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EVIDENCE INFORMED STRATEGY TO IMPROVE ORGANIZATIONAL LEARNING ENGAGEMENT

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Abstract

The ability of an organization to effectively learn and apply knowledge not only equates with highly agile performance, it is increasingly important to surviving in a knowledge based economy. Organizational learning has been widely popularized in recent decades, however defining, coordinating, and maximizing this collective learning capability within organizations remains challenging. In part this difficulty may lie in conflicted views about the purposes of learning and who it benefits, varied ways in which learning or leading it can happen, and most importantly in employee's different motivations to engage in learning at all. This plan examines organizational learning engagement and targets changes and a solution to necessarily improve this active, immersive participation in learning. Changes required within the organization being examined include a need to balance a performance goal and managerial control emphasis over OL with a more explorative, employee centric, collaborative, learning growth strategy. Using team and authentic leadership in concert with Kotter's model and emergent change principles, this improvement plan forwards a community of practice engagement solution and means to implement, monitor and evaluate it. Informally led communities of practice embody engaged organizational learning, accomplished through socialized relational exchange, knowledge sharing, and the disseminated production-use of knowledge artifacts. This proposed solution aims to integrate into existing bureaucratic structure of the organization and provide synergistic benefit to managerial practices already supporting organizational learning. The community of practice solution is presented as a small increment change helping lay foundations for more ambitious visions of a strongly supported learning culture emphasizing high engagement at the organization.

EVIDENCED INFORMED STRATEGY TO IMPROVE OL ENGAGEMENT

Keywords: Organizational learning, Learning Engagement, Team Leadership, Authentic Leadership, Team learning, Community of Practice

Executive Summary

Today, organizations need to continually improve performance while also adapting to and growing within an increasingly turbulent global environment. Organizational learning (OL) helps achieve these high performance and innovative capacities (Rupcic, 2019) by providing the means to collectively acquire, interpret, share, and then apply knowledge (Crossan, Lane, & White, 1999; Jenkin, 2013). Learning is important to organizations but collectively establishing and supporting this process can be resource intensive and challenging to coordinate (Rupcic, 2019; Senge, 2006; Vera & Crossan, 2004), raising questions about the specific purposes and motivations to engage with it at all. Learning engagement involves energized immersion, dedicated interest, and active pursuit of learning but what drives engagement is complex and only partially understood (Azevedo, 2015; Henrie, Halverson, & Graham, 2015; Nägele & Stalder, 2019). This OIP heeds these challenges and examines organizational learning engagement with intents to forward the theoretically informed and evidence-based means to improve it.

Concrete suggestions for improving OL engagement within a specific institution operating in the medical education industry are presented. This institution anonymously referred to as Organization X, has a vested interest in leading learning excellence and history of hierarchal structure, bureaucratic decision making, and conservative-positivist traditions. The medical education industry is similarly influenced by positivism (Bunniss & Kelly, 2010) but has more recently placed high value on pluralistic and interrelated education worldviews (Gruppen et al., 2017; Harris et al., 2017). It is argued that an overemphasized positivist view of learning and excess conservative control used to structure, motivationally support, and coordinate OL processes currently hinders greater engagement possibilities at Organization X. Further, that

increased OL engagement is realized not by critically opposing these dominant ideals or disruptively replacing structure. Instead, these existing supports should be synergistically balanced with peer to peer employee influence and socially constructed learning processes advanced through an informally led and empowered organizational learning community.

Team and authentic leadership practices are discussed as the means to distributively lead a community of practice solution and its collectively engaged and accountable learning pursuits. These theories importantly value leadership as a dynamic co-influential process happening within a group as well as being something formally positioned individuals can do (Day, Gronn, & Salas, 2004; George, 2007; Lingard, 2016). A combined team-authentic leadership approach maximizes learning effectiveness through process and a supportive environment as well as being capable of better disseminating knowledge (Bell, Kozlowski, & Blawath, 2012; Koeslag-Kreunen et al., 2018; Salas, Sims, & Burke, 2005). These follower centric theories similarly appreciate collective creation, adherence, and accountability to common values or standards (George, 2015; Rupcic, 2019) that can further perpetuate active learning engagement and collective benefits for all.

In pragmatic fashion, Kotter's (1996) model is interpreted in the OIP as congruent with complex-emergent, informally led change (Evans, Thornton, & Usinger, 2012; Higgs & Rowland, 2005) presented as interwoven and complimentary steps which help improve organizational readiness and mobilize change. This pluralist, systems integrated thinking (Senge, 2006) representation of Kotter's framework also assumes change steps are not rigidly sequential but can instead be completed concurrently or necessarily revisited as contextual-situational realities present, change progress advances, and change is institutionalized.

