 1	
Review and explore data	Identify big/main ideas

Step 2			
Re-read and examine data	Code data	Place coded data in categories	Revise coding scheme (add, eliminate, and/or collapse codes)

Step 3	Chapter 4	
Formulate findings statements	Provide participants quotations	Summarize key findings

Step 4	Chapter 5
Analyze and synthesize findings by linking to experience, insights, and literature	

Figure 9. Data analysis road map.

My goal with the data analysis process was to consolidate, reduce, and interpret the data in meaningful ways. (Merriam, 2009). Therefore, to prepare data for analysis, interviews were transcribed verbatim. According to Hesse-Biber and Leavy (2001), "transcribing research data is interactive and engages the researcher in the process of deep listening, analysis, and interpretation" (p. 304). Transcription is considered as an active process which provides the researcher with the opportunity to engage with the research material from the beginning of data collection. Corresponding names to the pseudonyms assigned were kept in a separate electronic file and stored as confidential material in an encrypted folder.

Initially, data were classified based on type of instrument: interview, self-report, and follow-up questions. Then, questions were color-coded into possible categories of analysis. I created an inventory of all data sources that were entered into SQR NVivo software for coding and analysis. Through SQR NVivo, I was able to analyze interview transcripts; collect, import, organize, and classify data by categories; and, add interpretations and notes. After data were entered into SQR NVivo, I created nodes representing topics, concepts, ideas, and experiences. Finally, I organized the nodes into a hierarchy, helping me to refine my thoughts, and draw connections between categories. After this reflective process of connecting thoughts and categories, I realized the data were telling me something different than what I had initially proposed for my study. Therefore, I had to review Chapters I – III. Now, I had the theoretical and conceptual support to analyze, interpret, and make meaning of my findings.

Findings of the study are presented in Chapter IV, including statements in relation to the research questions, verbatim examples, categories, and descriptions of the experience. Discussion of findings, recommendations for future research, identification of limitations, and a discussion of implications are presented in Chapter V.

Trustworthiness

Qualitative research has its own specific ways of establishing rigor (Patton, 2002). Creswell and Miller (2000) suggested a variety of strategies to ensure trustworthiness of qualitative inquiry. Based on their criteria, I implemented three strategies:

1. Peer review or debriefing: Provides an external check of the research process and serves the same purpose as interrater reliability in quantitative research (Creswell, 2013). The role of the peer debriefer is presented by Lincoln and Guba (1985) as a devil's advocate. His or her role is to ask hard questions about methods, meanings and interpretations, and "provides the researcher with the opportunity for catharsis" (Creswell, 2013, p. 251) by listening to the researcher's feelings. I used peer debriefing at different stages of this study. For example, I tested the interview questions with a peer before interviewing the first participant. I asked for feedback on emerging themes from colleagues familiar with qualitative research. Peer debriefing contributes to the rigor of the study by increasing credibility or internal validity (Erlandson, 1993; Lincoln & Guba, 1985).

2. Member checking: This technique is one of the most important techniques to ensure trustworthiness in qualitative research (Lincoln & Guba, 1985). Through this technique, the researcher solicits participants' views of the credibility of the findings and interpretations (Erlandson, 2002), to verify the accuracy of the findings and interpretations and determine if the researcher's analysis represents

their experiences (Creswell, 2013). To employ member checking, I sent findings to participants and asked for their feedback. This strategy contributes to increasing credibility of the research, which is analogous to internal validity (Lincoln & Guba, 1985).

3. Clarifying researcher bias. This technique is important to understand the researcher's position and any biases or assumptions that may impact the study (Creswell, 2013). In this clarification, reflected on past experiences, biases, and prejudices that may shape the interpretation and approach to my study. Therefore, as a final attempt to increase trustworthiness in my study, a reflection about my role as the researcher was included in Chapter I.

Reflecting on My Experience

As soon as I received IRB approval to start collecting data, I started writing a journal to keep track of steps followed and to reflect on the different experiences I faced throughout the data collection process. I present here the key reflections on my experience as researcher.

I started data collection process on Sunday, March 12, 2017. My first attempt to recruit research participants was via social networks such as Facebook and LinkedIn. I was convinced this was going to be the most effective way to identify possible candidates to participate in my study. However, I found myself disappointed. The people I thought were going to be my key contacts did not respond to my messages. Only a few of my contacts shared my posts among their contacts. Other promised their assistance,

but it did not happen. Surprisingly, two of my friends (Industrial Engineers) were very active and shared the contact information of three possible participants. I never expected such valuable help from them. First lesson learned: you can't take things/people for granted. You can't assume anything, especially in research! This experience made me think about the importance of detailed criteria to identify research participants. I made a checklist to ensure that possible participants really met the selection criteria, which included:

1. Age.
2. Years of experience as an independent consultant (e.g., contractor, freelancer, self-employed, or small business owner, and considered as a non-employee providing a service or performing work for a company for an agreed price).
3. City.
4. Focus of consulting services (T&D, CD, OD):
   a. Training (topics).
   b. Career development (type of interventions).
   c. Organizational development (type of interventions).
5. Type of companies (micro, small, medium) and sectors (primary, secondary, tertiary) of consulting services.

The checklist was not part of the recruitment plan that I initially proposed. However, I was afraid of not being clear enough, too broad, and/or not as specific as I should have been in terms of participants' criteria. For example, one possible participant initially said that he met the criteria that I posted on social networks. However, when I sent the checklist to validate years of experience, age, etc., he didn't understand what I meant by areas of consulting services (T&D, CD, OD). In the training section, he provided his educational background. When I asked about career development, he asked me if it was his job experience, and asked me to specify what organizational development was. I realized he was not involved in the HRD field. Again, I assumed he was going to know what I was talking about or what HRD meant.

In the meantime, while I was recruiting participants for the study, I decided to test GoToMeeting (GTM) with my brother in Colombia. I scheduled a meeting and sent him the link. First, the information was in English and he didn't understand very well the instructions to access the meeting. I had to call him and walked him through the process of accessing it through GTM website. After he accessed the meeting, I was able to record for several minutes. However, this test made me realize that I needed to create a GTM Handout in Spanish (Appendix H), which was sent to participants with steps to follow so they could access the interview. Second lesson learned: even before you submit your proposal, be certain your data collection methods (i.e. technology) will work in other countries. Know the limitations of technology. Do not assume participants will know how to use it or that it is accessible outside the U.S.

At some point of the data collection process, I took pause to reflect about the attitude I was assuming when things didn't go as planned or expected. My peer debriefer helped me realize that I needed an open attitude, and to remain flexible, especially because I was conducting a qualitative study. The lesson I learned from this pause was: how many times would researchers fail during experiments, until they finally reach their expected outcome? Sometimes, the best outcomes are realized from failed trials, and those are better than expected outcomes. Although I adopted a qualitative approach for my study, I was experimenting with technology, cultural variables, and my role as a researcher. This is actually my first formal research study; I recognize that it humbled me, personally, professionally, and as researcher.

CHAPTER IV

FINDINGS

The findings of my research are presented in this chapter. First, the purpose and research questions are restated to contextualize the research outcomes. Then, findings of the study are presented including statements in relation to the research questions, verbatim examples, and descriptions of the experiences. Finally, I conclude with a summary of the chapter.

Purpose and Research Questions

The overarching purpose of this exploratory study was to identify learning experiences of independent HRD consultants that helped them improve their practice and develop expertise in Colombia. In addition, my aim was to provide a framework for the (a) consulting business, process, and services; (b) profile of independent consultants; and, (c) knowledge, skills, and attitudes required to be an effective consultant in Colombia.

The research questions that guided this study were:

1. What are the learning experiences that helped independent HRD consultants improve their practice and develop expertise in Colombia?

2. What are the knowledge, skills, and attitudes required to be an effective independent consultant?

3. What is the profile of independent HRD consultants, and features of the consulting business?

Findings

Findings are presented based on the three research questions proposed. However, to contextualize HRD interventions in Colombia, I consider important to present first, what HRD interventions entail from independent HRD consultants' perspectives (Table 3). This information was gathered through interviews with the purpose of contextualizing HRD practices in Colombia. Findings suggested that independent consultants placed high importance to the strategic alignment of organizational and individual development, perceiving themselves as strategic allies of the management of the client organization. They perceived companies as a way for human development and learning, highlighting two dimensions of human resources: productive and social.

Table 3 *Perspectives on Human Resource Development in Colombia*

Code	Gender	Age	Exp.	Definition of HRD (Spanish)	Key Components
A1	M	67	20	*"el recurso humano tiene dos escenarios: un recurso social, empresarial, productivo. Y hay otro recurso social y familiar de vida. Estas dos cosas tienen que ser unidas"*	Link between productive human resources (business perspective), and social human resources (interpersonal relationships perspective).
				"alinear rol y papel en la empresa, con su rol de vida"	Alignment between job and personal roles.
				"alinear el plan de vida de una persona con el plan empresarial desarrollándose desde el punto de vista humano y económico"	Alignment between personal and organizational plans, facilitating development of individuals from both human and economic perspectives.

Table 3 Continued

Code	Gender	Age	Exp.	Definition of HRD (Spanish)	Key Components
A2	M	42	20	*"el desarrollo del talento humano es la clave para salir adelante, es fundamental para que las organizaciones puedan crecer".*	Development of human resources as key for organizational growth.
A3	M	40	6	*"fomentar que el empleado crezca en una compañía, que crezca personalmente, que mejore sus competencias laborales, entonces para mí eso es desarrollo humano.*	Personal growth and improvement of job-related skills within companies.
A4	F	52	>17	*"área que debe estar estrechamente ligada a la estrategia de la organización"*	HRD function aligned with organizational strategy.
				"área de talento humano debe ser el aliado estratégico de la dirección"	Strategic ally for managers of the organization.
A5	M	54	22	*"desarrollo del recurso humano es un ejercicio de vida coherente y armónica, de vida socialmente responsable con el entorno y persona íntegra"*	Coherence and balance in life; developing social, economic, and environmental responsibility.
A6	M	44	>15	*"Yo entiendo el desarrollo de recursos humanos como todo el proceso mediante el cual una empresa genera valor en sus colaboradores a través de programas o a través de actividades que complementen los perfiles de sus colaboradores, o que fortalezcan habilidades particulares en temas específicos que requieran"*	Process, interventions, and activities that generate value in employees, enhancing job-related skills.

Table 3 Continued

Code	Gender	Age	Exp.	Definition of HRD (Spanish)	Key Components
A8	F	40	3	*"el desarrollo es que el recurso humano pueda formarse dentro de la organización, que le permita desarrollar su potencial, y ojalá tenga la posibilidad de alinearse y aprender dentro de la organización"*	Organizations are seen as a way for human development and learning; alignment between organizational and personal goals.
A9	F	50	>15	*"Desarrollo significa todas aquellas estrategias, intervenciones o actividades que genera avance o evolución en las personas"*	Strategies, activities, and interventions oriented towards the development and improvement of individuals.
B10	F	40	7	*"desarrollo de recursos humanos: integración de la rueda de la vida, o el plan de vida de la persona con el plan de la empresa, nosotros aquí lo sacamos mucho y hacemos alineaciones estratégicas"*	Strategic alignment and integration of personal and organizational plans.
B11	F	40	3	*"mirada sobre las habilidades humanas que permiten que las cosas se lleven a cabo en la organización"*	HRD focused on job-related skills.

In Table 3, I presented independent consultants' perspectives on human resource development, and highlighted key elements from their definitions. Based on these key elements, I conducted a word query (Figure 10) using NVivo software to identify words that were most frequently mentioned. The keywords identified were: alignment, organizational, development, human, job-related, skills, resources, improvement, HRD, interventions, strategic, and growth, among others. The following two perspectives on HRD practice in Colombia emerged after the analysis: (a) alignment between

91

organizational and individual development, and (b) personal growth and improvement of job-related skills. I elaborate on this piece in Chapter V in an attempt to present a contextualized definition of the HRD field in Colombia.

Figure 10. Key elements of HRD, as identified by independent HRD consultants in Colombia.

Research Question #1

Learning experiences that helped independent HRD consultants improve their practice and develop expertise in Colombia

As stated in Chapter III, a qualitative approach was adopted to facilitate reflective practice and explore the learning experiences of independent consultants. This information was gathered through interviews and self-reports. Based on Kolb's (1984) four-step experiential learning model, the self-report instrument (Table 4) was designed

allowing me to identify a variety of experiences that helped independent HRD

consultants improve their practice and develop expertise. In addition, the following

elements were considered to further explore experiences: incidents that influenced their

experience, detailed information about the situation and circumstances surrounding the

experience, and lessons learned.

Table 4 *Self-report and Associated Learning Steps Based on Kolb's Learning Model*

Day	Describe in detail the situation and circumstances of the experience (what, how, when, why). **(Concrete Exp.)**	What I have learned from this experience? **(Reflective Obs.)**	What does this experience mean to me? **(Abstract Con.)**	A strategy that really helped me was… **(Active Exp.)**	How was the situation solved? **(Active Exp.)**	How does this experience contribute to my personal and professional development? **(Reflection)**
1						
2						

Learning experiences were classified into three categories: (a) meaningful—

situation that changed drastically the way consultants work, (b) challenging—situation

posing a challenge never experienced, and (c) things that consultants would do

different—recommendations for other consultants. Because these categories vary among

participants, statements in relation to the research question, verbatim examples, and

descriptions of experiences were included to support the findings. For my study, all

experiences (i.e., independently if they were meaningful or challenging) were considered

as situations or circumstances that significantly changed the way independent

consultants worked, improved their practice, and developed expertise.