The means to formatively implement, assess, monitor and evaluate the community of practice (COP) solution perpetuating improved OL engagement at Organization X are also discussed. Multi-source mixed methods data collection in implementation and evaluation stages of the plan will iteratively inform COP improvements as change is mobilized. The Dimensions of Organizational Learning Questionnaire (DOLQ) and Community Assessment Tool (CAT) surveys are core to the COP implementation and evaluation strategy. Use of these tools provides for agile monitoring as well as highlighting important metrics to communicate for increasingly empowered support as change progresses and increased OL engagement is institutionalized.

The OIP is concluded with a communications strategy as well as next steps and future considerations. Communication is important for improving OL engagement change readiness but is also needed to build stakeholder capacity and greater momentum to enact change. Ongoing support of this change is achieved through multi-way open dialogue (Senge, 2006; Senge et al., 2015) using various channels such as an organizational blog, research forum presentation, and peer reviewed journal.

This OIP also has potential limitations to consider. First, it recommends that the community of practice solution be integrated into an existing bureaucratic structure which may limit potential for broader OL dissemination practices via socio-relational engagement. Secondly, the informally led change may lack sufficient legitimate power for OL engagement to be institutionalized long term. These potential risks will be mitigated through close monitoring and attention to an integrated COP domain-purpose, membership diversity, and connectivity (Wenger, 2001, 2011) with which all organizational stakeholders can self-identify (Farnsworth, Kleanthous, & Wenger-Trayner, 2016) and thus support. In addition, continual communication about COP value outputs as tied to advancing both organizational and employee learning goals

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can help increase formal leadership buy-in over time and grow this small increment change to larger supportive learning ambitions.

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Abbreviations and Glossary of Terms

Comprehensive Health Initiative (CHI)

A strategic priority at Organization X, the CHI aims to improve the overall wellbeing of employees through the four total health pillars of physical, mental, work, and life balance.

Chief Knowledge Officer (CKO)

An individual responsible for the design, implementation and administrative oversight of an organization's knowledge infrastructure.

Community of Practice (COP)

Originally conceptualized by social learning theorist Etienne Wenger, they are most simply defined as “groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly” (Wenger, 2011, p.1)

Organizational Learning (OL)

Defined here as the integrative process by which individuals, groups, and then an organization acquires, shares, interprets, then applies new or existing knowledge for purposes of either improving current processes or building capacity to grow and innovate (Crossan et al.,1999; Jenkin, 2013; Senge, 2006).

Self-determination theory (SDT)

Self-determination theory (SDT) originated as a narrow theory of intrinsic motivation (Ryan & Deci, 2000) and has since been used to explain how fulfilling basic psychological needs for belonging, competence, and autonomy correlate with broader human motivations, personality development, and wellness (Ryan & Deci, 2019).

Knowledge Exploitation

Originally coined by March, knowledge exploitation refers to a major purpose or goal for desire to learn and involves seeking out increased knowledge to conservatively build on existing strengths and capitalize on what is already known.

Knowledge Exploration

March again coined the term suggesting knowledge exploration was another major purpose or goal for desire to learn and involves seeking out knowledge to grow, experiment and innovate.

Learning Engagement

Learning engagement is defined as dedicated interest, energized immersion, and active pursuit of learning that can be evidenced through a variety of sometimes overlapping cognitive, behavioral, socio-relational, and agentic indicators (Azevedo, 2015; Henrie, Halverson, & Graham, 2015; Nägele & Stalder, 2019).

Chapter 1: Introduction and Problem

Given the speed to which humans can now produce and access knowledge; interpreting, synthesizing, and utilizing it effectively has become more challenging for organizations but also essential to their growth and survival. Organizational learning (OL) is defined as the integrative process by which individuals, their work teams, and organization as a whole acquires, shares, collectively understands, then applies knowledge to improve existing processes and build capacity to grow and innovate (Crossan et al., 1999; Senge, 2006). Since Peter Senge popularized the topic over thirty years ago, OL inquiry has seen tremendous growth in research- practice communities and is commonly acknowledged as a primary means to secure competitive organizational advantage (Amy, 2008; Basten & Haamann, 2018; Vera & Crossan, 2004). This claim is supported with OL being empirically linked to improvements in organizational innovation, work performance, and net financial gain (Ellinger, Ellinger, Yang, & Howton, 2002; Rucic, 2019). Further, OL is a key factor influencing talent recruitment, employee retention, and organizational commitment (Griggs & Allen, 2018). Inclusive opportunities for OL is also a top ranked criteria diverse work sector employees use to continually identify the world's best employers (Joo & Mclean, 2006). Although organizational learning has tremendous performance and human resource potential upsides, effectively mobilizing the OL promise with fully engaged leader-staff practices is wrought with conflicting views, priorities, logistical challenges, and many practical unknowns (Basten & Haamann, 2018; Garvin, Edmondson, & Gino, 2008). Organization X is not immune to these obstacles and shows definite symptoms of an organizational learning (OL) engagement problem. This first chapter elicits contextual factors important to understanding gaps and future needs relevant to the OL engagement problem in addition to different theoretical and evidence based frames to view it. The chapter concludes by