During the interviews, independent HRD consultants reported key incidents that influenced their practice. For instance, A9 reported one of the key factors influencing her experience as a consultant was the opportunity of being involved with CEOs and/or senior managers from the beginning of her career. This involvement helped her be more confident and forthright when writing consulting proposals, and she developed skills to understand managers' specific needs: "*el foguearme con equipos directivos me ha permitido ser muy concreta, directa, precisa y hábil para entenderles y asegurar que les he comprendido en su necesidad*". Moreover, A1 explained that assuming different roles at different levels and departments of an organization, was the key factor for him. A1 said, "*el haber interactuado en gran cantidad y diversidad de empresas y escenarios dentro de las estructuras de las empresas, niveles altos, medios y bajos, ha sido el factor determinante para ser un buen consultor*". He explained the knowledge gained by assuming diverse roles at different levels in an organization is a must for independent consultants. In that way, they have a holistic view about the organization. Additionally, A2 described that power issues with client organizations was a critical incident, changing the way he used to work as an independent consultant. A2 stated the challenge was to have clarity and to delimit the boundaries of each project, from its beginning ("*algunos clientes abusan de su posición de dominio y exigen muchísimo más allá de lo que han acordado pagar. El gran reto es tener claridad en la definición de los límites de los proyectos*"). In addition, A8 reported that learning how to be in control of her emotions and maintaining relationships were key factors influencing her practice; "*manejar tus emociones y el cuidado de tus relaciones, hacen parte de un juego del que*

siempre se debe tener mucho cuidado". She noted emotional intelligence skills were fundamental when negotiating with clients and when things don't go as planned.

Meaningful experiences. In terms of meaningful experiences, A4 shared that she conducted a massive organizational assessment in a multinational company based in Cali. A4 stated she submitted 127 reports in three days: *"tuve que entregar 127 informes, cuatro grupos, en 3 días"*. She reflected on similar experiences, adding that something needed to change *("tiene que haber algo más eficiente que esto". Entonces, ahí es donde empezamos a sistematizar")*. Based on these experiences, she realized she needed to be more efficient and effective; therefore, she started systematizing and standardizing processes to submit reports to clients' organizations.

One of the most meaningful experiences in A5's career happened during a workshop he facilitated with a group of senior executives. A5 clarified that he used to prefer mindfulness over dynamics or games as a method for training ("*solía privilegiar mindfulness, que es un ejercicio de respiración"),* especially if the training was oriented to senior executives. During the workshop, participants told A5 that although he was fun and enjoyable, they wanted more action *("el grupo me dijo: usted es muy ameno, usted es muy agradable, pero queremos es como más acción").* A5, instead of rejecting their feedback, opened his mind and listened, realizing that dynamics and/or games can be a valid method to transfer knowledge and develop skills with senior executives. Thus, shortly after this meaningful experience, A5 obtained certification in outdoor training, and is also a certified "LEGO® SERIOUS PLAY®" facilitator, strengthening his portfolio, and broadening his consulting services.

B11 is an independent consultant who provides philosophical consulting services to individuals and organizations. She shared that she was hired recently as a consultant to design and implement a series of workshops for an oil and gas company. The purpose of her services was to help employees accept the fact that the new CEO was a woman. Culturally, these companies are managed and directed by men. Thus, it was a drastic change for employees, and required an intervention to challenge and modify gender-based roles, beliefs, and perceptions within the company. B1 stated

> *...entonces ese proceso, por ejemplo, fue de comenzar a identificar cuál era el imaginario que había sobre la mujer. A partir de talleres que hice de narrativas, de sentarnos a que ellos hablaran de sus experiencias, de recoger apreciaciones que tenían, los juicios cotidianos. Yo, por ejemplo, me concentré mucho en pues cómo hablan, cuál es el tipo de lenguaje que utilizan, eso también dice mucho. Y ya después de eso entonces hicimos unos talleres en los que la idea era que se dieran cuenta que hablar de mujeres no era hablar solamente de seres humanos mujeres, sino que era hablar de la feminidad, y que la feminidad también estaba presente en los hombres.*

This experience was meaningful for B11 because of how it changed significantly her views on gender-based roles, and for the client organization. She highlighted that through implementation of narrative workshops, employees were able to modify their imagery about women. B11 also stated it was an open space to facilitate dialogue, share experiences, and identify personal judgments. Her focus as a philosophical consultant was to help employees change beliefs about machismo and feminism, which changed drastically the culture of the client organization ("*entonces eso fue un giro total!*").

Challenging experiences. A2 stated there were many challenging experiences

that helped improve his practice and develop expertise *("Pues yo te digo que no una, yo*

te diría varias las experiencias de este tipo las que nos han enseñado más"). He

emphasized the importance of delimiting boundaries of the consulting project, and clear

communication with his client organizations *("hemos aprendido que el principal o el*

común denominador ha sido no manejar correctamente la comunicación, no delimitar

los alcances con el cliente"). Hence, he standardized the contracting process with his

clients, including boundaries, deliverables, objectives, and expectations of the consulting

intervention. A similar experience happened for A8. Because of not delimiting

boundaries and not having a written proposal with the consulting service price, she lost a

close friend and her reputation was affected negatively. A8 stated

> *Como también, Laura, he tenido problemas, y he hecho malos negocios también.*
> *Entonces una vez me asocié con una persona que tenía una empresa de*
> *seguridad social y todo eso, y afiliamos una gente para un trabajo, y eso salió*
> *remal. O sea, perdí dinero, porque pues la persona decía que ella tenía que*
> *ganar por la seguridad social de ellos, y también por el prestar su empresa para*
> *la contratación. Entonces como de entrada por ganarnos el cliente, no*
> *organizamos muy bien la negociación, entonces hubo inconsistencias en los*
> *honorarios y yo perdí plata. Perdí mucho dinero, y perdí, de hecho, hasta un*
> *amigo y todo.*

From the beginning, the project was not well-organized and the price was agreed

upon verbally, A8 explained. She lost money and had to hire a lawyer to request the sued

party clear her name among colleagues and clients. This experience helped her realize

she needed to establish formal contracts with clients, including legal implications

between both parties, for future partnerships.

Other challenging experiences were influenced by variables such as the consultant's location. For example, when I interviewed A3, he was living in Bucaramanga, a small city in Colombia with an agricultural economic focus. Due to the characteristics of the city, opportunities for consulting are limited. He stated that he had called about 100 companies requesting meetings with the management to offer consulting services. Only four companies confirmed appointments, but he was not able to close any project *("llame a más o menos unas 100 empresas por teléfono buscando cita, me dieron cita cuatro")*. He added that Bucaramanga was a difficult city because he was unable to find a job or become hired as a consultant *("Bucaramanga para mí ha sido un espacio muy difícil, o sea yo no pude y no he podido encontrar trabajo como empleado acá en una empresa, ha sido-- O sea, yo no sé si los demás encuentran, pero yo no)*. However, this experience helped him recognize that conducting a market study of the area first, is the smart thing to determine viability of a consulting business.

Recommendations

The qualitative approach adopted in my study facilitated collection of numerous experiences, leading independent HRD consultants to reflect on things they would do differently in their practice, if they had the opportunity to go back in time. Table 5 summarizes participants' main ideas, which might provide recommendations to consider for other independent consultants and/or entrepreneurs in their consulting businesses.

Table 5 *Participants' Primary Ideas for Independent Consulting Businesses*

Code	Gender	Age	Exp.	City	Consulting Practice
A1	M	67	20	Bogota	• Get more involved with professional associations. • More international exposure: offer consulting services and get clients outside the country.
A2	M	42	20	Cali	• Charge higher honorariums. • Maintain the price of services even when companies ask for discounts.
A3	M	40	6	Bucaramanga	• Define and delimit consulting portfolio, including price based on type of services and/or intervention offered. • Build and maintain professional networks to access a broader market for the consulting business.
A4	F	52	>17	Cali	• Have a financial shareholder to invest in technology. • Establish marketing plan and define strategies to increase customer base.
A5	M	54	22	Cali	• If services are offered in the HRM & HRD fields: get involved in all areas of the HRM department, and at different levels of the organization. • Work for all types of organizations and in different sectors to have a better grasp of how companies function.
A6	M	44	>15	Bogota	• Delimit scope of interventions.
A8	F	40	3	Cali	• Be more intuitive and less emotional. • Set written contracts delimiting boundaries, implications, and price of the agreed services.
A9	F	50	>15	Cali	• Establish partnerships with foreign consulting firms.

Table 5 Continued

Code	Gender	Age	Exp.	City	Consulting Practice
B10	F	40	7	Bogota	• Obtain international certifications. • Permanent self-actualization. • Get more involved with professional associations to establish work alliances including consultants in other fields. • Attend research and professional conferences at least once per year.
B11	F	40	3	Bogota	• Be more aggressive commercially to attract and close more contracts. • Use social networks and virtual tools for marketing of the consulting business.

Research Question #2

Knowledge, skills, and attitudes are required to be an effective independent consultant in Colombia

Previously, I presented the main learning experiences that independent HRD consultants considered meaningful and challenging, helping them improve their practice and develop expertise. However, it's important to remember that experiences are only one of the components that a person must acquire to develop expertise. Independent HRD consultants reported self-perceived knowledge, skills, and attitudes (Table 6) required to be effective independent HRD consultants in Colombia. These categories are further discussed as follows.

Table 6 *KSAs Required for Effective Independent HRD Consultancy in Colombia*

Knowledge	Skills	Attitudes
Bachelor's degree	Negotiation	Strategic vision
Advance degrees and certifications	Interpersonal skills	Integrity
Field experience	Stress & time management	Challenging mind
Specializations	Bilingual	Service-oriented
On-the-job experience and training	Verbal & written communication	Perseverance
	Analytical & administrative skills	Self-confidence
	Leadership	Passion
	Creativity	Commitment
	Networking	

Knowledge

Overall, independent HRD consultants recommended that to become a subject

matter expert, independent consultants should: (a) complete formal educational

programs, (b) receive advanced professional degrees and certifications, and (c) gain field

experiences and on-the-job training. In addition, A6 stated that consultants must know

andragogy and methods for teaching adults ("*manejo de grupos y conocimientos de*

metodologias enfocadas precisamente a personas adultas"). A4 highlighted that it was

necessary for consultants to self-actualize constantly, not only about HRD or HRM, but

also in stratetigic planning, management, and finances.

> "…*tiene que tener una formación muy sólida y no solo conocimiento sino una*
> *actitud de actualización permanente. Debe conocer sobre gerencia, de*
> *planeación estratégica, finanzas, obviamente debe conocer muy a fondo lo que es*
> *la administración del talento humano con todo el ciclo de talento humano de*
> *comienzo a fin.*"

A9 explained that it is a must for independent consultants to have job-related

experience prior to becoming an independent consultant ("*Para ser un consultor hay que*

tener experiencia previa en el campo de trabajo). She also stated the experience and

knowledge gained working in different type of organizations and at different levels was

priceless (*El conocimiento que uno gana trabajando en varios tipos de organizaciones y*

en diferente niveles es invaluable).

Skills

In terms of skills, independent HRD consultants reported analytical thinking and

negotiation effectiveness were two of the most important skills that independent HRD

consultants must develop. Furthermore, A1 explained that ethnics and subcultures

played a role when working in consulting in Colombia; cultural awareness, interpersonal

relationships, and networking are key skills for consulting practice in Colombia. B10

noted that independent consultants needed to be aware about the cultural context of

where the company is located because doing business in Bogota is different from doing

business in the Caribbean region ("*hacer negocios en Bogotá es una cosa muy diferente*

a hacer negocios en la región caribe"). She also mentioned that networking is very

important for consulting practice. The key is to be part of professional associations and

attend conferences. Six out of the ten interviewees stressed the importance of being

proficient in a second language. For example, A2 and A9 mentioned that other than

English, consultants must develop technological skills to stay competitive in the

consulting field ("*hoy en día, tecnología está involucrada en todo aspecto de la*

consultoría: desde el mercadeo del negocio hasta el reporte de resultados. Se necesita

de la tecnología para mantenerse competitivos en el mercado").

Attitudes

Attitudinally, being open-minded throughout the development of the consulting career, and being optimistic especially during challenging times, are very important attributes for independent HRD consultants. As well, passion, perseverance, and a service-oriented mindset were highlighted during interviews as fundamental attitudes to "survive" in the consulting field. For instance, B11 explained that she thought about quitting many times; however, if it was not for her passion about philosophical consulting, she would've "dropped the ball" ("*Muchas veces he pensado en renunciar y solar la pelota. Pero me encanta lo que hago y no voy a renunciar a mi sueño profesional*"). Creativity and commitment were reported also as valuable attitudes, especially when independent consultants are starting their consulting businesses. Both A5 and A3 explained that having a creative attitude helps independent consultants generate original ideas, especially when defining consulting portfolios, writing proposals, and designing consulting interventions.

Findings of the second research question proposed, provided insight into the knowledge, skills, and attitudes that independent HRD consultants should have, providing a qualification framework for assessing and certifying the development and improvement of independent HRD consultants' skills in Colombia.

Research Question #3

Profile of independent HRD consultants and features of the consulting business.

Findings of the last research question proposed in this exploratory study are presented around two categories: (a) profile of independent consultants, and (b) features and process of the consulting business.

Profile of Independent HRD Consultants

Profile of independent HRD consultants including age, years of experience, and educational background are shown in Table 7. Watkins' (1989) five philosophical metaphors and Block's (2011) three proposed ways consultants chose to work with client organizations, served as a guiding framework to classify consultants' roles and styles of engaging with organizations. It is important to note this is a personal classification based on narratives and information gathered from my research participants. I conclude this section with the main features of the consulting business, including consulting processes followed, services and portfolio, and types of client organizations.

Table 7 *Profile of Independent HRD Consultants*

Code	Gender	Age	Exp	City	Education	Consultants' Role	Style
A1	M	67	20	Bogota	BS: Veterinary Medicine Certifications: Business and commercial specialized studies, HRM, competencies model, and change management.	Organizational empowerer/meaning maker	Collaborative
A2	M	42	20	Cali	BS: Economy MS: Business Administration	Organizational designer	Expert
A3	M	40	6	Bucara-manga	BS: Industrial Engineer MS: Logistics Management specialization	Organizational designer	Expert
A4	F	52	>17	Cali	BS: Psychology Specialization: Gestalt Therapy, HRM, competencies model, Career Counselor.	Developer of human capital	Collaborative
A5	M	54	22	Cali	BS: Psychology MS: Administration Certifications: Strategic Management & Leadership, LEGO® SERIOUS PLAY®, Outdoor Training	Organizational empowerer/meaning maker	Collaborative

Table 7 Continued

Code	Gender	Age	Exp	City	Education	Consultants' Role	Style
A6	M	44	>15	Bogota	Specialized Studies: Zootechnics Specialization in health and safety at work	Organizational problem solver	Expert
A8	F	40	3	Cali	BS: Psychology Certification: Executive Coaching (Level I)	Developer of human capital	Collaborative
A9	F	50	>15	Cali	BS: Psychology & Job Developer (Canada) Specialization: Industrial Relations Certification: Executive Coaching	Organizational change agent/interventionist or helper	Collaborative
B10	F	40	7	Bogota	BS: Graphic Designer Specialization: Organizational Communications Certifications: PNL, Strategic Management	Organizational empowerer/meaning maker	Collaborative
B11	F	40	3	Bogota	BS: Anthropology MS: Philosophy PhD: Philosophy Certification: Philosophical Practice	Organizational empowerer/meaning maker	Collaborative

Ten (full-time) independent HRD consultants participated in this exploratory study. When interviews were conducted, four consultants were located in Bogota, five in Cali, and one in Bucaramanga. Age of independent HRD consultants ranged between 40 and 67 years. All consultants had bachelors' degrees, four had masters', and one had a PhD. Among certifications that independent consultants might possess are strategic management, executive coaching, human resource management, and competencies model.

Independent consultants were classified as organizational problem solver, if the focus of his/her consulting services was oriented towards the design of instructional programs responding to organizationally-defined problems. Likewise, if a consultant was classified as an organizational change agent/interventionist or helper, the main focus of services should be helping or assisting people and organizations through change. The main characteristics for selecting consultants as organizational designers were diagnosing and selecting the structure, and forming a system of communication, authority, and responsibility to achieve organizational goals. The main focus of an organizational empowerer/meaning maker is transforming people and organizations to foster long-term health and effectiveness. And, the developer of human capital should direct his/her consulting interventions towards assisting and giving opportunities for training, expected turnover, age of retirement, and promotability.

In terms of the three ways consultants engage or work with client organizations, the criteria used to classify consultants was described as: (a) expert - the consultant becomes the expert in the performance of a given task; (b) pair-of-hands - it's expected

from consultants to apply specialized knowledge to implement action plans toward the

achievement of goals defined by management; and (c) collaborative - management

issues can be addressed effectively only by joining his/her specialized knowledge with

the manager's knowledge of the organization.

Features and process of the consulting business

Table 8 highlights features of independent HRD consultants' businesses,

including profile of the consulting business, areas of services, and types of client

organizations. This information is presented to provide an overview of the characteristics

of the consulting organization.

Table 8 *Features of the Consulting Business*

Code	Gender	Age	Exp.	City	Profile of Consulting Business	Service Areas	Type[a]
A1	M	67	20	Bogota	Human Resources and Management Consulting firm with expertise in Strategy & Planning, Human Capital Management. Provides teams and organizations with the experience-based, open-path, and purpose-driven learning that's essential to fueling self-driving organizations.	Strategic Management, Coaching, and Human Resource Management	SM
A2	M	42	20	Cali	Innovative company, focused on the achievement of high impact results, which actively works in the development of its four main axes.	RRHH 2.0, High Impact Learning Unit, Project Management System, Creative Consulting	SML

Table 8 Continued

Code	Gender	Age	Exp.	City	Profile of Consulting Business	Service Areas	Type[a]
A3	M	40	6	Bucaramanga	Maintain profitability and a competitive advantage through business process reengineering initiatives resulting in more efficient and effective operations, with an improved bottom line and balance sheet.	Organizational reengineering, BSC, Organizational efficiency	ML
A4	F	52	>17	Cali	Consulting specialized in guiding people in the transition phases to find their purpose in life through services of School Guidance, Professional Guidance and Career Planning. At the business level, it supports organizations with services for the selection, development, evaluation and training of their human talent.	Career Development (Diagnosis and orientation of the professional profile in young people and adults) & Human Resource Management	SLMu
A5	M	54	22	Cali	Help leaders, teams, and organizations succeed through leadership, communication, change, culture, organizational effectiveness, talent management, and employee engagement interventions.	Team building and Management Skills / Executive Coaching	ML
A6	M	44	>15	Bogota	Provides comprehensive Occupational Health, Safety, and Environment (HSE) and Industrial Hygiene services helping develop or improve safety and health programs that meet and exceed local and national requirements.	Emergency, security and health administration (HSE). Emergency care and administration.	M

Table 8 Continued

Code	Gender	Age	Exp.	City	Profile of Consulting Business	Service Areas	Type[a]
A8	F	40	3	Cali	Provider of human resource solutions designed to enhance the employee experience. Help companies in attracting, hiring and keeping the right people. Services include employer branding, recruiting operations consulting, and employee engagement.	Human Resource Management	ML
A9	F	50	>15	Cali	Provides customized learning interventions to organizations so change efforts can be achieved and performance improvements can be measured. Strategic ally to help realize strategic business goals through innovative and integrated approaches to learning, and continuous improvement of business processes.	Strategic Management and Human Resource Management	ML
B10	F	40	7	Bogota	Human Resources and Management Consulting firm with expertise in Strategy & Planning, Human Capital Management, and Project Management. Provides teams and organizations with the experience-based, open-path, and purpose-driven learning that's essential to fueling self-driving organizations.	Strategic Management and Human Resource Management	MiSM
B11	F	40	3	Bogota	Help individuals, teams, and organizations to revitalize the human experience through philosophical practice.	Philosophical Consulting for individuals and organizations	SML

Note. [a] S = Small, M = Medium, L = Large, Mi = Micro, Mu = Multinational.

Consulting process

All participants reported the best strategy for finding clients was through referrals. These were from relatives, friends, previous co-workers, and others that recommended independent consultants' services to the companies where they worked. Social and professional networks such as LinkedIn, are becoming very effective ways to showcase their consulting businesses, build networks, and acquire connections. Overall, independent HRD consultants follow the consulting process as:

1. Entry and contracting: All consultants reported this was a very important step in consulting because it was the moment where they gathered data about the needs of the client organization. A1 and B10 stated that in this phase, consultants have the opportunity to delimit the boundaries of the project, based on realistic expectations from both parties ("*Esta es la mejor oportunidad para clarificar que es exactamente lo que el cliente necesita*"). A5 reported that too often, consultants understate clients' wants, and clients understate consultants' offers. Therefore, consultants tried to be very clear and "express joined expectations" ("*expresar expectativas conjuntas*").

2. Assessment: independent consultants reported tools used to assess organizations were balance scorecard, benchmarking, Porter's five forces, SWOT analysis, and core competencies analysis. A1, B10, A5, and A9 mentioned they had developed their own tools for organizational assessment, based on these primary tools. A1, A8, A9, B10 shared they also spent hours gathering data from employees of the organization. They reviewed manuals, procedures, and job descriptions to gain a

better picture of the company. However, A9 and A5 stated they had long-lasting relationships with some of their clients, and therefore implemented other tools (e.g., DISC, 360 appraisal) to assess other aspects of the organization, such as performance or culture.

3. Planning: considered a critical phase because it's where consultants provide feedback about their findings and there is resistance to the data. A2 said, "*la etapa de planeación es crítica pues los gerentes están esperando oír lo que encontramos. Muchas veces hay resistencia a recibir ese feedback*". B11 reported that even though data collected after the assessment is anonymous, employees were resistant to provide feedback about managers and supervisors' leadership styles ("*Por más que uno informa que la entrevista o el cuestionario son anónimos, se puede percibir la Resistencia de los empleados para hablar de los jefes*"). This is an important phase because consultants and client organization decide the appropriate intervention based on collected data.

4. Engagement and implementation: independent HRD consultants suggested that before implementing any intervention, consultants needed to be sure that employees were engaged with the project. A9 explained that employees' involvement determined the level of commitment at each stage of implementation ("*es importantísimo ganarse a los empleados de la organización antes de empezar cualquier intervención. Hay que garantizar el buy-in para que todo funcione*"). Consultants reported that it's important to be flexible and evaluate the effectiveness of the intervention at each step, making modifications

112

as needed to guarantee proposed goals. The most used HRD interventions that independent consultants implemented were T&D, coaching, 360-degree feedback, job design and job descriptions, team building, process improvement, Total Quality Management, benchmarking, strategic planning, and balanced scorecard.

5. Extension, evaluation, or termination/separation: independent consultants reported this phase normally encompassed: evaluation of implementation, presentation of results and final report, settling commitments and plans for follow-up, and in some cases, withdrawal. Consultants stated they had at least one client organization with whom they had ongoing contracts and long-lasting relationships. A5 reported that when things went well with his clients, they continued calling him for futures projects. Likewise, A11 said this was a good strategy to guarantee a monthly income because unfortunately, opportunities for consulting between November and February are not the best ("*las compañías dejan de contratar consultores a partir de noviembre y hasta febrero cuando resumen actividades después de navidad y tienen presupuesto*").

Summary

In Chapter IV, I presented the findings of my study including statements in relation to the research questions, verbatim examples, and descriptions of the experience. First, to contextualize HRD interventions in Colombia, I presented independent consultants' perspective on human resource development, and highlighted key components from their definition. Then, main learning experiences that independent HRD consultants considered as meaningful and challenging helping them improve their practice and develop expertise, were reported. Furthermore, I described the knowledge, skills, and attitudes that independent HRD consultants reported as required to be an effective consultant in this country. Finally, I conclude this chapter highlighting main features of independent HRD consultants' business, and a description of the overall consulting process followed by research participants.

CHAPTER V

DISCUSSION AND CONCLUSIONS

In this concluding Chapter, I discuss the results of my study based on the frame of reference proposed. Implications for research and practice, suggestions for future research, and limitations of the study also are discussed in this section.

The research questions that guided this study were:

1. What are the learning experiences that helped independent HRD consultants improve their practice and develop expertise in Colombia?

2. What are the knowledge, skills, and attitudes required to be an effective independent HRD consultant?

3. What is the profile of independent HRD consultants, and features of the consulting business?

Summary of the Findings

Findings of my study were presented based on the three research questions proposed. A qualitative approach was adopted to facilitate reflective practice and explore the learning experiences of independent HRD consultants. This information was gathered through interviews and self-reports. To contextualize HRD interventions in Colombia, I presented independent consultants' perspectives on human resource development, and highlighted key components from their definitions. Learning experiences were classified in three categories: (a) meaningful, (b) challenging, and (c) things that consultants would do different. For the purpose of my study, all experiences

(independently, if they were meaningful or challenging) were considered as situations or circumstances that significantly changed the way in which independent consultants worked to improve their practice and develop expertise.

In Chapter IV, I described the knowledge, skills, and attitudes that independent HRD consultants reported as being required to be an effective consultant in Colombia. Overall, research participants suggested that to become a subject matter expert, independent consultants should: (a) complete formal educational programs, (b) receive advanced professional degrees and certifications, and (c) gain field experiences and on-the-job training. In terms of skills, consultants reported that analytical thinking and negotiation effectiveness were two of the most important skills to develop. In addition, some stated that ethnicities and subcultures play a role when consulting in Colombia, highlighting cultural awareness, interpersonal relationships, and networking as key skills for the HRD consulting practice. Six of the ten interviewees stressed the importance of being proficient in a second language, and a need to develop technological skills to stay competitive in the consulting field. Moreover, being open-minded throughout development of one's consulting career, and optimistic, especially during challenging times, were very important attitudes for independent HRD consultants. In addition, passion, perseverance, and a service-oriented mindset were highlighted during interviews as fundamental attitudes to "survive" in the consulting field.

I concluded Chapter IV highlighting main features of independent HRD consultants' businesses, and a description of the overall consulting process by research participants. Ten (full-time) independent HRD consultants participated in this

exploratory study. When interviews were conducted, four consultants were located in Bogota, five in Cali, and one in Bucaramanga. Age of independent HRD consultants ranged between 40 and 67 years. All consultants had bachelors' degrees, four had masters' degrees, and one had a doctoral degree. Among the certifications that independent consultants possessed were strategic management, executive coaching, human resource management, and competencies model. All participants reported that the best strategy for findings clients was through referrals. Social and professional networks such as LinkedIn, are becoming a very effective way to showcase their consulting businesses, build networks, and get connections.

In terms of the consulting process followed, independent consultants reported that entry and contracting was a very important phase because it's the moment when they gathered data about the needs of the client organization. In addition, consultants had opportunities to delimit the boundaries of their projects, based on realistic expectations from both parties during this stage. Among the tools that independent consultants used to assess organizations were the balanced scorecard, benchmarking, Porter's five forces, SWOT analysis, and core competencies analysis. Four consultants mentioned they had developed their own tools for organizational assessment based on the previous tools mentioned. They also spent hours gathering data from employees' views of the organization, and reviewed manuals, procedures, and job descriptions to gain a better picture of the company. Further, planning was an important phase of the consulting process because consultants and their clients jointly decided the appropriate intervention, based on collected data. The most used HRD interventions were: T&D, coaching, 360-

117

degree feedback, job design and job descriptions, team building, process improvement, Total Quality Management, benchmarking, strategic planning, and balanced scorecard. Finally, independent HRD consultants reported activities in the last phase of the consulting process included evaluation of implementation, presentation of results and final report, settling commitments and plans for follow-up, and withdrawal in the majority of the cases.