situating this scholarly practitioner, curriculum designer, and informal leader within this context and introduces complimentary leadership approaches that will be used to address the problem.

Organizational Context

Organization X is an academic professional association active in implementing and evaluating national medical education standards. Its diverse operations are in part concerned with achieving these standards in university medical training programs and the continuing professional development activities of practicing physicians (Org X, 2018a). Institutional work also involves medical education product development, advocating for health policy reform, supporting medical education research, and international humanitarian outreach initiatives (Org X, 2018a). The medical education environment where Organization X operates is strongly influenced by positivist worldviews, scientific traditions and practices (Bunniss & Kelly, 2010). These dominate stances emphasize conservative hierarchal control, and rationalist-centralized-objective decision making (Feldman & Johnston, 2014; Guttek, 1997) which unsurprisingly also influences Organization X's existing reporting structure, common approach to leadership, and visible work-learning culture (Schein, 1996, 2017).

Although medical teaching-learning practices are heavily influenced by this ideology, interpretive knowledge forms have also gained an important foothold in medical education's evolving history and current environment (Gruppen et al., 2017). Complementing these conservative scientific traditions, the recently mandated CanMEDS competency based education framework is a more holistic and interrelated view of physician learning expectancies. In short, this framework symbolically represents that scientifically informed medical expertise of the past *also requires* interpretive, context interdependent, plural understandings of the world (Gruppen et al., 2017; Harris et al., 2017). Given the historic environmental influence the CANMeds

framework has, it seems intuitive and necessary that Organization X also adapt its current OL strategy to accommodate pluralistic rather than sole positivist-functionalist ways of thinking and being.

Organizational Vision-Mission

Organization X aims to “improve societal health through the service based leadership of medical education excellence worldwide” and this mission is guided by espoused values of integrity, accountability, collaboration, and respect (Org X, 2018a). Given the focus of leading education excellence on such a large, virtuous, and collaborative scale, it is hard to ignore the relevance that the topic of organizational learning has and potential impact that high collective engagement with it could have in helping employees and Organization X achieve their goals.

Political and Structural Context

Macro level medical education governance in Canada involves a multi-layered but horizontal organizational network of regulatory and licencing bodies, universities, specialty societies, and federal government funders (Saad & Pardhan, 2011). Governing networks are important for integrating mutually beneficial goal achievements; however, this interdependent structuring is also scrutinized for inefficiencies, slow response times, and a perceived inability to keep up with rapidly changing societal demands (Austin & Jones, 2016). Macro-medical education politics are similarly criticized, given the numerous organizations required to function in distributed leadership, perceived blurred lines of individual organizational accountability and reported poor communicative-collaborative synergies (Saad & Pardhan, 2011). The distributed requirements of this political structure coupled with its criticisms all raise questions about the type of leadership being enacted within it, and more importantly if the right leadership *process* to collaboratively lead the governance charge currently exists?

In contrast, meso-level governance *within* Organization X is hierarchal in structure with an executive directorate at the top making centralized decisions who are interdependently advised by committees and sub-committees consisting of other formal organizational leaders (e.g. directors, associate directors). Continuing professional development of Organization X's physician association members falls under this meso level of governance; however, there is no committee oversight of internal employee OL and development strategy at this level. Instead, executive council votes to approve and implement internal OL and development mandates that are forwarded up from the micro governance level.

Micro-level governance supporting OL and employee development is a priority of the human resources office, who in implementing its workforce planning strategy seeks the “continuous development of employee capabilities, skills and competencies to remain successful in meeting organizational goals and objectives” (Org X, 2018b, p. 1). Some structural aspects of this OL development strategy include a yearly performance appraisal (PA) policy-process, leader-employee learning mentorship expectations, and the continuing professional development funding application process. These collectively aim to “work together to plan, monitor, and review an employee's work objectives and overall contributions to the organization” (Org X, 2018b, p. 2).