Discussion

My goal in this section is to discuss and explain the results of the research questions proposed and elaborate on how results of this exploratory study support, contradict, or extend the knowledge base in the field. In addition, main perspectives that independent consultants highlighted for HRD practice in Colombia are described. Findings of the three research questions are based on the theoretical and conceptual frameworks of the study.

Perspectives on HRD Practice in Colombia

In chapter IV, I presented key components of what HRD interventions entail from independent HRD consultants' perspectives. The following two perspectives on HRD practice in Colombia emerged after the analysis: (a) alignment between organizational and individual development, and (b) personal growth and improvement of job-related skills.

Under the first perspective, independent consultants placed high importance on strategic alignment of organizational and individual development. The word strategic emphasizes the organizational perspective, making a link between HRD, and

organizational goals and objectives (Wognum & Fond Lam, 2000). Robinson and

Robinson (2005) argued that the mission of this strategic alignment is to implement

development interventions that enhance employee performance and lead to business

results. Hence, this perspective can be approached from both the learning and

performance paradigms of HRD. Within the learning paradigm, it is possible to identify

three streams (i.e., individual, performance-based, and whole systems learning) focused

on individual learning as an outcome, and the individual learner as the target of HRD

interventions. On the other hand, the performance paradigm is focused on individual and

whole systems performance improvement. Through learning and non-learning

interventions at multiple levels, the aim of this perspective is to enhance both individual

and systems performance in the organization. Thus, independent HRD consultants' goals

under this perspective were to design interventions to enhance both individuals and

companies, building systems to support learning at all levels of the organization.

The second perspective is personal growth and improvement of job-related skills.

Under this viewpoint, independent consultants highlighted T&D as core HRD practice in

Colombia. This finding is supported by empirical studies in Colombia (Calderon,

Naranjo & Alvarez, 2007, 2010; Orrego, 2015; Saldarriaga, 2008). Training plays a key

role in achievement of organizational goals by facilitating the development and

improvement of job-related skills in its workforce. Since organizations learn and

improve through human expertise, T&D has an effect on individuals' knowledge, skills,

and attitudes to improve individual, team, and organizational effectiveness. Its ultimate

goal is the transferability of knowledge to develop job-related competencies and

expertise. Findings suggested that independent consultants saw themselves as strategic allies of management in client organizations. They perceived companies as a mean for human development and learning, highlighting two dimensions of human resources: productive and social. In addition, research participants stressed the importance of linking both productive and social human resources, encouraging the development of individuals from both human and economic perspectives.

Based on HRD definitions proposed by McGuire and Jorgensen (2011), McLean and McLean (2001), and Swanson (1999), I identified three major similarities in the abovementioned perspectives supporting existing HRD literature. First, independent consultants and HRD theorists identified growth of individuals and development of organizations as outcomes of HRD practice. Second, learning and performance are distinguished as HRD leading paradigms (Swanson & Holton, 2009). And third, T&D is recognized as the largest realm of HRD activity (Swanson & Holton, 2009). As researcher, I recognize that gathering perspectives from ten independent HRD consultants does not represent an entire population or a final contextualization of HRD practices in Colombia. However, collecting this information helped me delimit consultants' practices, and support HRD theory.

Research Question #1 – Learning Theory

My interest in exploring experiences of independent HRD consultants evolved from the curiosity of knowing what others have experienced in the field, to the point of having the need to constantly reflect on my own practice. Reflective practice was assumed in this study, as an integrated approach of the qualitative design adopted, to facilitate independent HRD consultants' reflections on their practice. In the literature, it has been defined as a "deliberated pause to assume an open perspective, to allow for higher level thinking processes, examining beliefs, goals, and practices, to gain new or deeper understanding that lead to actions that improve learning" (York-Barr et al., 2001, p. 6). However, facilitating this process requires far more than asking research participants to reflect upon, and then simply hoping for the best. It requires the ability to reflect on actions and engage in a process of continuous learning, involving critical attention to everyday activities by examining practice thoughtfully and reflexively.

Both interviews and self-reports were valuable instruments to gather the numerous experiences that independent HRD consultants shared with me. Interviews became storytelling sessions about how they developed expertise throughout the years, and how consultants improved their practices to position their businesses in Colombia. Self-reports in particular, were helpful to facilitate the reflection process. However, after analysis of the data, I identified a limitation of the instrument.

Kolb (1984) proposed in his four-step experiential learning model that active experimentation requires decision-making and problem-solving skills. Although independent consultants responded to questions about strategies and how the situation

was solved, I found myself limited in determining independent consultants' levels of decision-making and problem-solving skills. This limitation is extended to the second research question proposed. Problem-solving heuristics are described as "the key to expertise" (Swanson & Holton, 2009, p. 263), and relates to the ability and/or approach to solve problems. Bereiter and Scardamalia (1993) emphasized that problem-solving is a dynamic element in the development of expertise, and perceived experts as continuous problem-solvers. Thus, I assumed that based on years of experience, independent HRD consultants developed decision-making and problem-solving skills at a high level. I admit that an assessment center exercise or a case study could be appropriate methods to gaining more accurate perspective of independent HRD consultants' skills.

All experiences, independently if they were meaningful or challenging, were considered as situations or circumstances that significantly changed the way independent consultants worked, improved their practice, and developed expertise. Research participants came from different cities, backgrounds, and stages of consulting business. Exploring experiences of independent HRD consultants gave me a better understanding of my own professional experience, and the impact of sharing these with others, through reflective practice. They expressed how significant it was for them to reflect on past practices. For example, A4 stated that no one before had asked about circumstances that helped her improve the way she used to work. A4 also stressed how helpful it would have been to learn from other colleagues about their experiences in the field. This statement made me think that focus groups could have enhanced my study, creating a space for group reflection on professional practices.

Research Question #2 – Expertise

In this study, expertise was conceptualized as "the optimal level at which a person is able to perform within a specialized realm of activity" (Swanson, 2007, p. 125). Commonly shared principles of expertise included: (a) it is dynamic; (b) domain specific; and (c) the components of expertise are knowledge and associate skills, experience, and problem-solving heuristics. The dynamic state of expertise suggests a process of continuous learning, characterized by the constant acquisition of knowledge and permanently solving problems. This outcome is supported by independent HRD consultants who considered it necessary for other consultants to self-actualize constantly, not only on the field of expertise, but in other areas. Findings of the study supported the second principle proposed, in that independent HRD consultants highlighted specialized knowledge and skills were necessary to master the consulting practice. Mastery is possible through permanent actualization, training, and domain specific experience. Intellectual property is part of consultants' knowledge. If they want to survive in the consulting market, independent HRD consultants need to re-think, re-create and continue re-visiting the depth of that space as the market and clients, and demand for consulting change.

Results of this exploratory study provide insight into the skills and abilities that independent HRD consultants should have, providing a qualification framework for assessing and certifying the development and improvement of independent HRD consultants' skills in Colombia. It is expected that this framework is in the interest of independent HRD consultants, organizations, and educational institutions in Colombia,

as it facilitates the design of learning interventions, and guides individuals in their choices of training and career. This framework provides professionals who are starting a consulting business with a benchmark and the device for enhancing relevant knowledge and skills. For educational institutions, findings of the study can guide course content, which prepares students with updated knowledge and skills necessary to meet the performance requirements in the consulting market. And, companies can provide ongoing professional development to their HRD practitioners to facilitate continuous learning.

Research Question #3 – Consulting Principles and Theory

Overall, I identified from independent HRD consultants a clear business vision and expertise, which strengthens their client organizations through strategic solutions. In this way, independent HRD consultants have positioned their consulting businesses by implementing strategic and contextualized solutions that have an effective impact on their clients. As competition intensifies with entry of different professionals in the HRD consulting market, there is a need for independent HRD consultants to define their unique identities and differentiate themselves from the rest of the field. The traditional consulting partnership form needs to be revisited considering the increasing globalization of consulting firms and clients. Revisiting the traditional consulting partnership implies a need to adopt flexible organizational forms and roles that best suit national and local contexts, and cultural identities.

Considering the profile of independent HRD consultants, it is important to note it was a personal classification based on information gathered from research participants. I

classified consultants' styles based on Block's (2011) three proposed ways in which consultants chose to work with client organizations. Three independent consultants were identified as experts, becoming the most knowledgeable in the performance of a given task. Seven independent HRD consultants were identified as collaborative, joining specialized knowledge with the manager's knowledge of the organization.

Based on Watkins' (1989) five philosophical metaphors, A6 was classified as organizational problem solver, because the focus of his consulting services was oriented towards the design of instructional programs responding to organizationally-defined problems. A9 was classified as an organizational change agent/interventionist or helper, because the focus of her services was in assisting people and organizations through change. A2 and A3 were identified as organizational designers, diagnosing and selecting the structure, and forming a system of communication, and responsibilities to achieve organizational goals. A1, A5, B10, and B11 were classified as organizational empowerer/meaning makers, transforming people and organizations to foster long-term health and effectiveness. Finally, A4 and A8 were considered as developers of human capital, directing their consulting interventions towards assisting and giving opportunities for training, expected turnover, age of retirement, and promotability.

I perceived a link between the ways consultants chose to work with their client organizations, and their assumed roles. For example, two independent HRD consultants identified as organizational designers (A2 and A3), and the organizational problem solver (A6) were classified as experts. From my perspective, these consultants needed to assume this role to facilitate interventions that responded to organizationally-defined

problems, and for diagnosing and selecting the structure to achieve organizational goals. Other independent consultants assuming roles such as organizational empowerer/meaning maker or organizational change agent/interventionist, needed to establish collaborative relationships and gain buy-in within their client organizations to assist them through change, and to transform people and organizations to foster long-term health and effectiveness.

Implications, Recommendations, and Limitations

This dissertation focused on three areas of research and practice within the HRD field. The first area was considered as the theoretical framework of the study and examined learning theory. Specifically, Kolb's (1984) experiential learning model and reflective practice approach facilitated the exploration of learning experiences that helped independent HRD consultants improve their practice and develop expertise. The conceptual framework was comprised of the second and third areas of research and practice. Expertise and consulting principles and theory allowed me to elaborate on the qualifications framework proposed, and the profile of independent HRD consultants and features of the consulting business. Implications for practice, recommendations for future research, and limitations of the study are presented in this section, based on these three areas.

Although reflective practice noted in the literature as an essential attribute for professional development (Schön, 1983), no literature could be found wherein Colombians focused on reflective practice as a method to facilitate reflective learning in the consulting field. Learning from experience highlights the importance of reflection.

126

Reflective practice in particular is key for professional development and continuous learning, benefiting independent HRD consultants with opportunities to reflect and identify strategies to constantly improve their practice and develop expertise. Benefits of this practice can be extended to client organizations, designing interventions to help individuals and companies engage in reflective activities that lead to action and continuous learning. In addition, collective reflective practice can foster collaborative relationships as independent HRD consultants learn new perspectives and insights from each other, strengthening networks and building communities of practice. Hopefully, this study encourages independent consultants in the HRD field to work and reflect collaboratively.

With the increasing number of independent consultants in Colombia, there exists a need to expand current literature on the independent HRD consulting field. Therefore, findings from this exploratory study contribute to the emerging literature and the characterization of consulting practices in Colombia, by providing a framework about the: (a) consulting business, process, and services, (b) profile of independent consultants, and (c) knowledge, skills, and attitudes required to be an effective consultant. The qualification framework presented in this study encourages broader debate on independent HRD consultants' knowledge and skills. It provided a holistic perspective for assessing and certifying the development of independent HRD consultants' knowledge and skills. Additionally, it provides the basis for the design of curriculum, defining important competencies for the HRD consulting field. For example, educational

institutions can use findings of the study to identify gaps and evaluate curriculum, allowing individuals to assess their personal learning needs.

Because there is no clear distinction between HRD and HRM practices in Colombia, it is important to expand current knowledge in terms of HRD consulting practices in this context. Thus, findings of this exploratory study provided two perspectives and identified three major similarities that support existing HRD literature in the United States. As researcher, I recognize that gathering perspectives from 10 independent HRD consultants does not represent an entire population or a final contextualization of HRD practices in Colombia. However, collecting this information helped delimit consultants' practices, and suggests a continued revision of the HRD field in other contexts outside the United States.

Throughout this exploratory study, a variety of areas for future research were identified. In terms of research design, future research should employ a phenomenological approach to explore the lived experiences of independent HRD consultants. Under this approach, researchers may study multiple perceptions of the phenomenon, as experienced by different independent HRD consultants, to determine what commonalities among perceptions and experiences. Another option for future research is in using case studies to analyze independent HRD consultants' career development. Future studies could explore variables influencing the decision of becoming an independent consultant, professional and educational paths, and assess the competencies needed for successful careers.

Additionally, another recommendation is for increased assessment of independent HRD consultants' skills. Specifically, those skills considered as key components of expertise (i.e., decision-making and problem-solving heuristics). Based on the qualifications framework proposed, extended research and assessment could determine (a) skills associated with the consulting process, and (b) transferable skills learned throughout professional experience that could be employed in different settings. For example, leadership, problem solving, motivation, time management, and verbal and written communication may be such skills.

Additional research is needed to explore further links between how consultants chose to work with clients and the roles they assume, to propose contextualized roles based on Colombia's specific characteristics. Future research could contribute in the conceptualization of HRD, involving researchers, practitioners, and professional associations that could elaborate on differences and overlapping areas between HRD and HRM in Colombia.