PA documentation requires that employees elicit significant job accomplishments as well as career-learning development goals every year. Employees identify learning goals aligned with their specific work role and also how these targets contribute to organizational goal achievement. Numerical job performance ratings are appraised by managers and these ratings directly inform compensation bonuses and/or annual salary raises. Job performance ratings can also provide documented rationale for identifying high potential employees who may be targeted for career

advancement. Employees assessed as underperformers may have “supervisors decide to provide additional training or prepare a Performance Improvement Plan (PIP) to assist the employee with their areas requiring development” (Org X, 2018b, p.3).

Formal leaders are also expected to hold ongoing conversations outside of the yearly PA process to facilitate learning and development of employees who report to them. These discussions are seen as a valuable means to tie OL to job performance by providing “frequent opportunities for ongoing feedback and coaching” (Org X, 2018b, p.3). Mentors, coaches, and leaders *are* important to learning goals as mentioned in both the professional development (Ehrich, Hansford, & Tennent, 2004) and OL literature (Ng & Ahmad, 2018; Vera & Crossan, 2004). However, definitive cause-effect relationships between supervisors playing the learning mentor role and increased motivation-learning engagement are not always so straightforward (Bullough & Draper, 2004; Eby, 2007; Ng & Ahmad, 2018).

All full-time employees are eligible for generous yearly professional learning and development stipends. The funding application and approval process is somewhat similar to documentation requirements within an employee’s yearly performance appraisal. Applications must clearly state how the proposed learning development contributes to current or future vocational needs and how this learning also ties to goals of the organization. Funding approval decisions are based on contents of this application, previous employee performance ratings, and require more inquiry and escalating hierarchal levels of administrative approval depending on the amount requested.

Organizational Learning and Work Culture

In addition to hierarchal structure and bureaucratic processes impacting OL engagement, the diverse task work of directorate offices and their sub-unit departments at Organization X is

primarily organized for autonomous completion. However, there are many operational and performance interdependencies when completing complex education projects and supporting the same organizational mission-vision. This systems thinking perspective, views work performance and OL as interdependently linked and values them as collectively complimentary (Senge et al., 2015). An example of requiring collaborative project work and learning together is noted in the planning, design, development, dissemination, and evaluation of education materials or programs. It is not hard to imagine that this work demands multiple stakeholder skillsets and various departmental teams to contribute, communicate well, and be coordinated across organizational boundaries. High departmental individualism though and limited inter office collaboration when completing education projects, or more importantly learning from them, has resulted in previous performance challenges. These OL and work practice examples also provide evidence of what Schein (1996, 2017) refers to as visible culture permeating Organization X, which in addition to managerial control emphasis, appears focussed on individual versus collective learning and work performance achievements. Exposing discordance between these isolationist cultural work-learning practices and the espoused values (e.g. collaboration, accountability) of Organization X helps elicit hidden assumptions of organizational culture (Schein, 1996). Further, this value-practice discordance also assists in helping frame and mend the gap to the OL engagement problem.

As highlighted in this section, conservative control emphasis, positivist ideology, and high departmental autonomy heavily influence the existing environmental context, organizing structure, OL supports, and cultural work-learning practices at Organization X. Supervisors are primary gatekeepers deciding which learning goals to pursue and those that are rewarded, and these bureaucratic decisions are primarily made in relation to existing vocational roles and siloed

work expectations. This primarily authoritative and transactional form of leadership decision making (Howell & Avolio, 1993; Nguyen & Mohamed, 2011) is also the expected catalyst to motivate employees to engage in OL pursuits. A main argument forwarded throughout this OIP is that this formal leadership over-emphasis and excess control leaves follower input underappreciated in OL strategy, resulting in employee disengagement with it. This claim is supported by OIP literature review findings that the majority of peer reviewed research-practice publications discussing OL only target formal leadership audiences. It will also be argued that existing siloed structure and autonomous work-learning expectations limits greater OL engagement potential, or in other words, collective learning participation on a wider scale. Deep inquiry into what drives or hinders frontline OL engagement is an important opportunity for Organization X and holds potential to unleash synergistic knowledge resources largely left untapped yet essential to the evolving future. Improving OL engagement also aligns with the aspirational vision, core values, and evolving external environment at Organization X which currently sit in contrast to its observable isolationist work and learning culture.

Additional details contextually situating this author as a leader, vantages further framing the OL engagement gap and collaborative leadership approaches informing these philosophies are further described in next sections of this chapter.