In addition to the number of participants in the study, there are limitations on the significance of reflective practice to the professional development of independent HRD consultants. As stated in the discussion, focus groups could have enhanced the experience, facilitating group development and learning, and building networks.

A limitation on the self-report instrument was identified. Although independent consultants responded to questions about strategies and how problematic situations were solved, I was limited in determining their levels of decision-making and problem-solving

skills. Thus, I assumed that based on years of experience, independent HRD consultants developed decision-making and problem-solving skills at a high level.

Reflecting on my own position in this qualitative exploratory study, I am aware there was the possibility of biased interpretations and/or classifications. As a researcher, I recognize that gathering perspectives from ten independent HRD consultants do not represent an entire population, and therefore, a final contextualization of HRD practices in Colombia can't be presented in this study.

REFERENCES

Aguinis, H., & Kraiger, K. (2009). Benefits of training and development for individuals and teams, organizations, and society. *Annual Review of Psychology, 60*, 451-474.

Barcus, S., & Wilkinson, J. (1995). *Handbook of management consulting services* (2nd ed.). New York: McGraw-Hill.

Baumgartner, L. M. (2003). Self-directed learning: A goal, process, and personal attribute. *Adult Learning Theory: A Primer*, 23-28.

BBC News. (2015). *Colombia country profile-Overview*. Retrieved from http://www.bbc.com/news/world-latin-america-19390026

Bereiter, C., & Scardamalia, M. (1993). *Surpassing ourselves: An inquiry into the nature and implications of expertise.* Chicago: Open Court.

Bernal, S. (2009). The informal labor market in Colombia: Identification and characterization. *Desarrollo y Sociedad, 63*, 145-208.

Bierema, L., & Callahan, J. L. (2014). Transforming HRD: A framework for critical HRD practice. *Advances in Developing Human Resources, 16*(4), 429-444.

Block, P. (2011). *Flawless consulting: A guide to getting your expertise used.* San Francisco, CA: Jossey-Bass.

Boxall, P., Purcell, J., & Wright, P. (2009). *Human resource management: Scope, analysis, and significance*. Oxford Handbooks Online. Retrieved from

http://www.oxfordhandbooks.com/view/10.1093/oxfordhb/9780199547029.001.

0001/oxfordhb-9780199547029-e-1

Brunner, J. J., Gacel-Avila, J., Laverde, M., Puukka, J., Rubio, J., Schwartzman, S., et al.

(2012). *Higher education in regional and city development*. Antioquia,

Colombia. Paris: OECD Publishing.

Cajiao-Wingenbach, L., & Wang, J. (2016, February). What do we know about NHRD

in Colombia: A scoping review. Paper presented at the AHRD International

Research Conference in the Americas, Jacksonville, FL.

Calderón, G., Naranjo, J. C., & Álvarez, C. M. (2007). La gestión humana en Colombia:

Características y tendencias de la práctica y de la investigación. *Estudios

Gerenciales*, *23*(103), 39-64.

Calderón, G., Naranjo, J. C., & Álvarez, C. M. (2010). Gestión humana en la empresa

colombiana: Sus características, retos y aportes. Una aproximación a un sistema

integral. *Cuadernos de Administración*, *23*(41), 13-36.

Chalofsky, N. (2007). The seminal foundation of the discipline of HRD: People,

learning, and organizations. *Human Resource Development Quarterly, 18*, 431-

442.

Consejo Privado de Competitividad. (2016). *Informe Nacional de Competitividad 2016-

2017*. Bogotá D.C.: Consejo Privado de Competitividad.

Cooperrider, D., & Srivastva, S. (1987). Appreciative inquiry in organizational life. In R.

Woodman & W. Pasmore (Eds.), *Organizational change and development: Vol.

1* (pp. 129-170). Greenwich, CT: JAI Press.

Creswell, J. W. (2013). *Qualitative inquiry and research design: Choosing among five approaches* (3rd ed.). Thousand Oaks, CA: Sage.

Creswell, J., & Miller, D. L. (2000). Determining validity in qualitative inquiry. *Theory into Practice, 39,* 124-130.

Criticos, C. (1993). Experiential learning and social transformation for a post-apartheid learning future. In D. Boud, R. Cohen, & D. Walker (Eds.), *Using experience for learning* (pp. 157-168). Buckingham, England, and Bristol, PA: Society for Research into Higher Education and Open University Press.

Cummings, T. & Worley, C. (2001). *Organization development and change.* (7th ed.) St Paul, MN: West Publishing.

Dattalo, P. (2008). *Determining sample size: Balancing power, precision, and practicality*. NY: Oxford University Press.

Dawis, R. V. (1996). The theory of work adjustment and person-environment-correspondence counseling. *Career Choice and Development*, *3*, 75-120.

De Jong, J. A., & Van Eekelen, I. M. (1999). Management consultants: What do they do? *Leadership & Organization Development Journal, 20*(4), 181-188.

Denzin, N. K., & Lincoln, Y. S. (1994). *Handbook of qualitative research*. Thousand Oaks, CA: Sage.

Departamento Administrativo Nacional de Estadística (DANE). (2015). Retrieved from http://www.dane.gov.co/index.php/eng/

Departamento Administrativo Nacional de Estadística (DANE). (2016). Retrieved from http://www.dane.gov.co/index.php/eng/

Dewey, J. (1938). *Experience and education.* New York: Collier Books.

Egan, T. M., Upton, M. G., & Lynham, S. A. (2006). Career development: Load-bearing wall or window dressing? Exploring definitions, theories, and prospects for HRD-related theory building. *Human Resource Development Review, 5*(4), 442-477.

Erlandson, D. A. (2002). *Doing naturalistic inquiry: A guide to methods*. Newbury Park: Sage.

Fenwick, T. (2003). *Learning through experience: Troubling orthodoxies and intersecting questions.* Malabar, FL: Krieger.

Fenwick, T. (2004). Toward a critical HRD in theory and practice. *Adult Education Quarterly, 54*(3), 193-209.

Fraenkel, J. R., & Wallen, N. E. (2009). *How to design and evaluate research in education* (7th ed.). NY: McGraw-Hill.

Fulkerson, J. R. (2012). Organizational consulting in international contexts: An integrative perspective. *Consulting Psychology Journal: Practice and Research, 64*(4), 325-337.

Gleespen, A. V. (1996). How individual expertise may be socially constructed: A literature review. In *1996 AHRD Conference Proceedings,* (pp. 497-504).

Gomez, D. & Munera, J. I. (1998). El mundo de la consultoria empresarial. *Teconologia Administrativa, 28*(12), 13-39.

González, J. J., Rodríguez, M. T., & Duarte, L. M. (2012). Necesidades de consultoría

    en las MIPYMES del Valle de Sugamuxi en Boyacá. *Cuadernos de*

    Administración, 27(46), 67-80.

Greiner, L. E., & Metzger, R. O. (1983). *Consulting to management.* Englewood Cliffs,

    NJ: Prentice-Hall.

Griffith, A. I. (1998). Insider/outsider: Epistemological privilege and mothering work.

    Human Studies, 21(4), 361-376.

Hart, C. (1999). *Doing a literature review: Releasing the social science research*

    imagination. Thousand Oaks, CA: SAGE Publications.

Haslinda, A. (2009). Evolving terms of human resource management and development.

    The Journal of International Social Research, 2(9), 180-186.

Hesse-Biber, S. N., & Leavy, P. (2001). *The practice of qualitative research* (2nd Ed.).

    Thousand Oaks, CA: Sage.

Holland, J. L. (1997). *Making vocational choices: A theory of vocational personalities*

    and work environments. Englewood Cliffs, NJ: Prentice Hall.

International Labour Organization (2014). Trends in informal employment in Colombia:

    2009-2013. Regional Office for Latin America and the Caribbean.

International Labour Organization. (2013). *Measuring informality: A statistical manual*

    on the informal sector and informal employment. International Labour Office.

Jarvis, P. (1987). *Adult learning in the social context.* London: Croom Helm.

Kolb, D. A. (1984). *Experiential learning: Experience as the source of learning and*

    development. Englewood Cliffs, NJ: Prentice Hall.

Kubr, M. (2002). *Management consulting: A guide to the profession*. International

    Labour Organization.

Kuchinke, K. P. (1997). Employee expertise: The status of the theory and the literature.

    Performance Improvement Quarterly, 10(4), 72-77.

Kuchinke, K. P. (2001). Why HRD is not an academic discipline. *Human Resource*

    Development International, 4(3), 291-294.

Lee, M. (2001). A refusal to define HRD. *Human Resource Development International,*

    4(3), 327-341.

Lent, R. W., Brown, S. D., & Hackett, G. (2002). Social cognitive career theory. In

    Brown, D. (Eds.), *Career choice and development* (pp. 255-311). New Your,

    NY: John Wiley & Sons.

Lewin, K. (1951). *Field theory in social science.* New York: Harper & Row.

Lincoln, Y. S., & Guba, E. G. (1985). *Naturalistic inquiry*. Thousand Oaks, CA: Sage.

López, E., Sepúlveda, C. I., & Arenas, H. A. (2010). La consultoría de Gestión Humana

    en empresas medianas. *Estudios Gerenciales, 26*(114), 149-168.

Luborsky, M. R., & Rubinstein, R. L. (1995). Sampling in qualitative research rationale,

    issues, and methods. *Research on Aging, 17*(1), 89-113.

Malterud, K. (2001). Qualitative research: standards, challenges, and guidelines. *The*

    Lancet, 358(9280), 483-488.

Mann, K., Gordon, J., & MacLeod, A. (2009). Reflection and reflective practice in

    health professions education: A systematic review. *Advances in Health Sciences*

    Education, 14(4), 595-621.

McGuire, D., & Jørgenson, K. M. (2011). *Human resource development: Theory and practice.* Thousand Oaks, CA: Sage.

McLean, G. (2005). *Organization development: Principles, processes, performance*. San Francisco, CA: Berrett-Koehler Publishers.

McLean, G. N. (2004). National human resource development: What in the world is it? *Advances in Developing Human Resources, 6*(3), 269-275.

McLean, G. N., & McLean, L. (2001). If we can't define HRD in one country, how can we define it in an international context? *Human Resource Development International, 4*(3), 313-326.

Merriam, S. B., Caffarella, R. S., & Baumgartner, L. M. (2007). *Learning in adulthood: A comprehensive guide.* San Francisco, CA: Jossey-Bass.

Merriam, S. B. (2002). *Qualitative research in practice: Examples for discussion and analysis*. San Francisco, CA: Jossey-Bass.

Merriam, S. B. (2009). *Qualitative research: A guide to design and implementation*. San Francisco, CA: Jossey-Bass.

Nevis, E. C. (2001). *Organizational consulting. A Gestalt approach.* Cleveland: Gestalt Institute of Cleveland Press.

Niles, S. G., & Harris-Bowlsbey, J. (2002). *Career development interventions in the 21st Century* (4th ed.). Upper Saddle River, NJ: Pearson.

Ogliastri, E, & Davila, C. (1983). Estructura de poder y desarrollo en once ciudades intermedias de Colombia, [Power structure and development in eleven medium-sized Colombian cities], *Desarrollo y Sociedad, 12*, CEDE, Bogota.

Orrego, B. (2015). Caracterización de las Prácticas de Talento Humano en Empresas del
Valle del Cauca. *Revista Internacional Administración & Finanzas*, *8*(4), 1-25.

Patton, M.Q. (2002). *Qualitative research and evaluation methods* (3rd ed.). Thousand
Oaks, CA: Sage.

Polkinghorne, D. E. (2005). Language and meaning: Data collection in qualitative
research. *Journal of Counseling Psychology, 52*(2), 137-145.

Revista Misión Pyme. (2008). *El reto, la credibilidad*. Retrieved from
http://www.misionpyme.com/cms/content/view/52/9.

Ritchie, J., & Lewis, J. (2003). *Qualitative research practice: A guide for social science
students and researchers*. Thousand Oaks, CA: Sage.

Robinson, D. G., & Robinson, J. C. (2005). *Strategic business partner*. San Francisco,
CA: Berrett-Koehler.

Robinson, R. B. (1982). The importance of "outsiders" in small firm strategic planning.
Academy of Management Journal, 25(1), 80-93.

Ruona, W. E. A., & Gibson, S.K. (2004). The making of twenty-first-century HR: An
analysis of the convergence of HRM, HRD, and OD. *Human Resource
Management 43*, 49–66.

Saldarriaga Ríos, J. G. (2008). Gestión humana: Tendencias y perspectivas. *Estudios
Gerenciales*, *24*(107), 137-159.

Savickas, M. L. (2002). Career construction. In D. Brown, *Career choice and
development* (pp. 149-205). San Francisco: Jossey-Bass.

Saxton, T. (1995). The impact of third parties on strategic decision making: Roles, timing and organizational outcomes. *Journal of Organizational Change Management, 8*(3), 47-62.

Schein, E. (1999). *Process consultation revisited: Building the helping relationship.* Reading, MA: Addison-Wesley.

Schnarch, D., & Van Hoof, B. (2011). Strengthen management consultancy capacity in Colombia. The experience of learning by doing course. *Proceedings of the IMSCI 2011-5th International Multi-Conference on Society, Cybernetics and Informatics, USA, 1,* 271-276.

Schön, D. A. 1983. *The reflective practitioner: How professionals think in action*. New York: Basic Books.

Schwandt, T. A. (1994). Constructivist, interpretivist approaches to human inquiry. In N.K. Denzin & Y. S. Lincoln (Eds.), *Handbook of qualitative research* (pp. 118-137). Thousand Oaks, CA: Sage.

Servicio Nacional de Aprendizaje (SENA) (2015). Estudio de caracterización consultoría 2006. Retrieved from http://hdl.handle.net/11404/2104

Slatter, P. E. (1990). Models of expertise in knowledge engineering. In H. Adeli (ed.), *Knowledge Engineering: Vol. 1. Fundamentals* (130-154). New York: McGraw-Hill.

Spokane, A. R. (1991). *Career interventions.* Upper Saddle River, NJ: Prentice Hall.

Super, D. E. (1990). A life-span, life-space approach to career development. In D. Brown, L. Brook, & Associates (Eds.), *Career choice and development: Applying*

contemporary theories to practice (2nd ed.) (pp. 197-261). San Francisco: Jossey-Bass.

Swanson, R. A. (1995). Performance is the key. *Human Resource Development Quarterly 6*(2), 207-13.

Swanson, R. A. (1999). The foundations of performance improvement and implications for practice. *Advances in Developing Human Resources, 1*(1), 1-25.

Swanson, R. A. (2001). Human resource development and its underlying theory. *Human Resource Development International, 4*, 299-312.

Swanson, R. A., & Holton, E. F., III (2009). Foundations of human resource development (2nd ed.). San Francisco, CA: Berrett-Koehler Publishers.

The World Fact Book (2015). *South America: Colombia*. Retrieved from https://www.cia.gov/library/publications/the-world-factbook/geos/co.html

Visscher, K., Irene, J., & Visscher-Voerman, A. (2010). Organizational design approaches in management consulting. *Management Decision, 48*(5), 713-731.

Watkins, K. E. (1989). Five metaphors: Alternative theories for human resource development. In D. Gradous (Ed.), *Systems theory applied to human resource development* (pp. 167-184). Alexandria, VA: ASTD Press.

Werner, J. M. (2014). Connecting the dots or ships passing in the night? *The Routledge Companion to Human Resource Development*, 89-98.

Williams, C. C., & Youssef, Y. (2014). Combating informal employment in Latin America: A critical evaluation of the Neo-Liberal Policy Approach. *Research in World Economy, 5*(2), 1-14.

Wognum, I., & Fond Lam, J. (2000). Stakeholder involvement in strategic HRD

    aligning: The impact on HRD effectiveness. *International Journal of Training*

    and Development, 4(2), 98–110.

York-Barr, J., Sommers, W. A., Ghere, G. S., & Montie, J. (2001). *Reflective practice to*

    improve schools: An action guide for educators. Thousand Oaks, CA: Corwin

    Press.

INFORMATION SHEET AND CONSENT FORM (ENGLISH / SPANISH)

Information Sheet

Project Title: **Exploring Independent HRD Consulting Expertise and Practice in Colombia through Reflective Practice.**

You are invited to take part in a research study being conducted by Laura Cajiao-Wingenbach, a PhD student, and Dr. Khalil Dirani, an associate professor from Texas A&M University, College of Education and Human Development. The information in this form is provided to help you decide whether or not to take part. In order to increase privacy, no signature form will be transmitted via the internet; rather, a verbal agreement will be recorded for the interview, if you decide to take part in the study. If you decide you do not want to participate, there will be no penalty to you, and you will not lose any benefits you normally would have.

Why Is This Study Being Done?
The overall purpose of this study is to understand the specific experiences of independent Human Resource Development (HRD) consultant in Colombia. Specifically, my aim is to provide a framework about consultants' profiles and roles, scope of their interventions, type of services based on the sector of the business/industry/company, the organizational setting of the business where the consulting occurs, and the organizational setting of the consulting firm. This will be accomplished by capturing the lived experiences of these consultants when conducting training and development (T&D), career development (CD), and/or organizational development (OD) interventions in this country.

Why Am I Being Asked To Be In This Study?
     You are being asked to be in this study because you are:
a. Independent HRD consultant: these can be contractors, freelancers, self-employed, or small business owners, considered as a non-employee that provides a service or perform a work for a company for an agreed price.
b. Main focus of their services should be on T&D, CD, and/or OD as these are the core components of the HRD field.
c. Men and/or women living in Colombia.
d. Provide services to small and medium companies in Bogota, Medellin, and/or Cali.
e. Age and years of experience: 35 - 60 years old, and with at least 3 years of experience as an independent HRD consultant.
f. Must be working as a full time independent consultant.
g. Educational background: Industrial/Organizational Psychology, Business Administration, Industrial Engineering.

How Many People Will Be Asked To Be In This Study?
Four to fifteen people will be invited to participate in this study.

What Are the Alternatives to being in this study?
The alternative to being in the study is not to participate. No other activity will be given if you choose not to participate.

142

What Will I Be Asked To Do In This Study?
You will be asked to take part in 2 virtual interviews via GoToMeeting, each lasting one hour, and to provide a written self-report or journal about your experiences.
You may also be asked to review the transcript of your own interview afterwards.
Participation in this study will last up to 1 month.

Are There Any Risks To Me?
The things that you will be doing are no more/greater than risks than you would come across in everyday life. There are no physical, criminal, social, financial, economic, and psychological risks. The only risk would be the breach of privacy or confidentiality.

Although the researchers have tried to avoid risks, you may feel that some questions/procedures that are asked of you will be stressful or upsetting. You do not have to answer anything you do not want to.

Are There Any Benefits To Me?
The direct benefit to you by being in this study is you will have a chance to reflect on your work experiences.

Will There Be Any Costs To Me?
Aside from your time, there are no costs for taking part in the study.

No risk of injury or other harm is expected during participation in this study.

Will I Be Paid To Be In This Study?
You will receive a $20 Gift Card from Amazon. Participants taking part in the GoToMeeting interviews will receive the gift card through their email.

Will Information From This Study Be Kept Private?
The records of this study will be kept private. No identifiers linking you to this study will be included in any sort of report that might be published. Research records will be stored securely and only Dr. Khalil Dirani and Laura Cajiao-Wingenbach will have access to the records.

Information about you will be stored in locked file cabinet; computer files protected with a password.

People who have access to your information include the Principal Investigator and research study personnel. Representatives of regulatory agencies such as the Office of Human Research Protections (OHRP) and entities such as the Texas A&M University Human Subjects Protection Program may access your records to make sure the study is being run correctly and that information is collected properly.

The funding agency for this study and the institution(s) where study procedures are being performed (Texas A&M University) may also see your information. However, any information that is sent to them will be coded with a number so that they cannot tell who you are. Representatives from these entities can see information that has your name on it if they come to

143

the study site to view records. If there are any reports about this study, your name will not be in them.

Information about you and related to this study will be kept confidential to the extent permitted or required by law.

Will Photos, Video or Audio Recordings Be Made Of Me during the Study?
Your participation in the interviews will be audio recorded with your permission.

Interviews will be recorded through GoToMeeting so it be transcribed verbatim. The researchers will take notes of your comments during the interviews, if you do not give permission for the audio recording to be obtained.

_____ I give my permission for [photographs/audio/video recordings] to be made of me during my participation in this research study.

_____ I do not give my permission for [photographs/audio/video recordings] to be made of me during my participation in this research study.

Who may I Contact for More Information?
You may contact the Principal Investigator, Khalil Dirani, Ph.D., to tell him about a concern or complaint about this research (dirani@tamu.edu). For alternate contact you may also contact the protocol director, Laura Cajiao-Wingenbach at 979-985-1231 or lauravcm@tamu.edu.

For questions about your rights as a research participant, to provide input regarding research, or if you have questions, complaints, or concerns about the research, you may call the Texas A&M University Human Subjects Protection Program office by phone at 1-979-458-4067, toll free at 1-855-795-8636, or by email at irb@tamu.edu.

What if I Change My Mind About Participating?
This research is voluntary and you have the choice whether or not to be in this research study. You may decide to not begin or to stop participating at any time. If you choose not to be in this study or stop being in the study, there will be no effect on your status, medical care, employment, evaluation, relationship with Texas A&M University, etc. Any new information discovered about the research will be provided to you. This information could affect your willingness to continue your participation.

By participating in the interview, you are giving permission for the investigator to use your information for research purposes.

Thank you.

Khalil Dirani and Laura Cajiao-Wingenbach

Título del proyecto: Exploración de prácticas y competencia profesional en consultores independientes enfocados al desarrollo de recursos humanos.

Les invitamos a participar en un estudio de investigación llevado a cabo por Laura Cajiao-Wingenbach, estudiante de doctorado y el Dr. Khalil Dirani, profesor asociado de la Universidad de Texas A&M, Facultad de Educación y Desarrollo Humano. La información contenida en este documento se proporciona para ayudarle a decidir si desea participar o no en el projecto de investigacion. Para aumentar la privacidad y seguridad, ninguna forma de consentimiento se transmitirá por internet; por el contrario, si usted decide participar en el estudio se grabará el acuerdo verbal al iniciar la entrevista. Si usted decide que no desea participar, no habrá ninguna penalidad y usted no perderá los beneficios que normalmente tendría.

¿Por qué se está haciendo este estudio?
El propósito de este estudio es entender el significado de ser un consultor independiente enfocado al desarrollo de recursos humanos en Colombia. El objetivo especifico de este estudio, es capturar las experiencias de dichos Consultores al implementar intervenciones en entrenamiento, desarrollo de carrera, y/o desarrollo organizacional en Colombia. Se espera identificar a traves de estas experiencias, el perfil, roles, contexto organizacional, y alcance de las intervenciones de los Consultores independientes en desarrollo de recursos humanos.

¿Por qué se pide su participacion en este estudio?

Se pide su participacion en este estudio debido a que (1) es hombre o mujer viviendo en Colombia (2) es consultor/a independiente en desarrollo de recursos humanos, (3) el foco principal de sus servicios en capacitación y desarrollo, desarrollo de carrera y/o desarrollo organizacional, y (4) tiene al menos 40 años de edad y por lo menos 3 años de experiencia como consultor independiente en desarrollo de recursos humanos.

¿Cuántas personas se participaran en este estudio?
Cuatro a quince participantes serán invitados a ser parte de este estudio.

¿Cuáles son las alternativas para estar en este estudio?
La alternativa es no participar en el estudio. Ninguna otra actividad se le asignará si usted decide no participar.

¿Qué le pedirán hacer en este estudio?

Se le pedirá participar en 2 entrevistas virtuales a través de GoToMeeting, con duracion aproximada de una hora cada una. También se le pedira que desarrolle y envie un diario o reporte respecto a sus experiencias como consultor. Asi mismo, se le pedira que revise la transcripción de su propia entrevista.

Su participacion en este estudio de investigacion tendra una duracion de 1 mes.

¿Existe algún riesgo para usted?

No hay ningún riesgo fisico, penal, social, financiero, económico y/o psicológico. El único riesgo sería la violación de privacidad o confidencialidad.

Aunque los investigadores han tratado de evitar los riesgos, usted puede sentir que algunas preguntas y procedimientos que le hagan sean estresante o molestas. No tiene que contestarlo si asi lo desea.

¿Hay algún beneficio para mí?

El beneficio directo por participar en este estudio es la oportunidad para reflexionar sobre sus experiencias de trabajo.

¿Habrá algun costo para mí?

Aparte de su tiempo, no hay ningun costo por participar en el estudio.

Si usted sufre cualquier daño como consecuencia de participar en este estudio de investigación, por favor, comprenda que nada ha sido dispuesto para proporcionar tratamiento gratuito de la lesión o cualquier otro tipo de pago.

¿Recibira algun pago en este estudio?

Usted recibirá una tarjeta de regalo de Amazon por valor de USD$20 por participar en las entrevistas via GoToMeeting y enviar su reporte o diario. La tarjeta la recibirá a través de su correo electrónico.

¿Información de este estudio se mantendrá privada?

Los registros de este estudio se mantendrá privados. No hay identificadores que lo unan a este studio o que sea incluido en cualquier tipo de informe que sea publicado. Registros de la investigación serán almacenados de manera segura y sólo el Dr. Khalil Dirani y Laura Cajiao-Wingenbach tendrán acceso a los registros.

Su información se almacenará en archivador cerrado; archivos de computador son protegidos con una contraseña.

Personas que tienen acceso a la información incluyen el investigador principal y el personal del estudio de investigacion. Representantes de las agencias reguladoras como la oficina de proteccion de investigacion humana "Office of Human Research Protections" (OHRP) y entidades como el programa de proteccion de sujetos humanos "Human Subjects Protection Program" de la Universidad de Texas A&M pueden acceder a sus registros para asegurarse de que el estudio se ejecute correctamente y que la información es recogida de la manera mas adecuada.

146

La Agencia de financiamiento para este estudio y las instituciones donde están los procedimientos de estudio realizado (Texas A&M University) también puede ver su información. Sin embargo, se le asignara un numero para que no sea identificado. Representantes de estas entidades pueden ver la información que tiene su nombre, si entran al sitio de estudio para ver registros. Si hay algún informe sobre este estudio, su nombre no estará en ellos.

Información acerca de usted y demas relacionados con este estudio se mantendrá confidencial en la medida permitida o requerida por la ley.

¿Se tomaran fotos o se grabara video o audio el estudio?
Su participación en las entrevistas será audio grabada con su permiso.

Las entrevistas seran grabada a través de GoToMeeting, debido a que sera transcrita textualmente para facilitar el analisis de informacion. Los investigadores tomaran notas de sus comentarios durante la entrevista, si no es obtenido su permiso para grabar audio durante las entrevistas.

_____ Doy permiso para que grabaciones [fotografias/audio/video] se realicen durante mi participacion en este estudio.

_____ No doy permiso para que grabaciones [fotografias/audio/video] se realicen durante mi participacion en este estudio.

¿A quién puedo contactar para obtener más información?
Puede ponerse en contacto con el Investigador Principal, Khalil Dirani, Ph.D., para reportar alguna preocupación o queja sobre esta investigación (dirani@tamu.edu). Como contacto alterno puede comunicarse también con la directora de protocolo, Laura Cajiao-Wingenbach al 979-985-1231 o lauravcm@tamu.edu.