Leadership Position and Lens Statements

OL strategy is regulated by senior executives, therefore questioning problem scope, as well as this practitioner's approach and ability to address a chosen problem of practice (UWO, 2017) without holding formal leadership power is important to consider. The following section elicits how my curriculum design role requires expert working knowledge necessary to build quality education (e.g. engaging OL) and also the informal leadership abilities needed to

influence education building process and multi-level stakeholders along development. It is also forwarded that my philosophy and past life experiences, in conjunction with deep doctorate level inquiry and leadership commitment have serious potential to affect complex and emergent changes (Higgs & Rowland, 2005; Lichtenstein et al., 2006) pertinent to addressing this problem.

Philosophy

My leadership philosophy is summarized as the purposeful moral craft and authentic team based process of connecting with, influencing, and being positively influenced by others when working towards our collectively coordinated and cohesive achievement of common goals benefitting us as individuals but more importantly society as a whole. Team and authentic leadership theories introduced in subsequent paragraphs align with and help inform this personal philosophy. Pragmatic and social constructivist learning perspectives also described later are similarly interconnected with this leadership worldview and interwoven with OL engagement problem indicators and contributors to be mentioned as well.

Philosophic reflections about knowledge, people, the world, and self-identity are important because they command every leadership moment; from information we choose to value, situations chosen to apply this knowledge to, and also ways that followers are viewed and interacted with (Bridges & Smith, 2006; Ramsay & Fitzgibbons, 2005). My ontological and epistemological beliefs about reality and the nature of knowledge are rooted in both pragmatic and social constructivist stances. Pragmatism emerged from American scientific founders who, inspired by Darwin's theory on the adaptive-evolving ability of communities to thrive in harsh conditions, holistically advanced their philosophic thinking from sole scientific objective traditions and stagnant hierarchal rules (Campbell, 2015). The pragmatic view acknowledges multiple possibilities *both* objective and subjective to explain phenomena and assumes that "all

knowledge is understood to be limited...in need of continual scrutiny” (Brown & Doane, 2007, p.100). This is important to the POP because pragmatism suggests more than objective internal cognition, behavior, and practical tasks are important to organizational learning; the stance also values that knowledge continuously evolves and is gained through experience, human social relations, and interaction with the environment (Elkjauer & Simpson, 2011; Mead, 1913).

Social constructivism expands upon these pragmatic learning ideals positing that higher level knowledge development results from collaborative learning with others and exists interdependently within the environmental context where learning occurs (Vygotsky, 1980). This view holds that people build on their existing knowledge through relational interactions and reflecting on the different experiential perspectives of others which allows previous assumptions to be challenged and new meanings to be co-created together through dialogue (Mackenzie & Knipe, 2006; Thomas et al., 2014; Vygotsky, 1980). Thus, these pragmatic and social constructivist visions of truth acknowledge objectivity as dynamic, both constructed within and influenced by its inseparable relationship with people and the changing contexts of their world. As a registered nurse and medical education curriculum designer, I do value objective knowledge forms rooted in positivism; however, am critical when this knowledge is hierarchically ranked as most valid in all instances or presented as devoid of context, values, and other human influences.

Pragmatist and social constructivist worldviews then, are important lenses framing this OIP. First, these stances respectfully acknowledge the merits of but also allow room to evolve beyond functionalist-positivist knowledge dominance influencing the medical education world (Bunniss & Kelly, 2010) and internal organizational environment where I lead. Secondly, these worldviews value rather than discount the important interdependent connections between humans learning together within and shaping their environment together. Using these

contextually bound, human collective worldviews of organizational learning and leadership is a more comprehensive and powerful means to view and approach the OL engagement problem. Pragmatic and social constructivist views hold new and exciting promise for disseminating greater and more meaningful learning engagement possibilities across the organizational community.

Personal Agency

This practitioners' curriculum design role involves dynamic, emergent, and complex leadership (Lichtenstein et al., 2006) and demonstrates how personal rather than legitimate power (Northouse, 2016) can exert influence within teams and over education development processes. This author's efferent power sources include holding education design, healthcare professional, and high reliability teamwork knowledge-practice expertise, coupled with a relational ability to authentically and meaningfully connect with others through mutual respect, collegiality, and trust. There are various stakeholders involved in the building stages of needs assessment, planning, development, dissemination, and evaluation of quality medical education materials. Curriculum designers influence these multi-level stakeholders whose unique roles, interests, values, and ideas must all be communicated to others, negotiated to focus on common goals, and coordinated into task completion along each phase of the educational development process. The role is accountable for many decisions made at all development stages so that cohesive integration of curriculum components are maintained and that end products meet quality standards (e.g. accreditation, accessibility) while also being produced on time, budget, and in accordance with intended program or organizational goal expectations.

Many co-workers mention that I am charismatic, passionate, and likeable and these traits frequently grant me respect and influential admiration from others. Colleagues and stakeholders reliably encounter a humble sense of humour, commitment to quality improvement, and caring

humanistic drive to always engage, openly communicate, and build lasting relationships with all people. I reach out with genuine interest and talk to everyone from senior executives to custodial crew level followers. People know me and these authentic relational connections have always proven important to personal power and successful influence whether directly tied to a work role or broadly influencing an organizational environment. The preceding philosophy and experiential narratives are further tied to personal agency and leadership theoretical specifics below.

Authentic Leadership Influence

Inspired by virtues and the disturbing trend of decreasing trust in leaders, George (2003) asserted that contemporary leadership development required more ethical emphasis rooted in self-authenticity. Developing authentic leadership (AL) theory George (2003) first defined authentic leaders as those who “lead with purpose, values, and integrity; leaders who build enduring organizations, motivate their employees” (p. 9). Guided by their internalized moral perspective, balanced information processing, and transparency, authentic leaders draw on their life experience and self-awareness to self-regulate leadership behavior and promote relational connections with followers (Avolio, Walumbwa, & Weber, 2009; Banks, McCauley, Gardner, & Guler, 2016; George, 2015). Authentic leaders are confidently driven by their values, knowledge of strengths-personal limitations and who openly share opinions and feelings without concern (Avolio, Walumbwa, & Weber, 2009; Banks, McCauley, Gardner, & Guler, 2016). Criticizing authentic leadership, Ford and Harding (2011) suggest the impossibility of a leader expressing authentic values given these are also said to be indistinguishable from those of the organization. These main tenets and criticism of AL theory prompted deep reflection about whether my

personal values were aligned and could be authentically expressed both in the curriculum design role and underlying purpose of this OIP.

Strong value convictions informed by crucible life experiences (George, 2015) working closely with doctors was a strong motivator for choosing to leave a successful clinical nursing career and pursue work at Organization X. This workplace whose vision, work, and values aim to lead educational excellence and change traditional methods by which physicians are educated and expected to serve society authentically inspired me to make the move. Facing harsh criticism for supposedly abandoning the nursing discipline, I instead saw purposeful leadership opportunity (George, 2015) where personal nursing experience and education knowledge could help enable an important education mandate (i.e. CanMEDS) that I similarly valued as a necessary change to healthcare.

Authentically role modelling such values in the curriculum design role is evidenced by the continual steering of stakeholders and processes back to organizational values or standards (e.g. collaboration, integrity, CanMEDS, accreditation, accessibility) which I also believe builds higher quality healthcare for patients and learner value in education. Aligning education development with these standards while actively helping and collectively holding stakeholders accountable to meeting them is in my interpretation absolutely authentic, and requires relational ability informed by authentic leadership.

Further, authentic leadership evolves from self-awareness which can continually be developed rather than exist only as a have it or not phenomenon (Avolio & Gardner, 2005; George, 2015). Aware of the need to continually develop, refine and personally push open communication skills, as an authentic leader I consciously challenge myself to do so and receive feedback from others (George, 2015) at every opportunity. Actively contributing opinions and

ideas through an authentic voice is important to building authentic leadership trust (George, 2007) in a curriculum designer whether voicing risks, opportunities, and threats to high level decision makers or continually communicating ongoing needs and expert knowledge support to those following me side by side in development.

Authentic leaders maintain consistent value integration across situations, problems or environments (George, 2015) thus contributing an active transparent voice driven by these purposed values is also important to this OIP. First, these authentic leadership practices are important for raising awareness about the OL engagement problem and respectfully criticizing dominant structures and current leadership practices that perpetuate it. Further, using authentic leadership driven by value convictions that are organizationally aligned has potential to build even deeper trust in this scholarly practitioner and OIP to help transform Organization X to a mutually beneficial high OL engagement state.

Team Leadership Influence

McGrath (1991) first introduced individual team leadership functions as the need to diagnose and take remedial actions on internal group deficiencies, or anticipating and preventing harmful environmental changes external to the team. Since these early introductions team leadership has evolved from individualistic leader notions to instead being defined as a collectively distributed influencing process simultaneously enabled by empowered formal leaders and followers (Day et al., 2004; Koeslag-Kreunen et al., 2018). Internal task leadership actions include maintaining team focus by clarifying desired goals, facilitating decision making by encouraging open information sharing, structuring or planning processes, and monitoring-confronting team performance issues (Day et al., 2004; Smith et al., 2018). Team leadership involves constant attention to monitoring other members, the current problem or situation, and

then deciding whether and when to take action (Salas, Cooke, & Rosen, 2016). These actions can be task oriented where leaders help fulfill team responsibilities or relationally targeted where conflict mitigation and cohesion are the focus (Salas, Sims, & Burke, 2005; Smith et al., 2018). Important relational team leadership tasks include building co-commitment, supporting or coaching individual members, role modelling ethics, and respectfully managing inevitable team disagreements (Barton, Bruce, & Schreiber, 2017). High performing, consistently reliable teams are good at achieving their coordinated objectives, but also at working through constructive conflict together in a cohesive manner (Koeslag-Kreunen et al., 2018; Salas, Sims, & Burke, 2005).