Para preguntas acerca de sus derechos como participante de la investigación, proveer retroalimentacion respecto a investigación, o si tiene preguntas, quejas o inquietudes acerca de la investigación, puede llamar a la oficina del Programa de Proteccion a sujetos de la Universidad de Texas A&M al teléfono 1-979-458-4067, linea gratuita 1-855-795-8636, o por correo electrónico a irb@tamu.edu.

¿Qué pasa si cambio de opinión sobre participar?
Esta investigación es voluntaria y usted tiene la opción de decidir si participa o no en este estudio. Usted puede decidir no participar o dejar de participar en cualquier momento. Si no desea estar no habrá ningún efecto sobre su estado, atención médica, empleo, evaluación, o relación con la Universidad de Texas A&M. Cualquier nueva información que sea descubierta acerca de la investigación se le proporcionará a usted. Esta información podría afectar su disposición de continuar con su participación.

Al participar en la entrevista, están dando permiso para que el investigador utilice su información para los fines de investigación.

APPENDIX B

CULTURAL LETTER OF UNDERSTANDING (SPANISH)

UNIVERSIDAD DE SAN BUENAVENTURA CALI

To: Texas A&M University IRB
From: Dr. Harold Viafara Sandoval, Director "Maestría en Alta Dirección de Servicios Educativos". Universidad de San Buenaventura Cali, Colombia.
Date: February 08, 2017
Re: Letter of Cultural Understanding

I am writing in regards to the graduate student at your institution, Laura Cajiao (researcher and protocol director), and the dissertation study that she will conduct with independent HRD consultants in Colombia. I am the Director of the Master program "Alta Dirección de Servicios Educativos" at Universidad de San Buenaventura located in Cali - Colombia, and I have held this position for five and a half years now. I am a native Colombian that understands the cultural, language, and demographical concepts that are important in formulating culturally appropriate research. In addition, I understand the processes that drive research, from data collection to data analysis. I have discussed the proposed research with the researcher, and understand the objectives in data collection. I also assisted the researcher in the material translation for accuracy.

Based on the review of subject recruitment methods with the researcher, I affirm that the use of virtual interviews and written self-reports, are culturally appropriate based on the demographics and the Colombian setting. Because of distance issues for the researcher, these measures will be taken in order to ease the data collection process. The use of recruitment materials such as social networks and emails, are socially acceptable for participants' recruitment. This study offers a $20 (US Dollars) Amazon gift card as compensation for participation. Participants will not be coerced in any form.

The utilization of a bilingual, understandable, information is important when working in Colombia. The researcher has developed accurate, understandable consent forms and interview guides for data collection. Participants will not be intimidated, or confused with the consent forms or interviews. The consent process does allow for adequate privacy among the participants; no names or other type of personal information shall be published. No other personal information shall be collected.

There is no perceived risk in conducting this study. No safeguards shall be needed to protect the rights or welfare of the subjects. Because there is no risk involved for the participants, no procedures are needed to reduce participant risk.

I recommend this study to be culturally appropriate based on the terms and conditions previously discussed with the researcher. This research may assist independent HRD consultants that work in this country, and around the world for the future. I look forward to hearing the results of this topic. This is not an official endorsement from "Universidad de San Buenaventura" but based on my personal knowledge of Laura Cajiao.

Regards,

Dr. Harold Viafara Sandoval
Director "Maestría en Alta Dirección de Servicios Educativos"
hviafara@usbcali.edu.co
57 (2) 488 22 22 Ext. 222 -217 - 57 (2) 318-6061440

Avda. 10 de Mayo, La Umbría, carretera a Pance. PBX: 318 22 00 - 488 22 22 • Fax: 488 22 31 • A. A. 7154 y 25162. Cali - Colombia, Sur América
Línea de atención gratuita: 01-8000-913303 • www.usbcali.edu.co. • e-mail: informacion@usbcali.edu.co

148

APPENDIX C

RECRUITMENT EMAIL (ENGLISH / SPANISH)

RECRUITMENT EMAIL (ENGLISH)

Subject: Help Needed for Dissertation Research Study

Howdy!

You are invited to take part in a research study (IRB-xxxxxxxxx) conducted by Dr. Khalil Dirani (associate professor) and Laura Cajiao-Wingenbach (doctoral student) from the Department of Educational Administration & Human Resource Development (EAHRD) at Texas A&M University. This study focuses on the meaning of being an independent HRD consultant in Colombia.

The Institutional Review Board (IRB) at Texas A&M University that enforces ethical conduct in research has approved this study and ensures that participation in voluntary and confidential. The attached information sheet provides complete information.

If you volunteer to help this study, you will be asked to take part in two - 1 hour GoToMeeting interview, and will be asked to fill out a written self-report of your consulting experiences. Please know that your anonymity will be maintained at all times and no comments will be ascribed to you by name in any written document or verbal presentation. Nor will any data be used from the interview that might identify you to a third party. A $20 gift card from Amazon is given to participants once they submit the written self-report, and the two rounds of interviews are completed.

Please contact Laura Cajiao-Wingenbach (lauravcm@tamu.edu) if you are willing to participate and meet the following criteria:
1. Men or women living in Colombia.
2. Independent consultant: can be contractor, freelancer, self-employed, or small business owner and considered as a non-employee that provides a service or perform a work for a company for an agreed price.
3. Main focus of your services as an independent consultant should be in T&D (Training & Development), C.D (Career Development), and/or O.D (Organizational Development).
4. You have at least 40 years old, and have 3 year of experience as an independent consultant providing services in the aforementioned areas.

If you don't meet the criteria, but know colleagues or professional contacts who may meet the above criteria, we would really appreciate if you forward the recruitment material to potential participants so they can contact the research team.

Thank you for taking the time to read this email. If you have any questions please contact Laura Cajiao-Wingenbach (lauravcm@tamu.edu) or Dr. Khalil Dirani (dirani@tamu.edu).

Laura Cajiao-Wingenbach
Ph.D. Candidate, Research Associate.
Department of Educational Administration and Human Resource Development
College of Education | Texas A&M University

Asunto: Ayuda necesaria para el estudio de investigación de tesis doctoral

Buenos dias,

Le invitamos a participar en la investigación (IRB-xxxxxxxxx) realizada por el Dr. Khalil Dirani (Profesor Asociado) y la estudiante de doctorado Laura Cajiao-Wingenbach del Departamento de Educación Administración y Desarrollo de Recursos Humanos (Educational Administration and Human Resource Development) de la Universidad de Texas A&M.

Este estudio se centra en el significado de ser consultor/a independiente en Desarrollo de Recursos Humanos en Colombia.

La Junta de Revisión Institucional (Institutions Review Board - IRB) de la Universidad Texas A&M que vela por una conducta ética en la investigación ha aprobado este estudio y asegura que la participación sea voluntaria y confidencial. La hoja de información adjunta proporciona información completa.

Si usted desea participar en este estudio, sera parte en dos entrevista de no mas de 1 hora cada una por medio de la aplicacion GoToMeeting, y debera llenar un diario sobre sus experiencias en consultoria. Anonimato se mantendrá en todo momento y no habran comentarios que serán atribuidos a usted en cualquier documento escrito o presentación verbal. Tampoco se utilizarán los datos de la entrevista que puedan identificarlo por un tercero. Una tarjeta de regalo de Amazon por valor de USD$20 se dara a los participantes una vez enviado el diario o reporte escrito y concluidas las dos sesiones de entrevistas.

Por favor, póngase en contacto con Laura Cajiao-Wingenbach (lauravcm@tamu.edu) si usted está dispuesto a participar y cumplir con los siguientes criterios:

1. Hombre o mujer viviendo en Colombia.
2. Consultor independiente: puede ser contratista, freelance, autónomo o pequeño empresario. Debe ser considerado como no-empleado que presta un servicio o realiza un trabajo para una empresa por un precio acordado.
3. El foco de sus servicios como consultor independiente debe ser: T & D (entrenamiento y desarrollo), C.D (desarrollo de carrera) y/o OD (desarrollo organizacional).
4. Tener al menos 40 años de edad y por lo menos 3 años de experiencia como consultor independiente, prestando servicios en las áreas ya mencionadas.

Si usted no cumple con los criterios previamente señalados, pero tiene colegas o contactos profesionales que pueden cumplir con los criterios anteriores, le agradeceríamos reenviar esta informacion para que se pongan en contacto con el equipo de investigacion.

Gracias por tomarse el tiempo de leer este correo. Si usted tiene alguna pregunta por favor póngase en contacto con Laura Cajiao-Wingenbach (lauravcm@tamu.edu) o el Dr. Khalil Dirani (dirani@tamu.edu).

Laura Cajiao-Wingenbach

APPENDIX D

SOCIAL MEDIA POSTS (ENGLISH / SPANISH)

SOCIAL MEDIA POST (ENGLISH)

Colleagues,

I'm currently working on my dissertation (IRB-xxxxxxxxx), with the aim of capturing the lived experiences of independent consultants when conducting T&D, CD, and/or OD interventions, and provide a framework about their profile, roles, the organizational context, and the scope of their interventions.

Individuals wishing to participate must meet the following criteria: (a) men or women living in Colombia; (b) independent consultant: can be contractor, freelancer, self-employed, or small business owner and considered as a non-employee that provides a service or perform a work for a company for an agreed price; (c) main focus of your services as an independent consultant should be in T&D (Training & Development), C.D (Career Development), and/or O.D (Organizational Development); (d) you have at least 40 years old, and have 3 year of experience as an independent consultant providing services in the aforementioned areas.

If you volunteer to help this study, you will be asked to take part in two - 1 hour GoToMeeting interview, and will be asked to fill out a written self-report of your consulting experiences. If you don't meet the criteria, but know colleagues or professional contacts who may meet the above criteria, we would really appreciate if you let us know to contact directly the individual.

If you have any questions, please contact Laura Cajiao-Wingenbach (lauravcm@tamu.edu)

Laura Cajiao-Wingenbach

151

Estimados Colegas

Estoy realizando mi tesis de doctorado (IRB-xxxxxxxxx) sobre consultores independientes en Desarrollo de Recursos Humanos en Colombia. El objetivo principal es identificar las experiencias de dichos consultores al implementar intervenciones en entrenamiento, desarrollo de carrera, y/o desarrollo organizacional. Este estudio busca proveer un marco de referencia sobre el perfil, roles, el contexto organizacional, y el ambito de aplicacion de sus intervenciones.

Las personas que deseen participar en este estudio deberan cumplir con los siguientes requisitos: hombre o mujer viviendo en Colombia; ser consultor independiente (contratista, freelance, autónomo o pequeño empresario, considerado como no-empleado que presta un servicio o realiza un trabajo para una empresa por un precio acordado); el foco de sus servicios como consultor independiente debe ser: entrenamiento, desarrollo de Carrera y/o desarrollo organizacional; tener al menos 40 años de edad y por lo menos 3 años de experiencia como consultor independiente, prestando servicios en las áreas ya mencionadas.

Con el objetivo de ampliar el número de participantes, me gustaría pedir la colaboración de personas con las que pueda entrar en contacto para poder realizar dos entrevistas, de promedio una hora de duración cada una. Es una conversación tranquila sobre experiencias como consultor independiente. Quien pueda ayudarme puede escribirme a lauravcm@tamu.edu.

Gracias!

APPENDIX E

INTERVIEW GUIDE (ENGLISH / SPANISH)

THE INTERVIEW GUIDE (FIRST SESSION)

Gender: ☐ Male ☐ Female

Age: ☐ Under 30 ☐ 31-40 ☐ 41-50 ☐ over 50

Years of Experience as an independent HRD consultant: _____

Area of services/interventions: ☐ T&D C.D ☐ O.D ☐

City: _____

Opening questions:

1. Tell me about yourself.
2. What does HRD means to you?

Transition questions:

3. Tell me your story of becoming an independent HRD consultant.
4. Why did you decide to become an independent HRD consultant?
5. Why not working for a consulting company?
6. Describe the process that you follow as a consultant from getting clients to closure of the consulting process.
   Probes:
- Entry
- Contracting
- Assessment
- Develop
- Implementing
- Closure
7. Tell me about your portfolio?
   Probes:
- Clients: size and type of organizations, sector(s), public/private.
- Portfolio: focus of services
- Type of HRD Interventions

Key questions:

8. From your perspective, what are the knowledge, skills, and attitudes an independent HRD consultant must develop/enhance to be an effective consultant?
9. Now, I'd like to ask you about your experiences you've had as an independent HRD consultant.
   Probes:

153

- Please describe a typical day in your role.
- How did you get your clients?
10. What are the successful experiences you have had when conducting T&D, C.D, and/or O.D interventions?
    Probes:
- Concrete details of participants' experience: how, when, what, why.
11. What did you like or dislike about that experience? And, why?
12. What are the challenging experiences you have had when conducting T&D, C.D, and/or O.D?
    Probes:
- Concrete details of participant's experience: how, when, what, why.
- Description of a situation in which the participant has experienced the phenomenon.
13. What did you like or dislike about that experience? And, why?

Ending question:

14. Is there anything else you want to add to what we were talking about today?

Note: Thank you so much for your participation. I will go back and transcribe this interview and send you a copy of the transcript for you to check if it captures what you wanted to communicate. If further clarifications were needed, I may come back for a brief meeting or send you an email with follow up questions.

GUIA PARA LA ENTREVISTA (PRIMERA SESION)

Genero: ☐ Masculino ☐ Femenino

Edad: ☐ Menor de 30 ☐ 31-40 ☐ 41-50 ☐ Mas de 50

Años de Experiencia como Consultor Independentiente: _____

Area de Servicios/Intervencion: ☐ T&D ☐ C.D ☐ O.D

Ciudad: _____

Preguntas de Apertura:

1. Hableme de usted?.
2. Que significa para usted Desarrollo de Recursos Humanos?

Preguntas de Transicion:

3. Cuenteme su historia de como se convirtio en consultor independiente en Desarrollo Recursos?.
4. Por que decidio convertirse en consultor independiente en Desarrollo de Recursos Humanos?
5. Por que no trabajar para una compañia de consultoria?
6. Describa el proceso que sigue como consultor, desde el conseguir hasta el cierre del procesos de consultoría.
   Preguntas de Exploracion:
   - Entrada
   - Contratacion
   - Assessment
   - Desarrollo
   - Implementacion
   - Cierre
7. Hableme de su portafolio de servicios?
   Preguntas de Exploracion:
   - Clientes: tamaño y tipo de organizaciones, sector, public o privado.
   - Portafolio: foco de servicios
   - Tipo de intervenciones para el Desarrollo de Recursos Humanos.

Preguntas Clave:

8. Desde su perspectiva, cuales son los conocimientos, habilidades, y actitudes que un consultor independiente de Desarrollo de Recursos Humanos debe desarrollar o mejorar para ser un consultor efectivo?

9. Ahora me gustaria preguntarle por las experiencias que ha tenido como consultor independiente.
Preguntas de Exploracion:
- Por favor describa un dia tipico en su rol como consultor.
- Como consigue sus clientes?
10. Cuales son las experiencias exitosas que ha tenido al implementar intervenciones de entrenamiento, desarrollo de Carrera, y/o desarrollo organizacional?
Preguntas de Exploracion:
- Detalles concreto de experiencias: como, cuando, que, por que.
11. Cuales han sido las experiencias mas retadoras que ha tenido como consultor independiente al implementar intervenciones en entrenamiento, desarrollo de Carrera, y/o desarrollo organizacional?
Preguntas de Exploracion:
- Detalles concreto de experiencias: como, cuando, que, por que.
- Descripcion de una situacion en donde el participante haya experienciado el fenomeno.
12. Que le gusto o no de esa experiencia? Y por que?

Pregunta de Cierre:

13. Hay algo mas que usted desee agregar a lo que hemos conversado hoy?

Nota: Muchas gracias por su participacion. Empezare a transcribir esta entrevista y le enviare una copia de esta para que revise si ha capturado lo que usted queria comunicar. En caso de necesitar clarificaciones, le enviare algunas preguntas de seguimiento via email.

APPENDIX F

INTERVIEW GUIDE FOLLOW UP QUESTIONS (ENGLISH / SPANISH)

THE INTERVIEW GUIDE (FOLLOW UP SESSION)

Opening questions:

1. What would you say are the highlights (best part) of your experience as an independent HRD consultant in Colombia?
2. What are some of the incidents that have influenced your experience?

Transition questions:

3. From your perspective, what are the benefits of being an independent HRD consultant in Colombia?
4. From your perspective, what are the reasons for people to become independent HRD consultants in Colombia?
5. From your perspective, what does it mean to be an independent HRD consultant in Colombia?
6. Based on everything we've talked about, is there one word that best describes your experience?
7. Based on your experience, if someone from wants to become an independent HRD consultant, what would be your advice to him/her?
8. If you were to start over again what were the things you would do differently?

Ending question:

9. Is there anything else you want to add to what we were talking about today?

Note: Thank you so much for your participation. I will go back and transcribe this interview and send you a copy of the transcript for you to check if it captures what you wanted to communicate. If further clarifications were needed, I may come back for a brief meeting or send you an email with follow up questions.

GUIA PARA LA ENTREVISTA (SESION DE SEGUIMIENTO)

Preguntas de apertura:

1. ¿Cuál diría usted que es lo más destacado (la mejor parte) de su experiencia como consultor independiente de DRH en Colombia?
2. ¿Cuáles son algunos de los incidentes que han influido en su experiencia?

Preguntas de Transicion:

3. Desde su perspectiva, ¿cuáles son los beneficios de ser consultor independiente de DRH en Colombia?
4. Desde su perspectiva, ¿cuáles son las razones para que las personas se conviertan en consultores independientes de DRH en Colombia?
5. Desde su perspectiva, ¿qué significa ser consultor independiente de DRH en Colombia??
6. Basándonos en todo lo que hemos hablado, ¿hay una palabra que mejor describa tu experiencia?
7. Con base en su experiencia, si alguien de quiere convertirse en un consultor independiente de DRH, ¿cuál sería su consejo para él o ella?
8. Si pudiera empezar de nuevo, que haría de manera diferente?

Ending question:

1. Hay algo mas que usted desee agregar a lo que hemos conversado hoy?

Nota: Muchas gracias por su participacion. Empezare a transcribir esta entrevista y le enviare una copia de esta para que revise si ha capturado lo que usted queria comunicar. En caso de necesitar clarificaciones, le enviare algunas preguntas de seguimiento via email.

APPENDIX G

SELF-REPORT (ENGLISH / SPANISH)

Self-report

Gender:　　☐ Male　　☐ Female

Age:　　☐ Under 30　☐ 31-40　☐ 41-50　☐ over 50

Years of Experience as an independent HRD consultant: _____

Area of services/interventions:　☐ T&D　☐ C.D　☐ O.D

City: _____

Guiding statements for reflection about experiences:

I feel good about being an independent consultant because..

I used to… but now I…

Two things I will remember about what I have learnt over the last 6 months are…

If I could do something again differently, I would…

One thing I will remember to do in the future is…

Independent HRD Consultants Self-report

	Experience	Awareness				
	Describe in detail the situation and circumstances of the experience (What, how, when, why)	How was the situation solved?	What I have learnt from this experience?	What does this experience mean to me?	A strategy that really helped me is…	How does this experience contribute to my personal and professional development?
Day 1						
Day 2						
Day 3						
Day 4						
Day 5						
Day 6						
Day 7						

Reporte/Diario Personal

Genero: ☐ Masculino   ☐ Femenino

Edad: ☐ > 30   ☐ 31-40   ☐ 41-50   ☐ < 50

Años de Experiencia como Consultor Independiente en Desarrollo de Recursos

Humanos _____

Area de Servicios/Intervencion: ☐ T&D ☐ C.D ☐ O.D

Ciudad: _____

Frases Guía para reflexionar acerca de experiencias:

Me hace sentir bien el ser consultor independiente porque…

Solia ser… Pero ahora…

Dos cosas que recordare acerca de lo que he aprendido en los ultimos 6 meses son…

Si pudiera hacer algo diferente, haria…

Una cosa que recordare hacer en el futuro es….

Reporte Individual

	Experiencia	Awareness				
	Describa en detalles la situacion o circunstancia de la experiencia (Que, como, donde, por que)	Como fue la situacion solucionada?	Que aprendi de esta experiencia?	Que significado tiene esta experiencia para mi?	Una estrategia que me ayudo realmente es..	De que forma contribuye esta experiencia a mi desarrollo personal y professional?
Dia 1						
Dia 2						
Dia 3						
Dia 4						
Dia 5						
Dia 6						
Dia 7						

APPENDIX H

GTM HANDOUT

Instrucciones para unirse a una sesión de GoToMeeting

El proceso de configuración de GoToMeeting en su computador puede tomar hasta 10 minutos. Por favor seguir los siguientes pasos:

1) Abrir la invitación enviada vía email. Hacer clic en el link de la reunión.

2) Dar permiso a GoToMeeting para ejecutar el lanzador (launcher). Haga clic en **Aceptar** o **Ejecutar.**
3) Después de que GoToMeeting abra, por favor seleccionar la opción de audio. Seleccione usar audio del computador "**Use computer audio".**
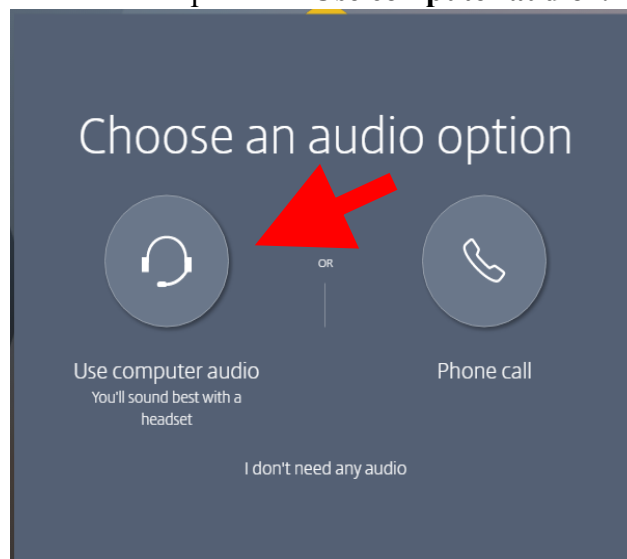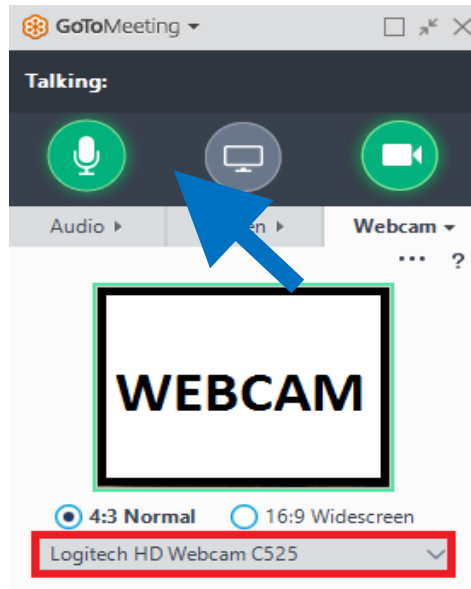
4) Se sugiere realizar una prueba de sonido usando el link "**Test your sound**". <mark>Clic</mark> <mark>OK</mark>.
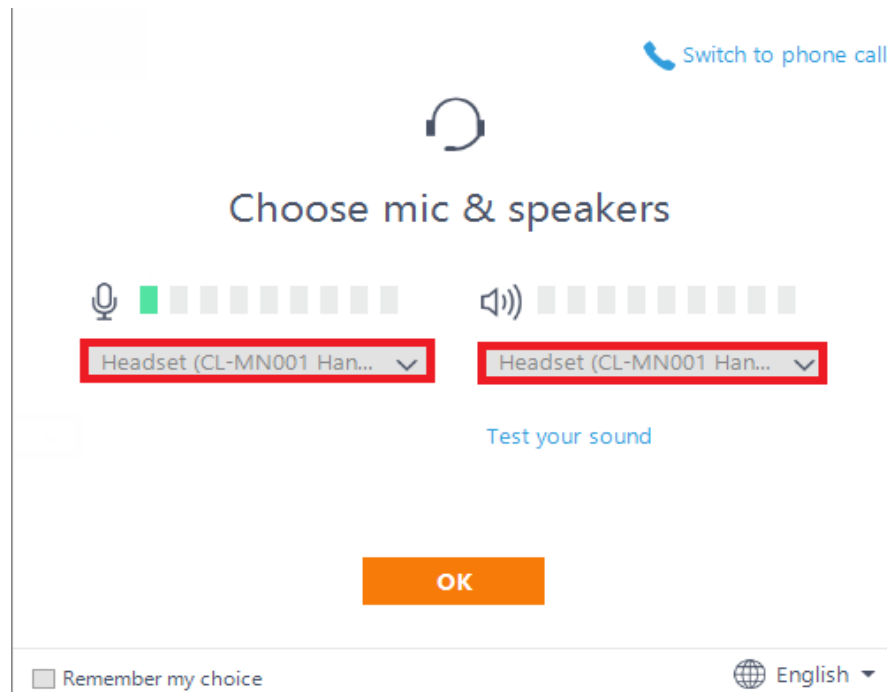
5) GoToMeeting le pedirá su nombre y correo electrónico (este último es opcional). <mark>Clic</mark> <mark>OK</mark>.

6) Por favor revisar que tiene habilitado el micrófono (ver abajo flecha azul). Cuando el botón este verde su micrófono estará habilitado. <mark>NO NECESITA HABILITAR SU CAMERA WEB</mark>.

7) Al terminar la entrevista, se le informara que puede cerrar la página. <mark>Hacer clic en cerrar "**CLOSE**"</mark>.
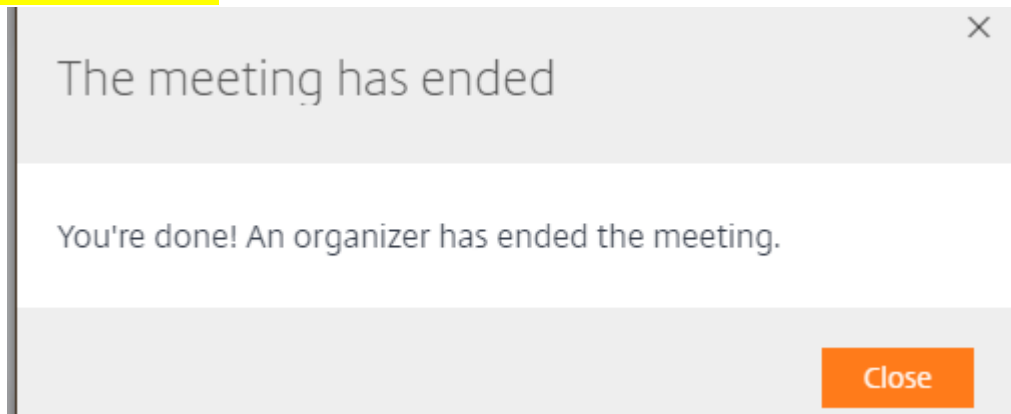
Muchas gracias por su tiempo y valiosa colaboración en esta investigación!