Team leadership also resonates with my philosophic core, evolved again from past experiences witnessing how preventable healthcare errors and unnecessary patient harm primarily results from dysfunctional teams and poor teamwork (Rosen et al., 2018). Personal goals of wanting to prevent similarly important (but less obvious) harms inside my workplace coupled with robust evidence correlating high performing teams with improved patient and organizational outcomes (Hughes et al., 2016; O'Neill & Salas, 2018) continue to be key motivators. Also, the process of high reliability teamwork focusses on flattening hierarchal power relations, and the open sharing of information and decision making among team members (Day et al., 2004; Smith et al., 2018). This flattened power distribution, safe open dialogue, and cooperative decision making expectations are similarly essential to OL success (Senge, 2006; Senge et al., 2013). Curriculum designers like myself who use a team leadership approach, mitigate conflict, help coordinate multiple tasks and actively seek out diversity in others' opinions, thus creating a communicative environment where people feel safe to share ideas when contributing collectively to building better education than anyone could do alone. The ability to

freely express value opinions in safe and open communicative environments established by team leadership is especially important given the authentic leadership practices and criticism previously mentioned. Team leadership is not only demanded throughout all curriculum design processes, it is a necessary complement to authentic leadership that I hope to continually advance through change agency in this OIP and the broader societal community.

This section has provided details about this author's informal position of power and described how authentic and team leadership approaches inform personal philosophy and provide the agentic means to exercise collaborative influence at Organization X. Pragmatic and social constructivist worldviews were also introduced and highlighted as necessary lenses to comprehensively view and approach the OL engagement problem. Greater specifics and evidence surrounding the problem are provided in next sections in addition to other theoretical vantages deemed important to framing it.

Leadership Problem of Practice

This OIP aims to help tackle the problem of poor organizational learning engagement among frontline employees at Organization X. OL engagement is defined in this OIP as energized active immersion and participation in collective learning (Azevedo, 2015) that is applicable to one's work, career development, and goals of the organization (Crossan et al., 1999; Jenkin, 2013). Internal data suggesting existence and potential contributors to the OL engagement problem include generous learning development funds being used by only 50% of frontline staff (Org X, 2018b). Exit interviews and staff survey results suggest lacklustre employee learning growth and highlight increased attrition rate trends with voluntary resignation reasons given of poor cultural fit, a perceived need to seek out expanded career opportunities, and non-descript concerns with management (Org X, 2018b). Structural examination of

performance appraisal and OL funding policy, processes, and documentation detailed previously, highlight excessive bureaucratic control, little reward incentives for learning goal achievement, and zero accountability to strategically track, feed forward, or evaluate any organizational learning that occurs. Lastly, although direct supervisor support is empirically shown to positively influence OL motivation and engagement (Ng & Ahmad, 2018), of concern is that “useful coaching received from direct managers” at Organization X is reported by only 59% of employees (Org X, 2019). Although supervisors can facilitate OL engagement, research suggests that peer to peer motivational influence can actually be a more significant determinant of it (Deci, Olafsen, & Ryan, 2017; Ng & Ahmad, 2018).

As highlighted in this chapter, organizational learning initiatives, structural considerations, and managerial resource supports do exist at Organization X; however these processes and sole formal leadership direction used to guide them appear insufficient at engaging many frontline employees in OL. This lack of OL engagement not only limits meaningful generation and application of knowledge to an individual’s work, it constrains greater possibilities of building or transferring knowledge when needed across organizational boundaries. Sole emphasis on only formal leaders to facilitate OL engagement also places pressure and extra workload on managers who may not currently have the capacity to drive engaged employee learning on their own. This claim is supported by internal data showing an upward trend in forfeited vacation hours among managers (Org X, 2018b) and also that only 50% percent of all staff report that they “rarely leave work feeling mentally or physically exhausted” (Org X, 2019). If Organization X’s aim and vision is to be the collaborative leader of global medical education excellence, then what OL engagement solution will adequately support all its employees to purposefully help lead this mandate forward?

The next section of the OIP dives deeper into the OL engagement problem at Organization X. Important theoretical frames used to view the problem are presented to better understand it in addition to providing some initial cues and remaining questions requiring answers in order to help solve it.

Framing the Problem of Practice

Like leadership or philosophic views, descriptions of organizational learning (OL) vary widely so a working definition and its underlying assumptions are required within this OIP. OL is framed in this plan using 4i model (Crossan et al., 1999; Jenkin, 2013) and Fifth discipline (Senge, 2006) organizational learning theory. It is defined as the integrative process by which individuals, groups, and then an organization acquires, shares, interprets, then applies new or existing knowledge for purposes of either improving current processes or building capacity to grow and innovate (Crossan et al., 1999; Jenkin, 2013; Senge, 2006).

The 4i model presents integrated steps of OL which include *intuiting*-where knowledge acquisition, processing, and pattern recognition happens at the individual employee level and then *interpreting*-where individually patterned knowledge is further built and refined in relation to context and by information sharing and sense making conversations with others (Crossan et al., 1999; Jenkin, 2013). *Integrating* involves coming to shared understandings where this knowledge is adjusted further and then coordinated into some purposeful action (Crossan et al., 1999; Jenkin, 2013). *Institutionalizing* follows, where significant and successful knowledge integration processes are embedded into task action rituals (e.g. policy-procedure) which can be described and reproduced in the future (Crossan et al., 1999; Jenkin, 2013). Energizing these integrated OL steps, Fifth discipline theory explains essential conditions for a learning

organization to flourish (Senge, 2006) and these conditions are similarly conducive to promoting high collective OL engagement (Reese, 2019).

Fifth discipline OL enablers include personal mastery, mental models, shared vision, team learning, and systems thinking (Senge, 2006). *Personal mastery* involves having clearly defined individual goals that also benefit the organizational community, appreciating lifelong learning as a means to achieve them, and then fueling these collective goal pursuits through motivational role modeling and capacity building means (Reese, 2019; Senge, 2006). Seeking to elicit individual assumptions, exposing *mental models* that people hold is another Fifth discipline element (Senge, 2006). This involves having people safely air out their perceptions of reality so any potential flaws and new diverse ways of thinking are explored (Senge, 2006). Mental models are habitual yet malleable patterns of thought which both consciously and unconsciously guide our actions (Reese, 2019). Having *shared vision* is the third disciplinary component to which people may respond through active working support or not be committed at all (Evans, Thornton, & Usinger, 2012). Necessary wide commitment is facilitated through leaders seeking active involvement and collective stakeholder input into this shared vision (Evans, Thornton, & Usinger, 2012; Senge et al., 2013). *Team learning* is the fourth discipline enabling high OL engagement where collective capacity to enact shared vision is built by aligning common goals and coordinating diverse yet complimentary knowledge-skills of people in a group effort (Senge, 2006). Team rather than individual participation adds value to OL by enriching and sustaining what is learned (Rebelo et al., 2019), in addition to promoting institutionalization of knowledge if local teams are further integrated with each other (Senge, 2006). Finally, *systems thinking* is the necessary interwoven link between all discipline components which involves broad situational awareness of the internal and external organizational environment (Rebelo et al.,

2019) and appreciating how any one input or change within these environments influences and impacts everything else (Senge, 2006; Senge et al., 2015).

Organizational learning as informed by these two theories provides some important assumptions and theoretical links necessary to mention. First, OL is distinguished from the liberal search of knowledge simply for increased knowledge sake, and instead defined in this OIP as the purposeful, collective learning pursuit and critical feedback required to guide pragmatic action (Crossan et al., 1999; Jenkin, 2013; Senge, 2006). Tying learning to action is important because this not only signals engagement (Azevedo, 2015), simply learning more does not necessarily lead to knowledge being usefully applied to organizational challenges (Crossan et al., 1999; Hirst, Van Knippenberg, & Zhou, 2009).

Underlying assumptions that OL involves contextually bound knowledge generation precipitated by collective employee learning and action also align with main tenets of pragmatist (Elkjauer & Simpson, 2011) and social constructivist philosophies (Mackenzie & Knipe, 2006; Thomas et al., 2014; Vygotsky, 1980). As already mentioned these views are necessary to expand upon dominant positivist claims that learning is merely an internal cognitive process uninfluenced by context and happening inside individual minds (Winn, 2013). Individuals can perhaps learn in isolation but organizations are not individuals. They are a networked community or team of individuals organized to achieve common goals for which socially constructed learning, knowledge sharing, and its collective application are important (Senge et al., 2013). Framed by these worldviews, OL and the integrative utilization benefits it promises must then assume that engaged knowledge development is a process and product of the interdependently linked social collective and organizational whole (Crossan et al., 1999; Jenkin, 2013; Senge, 2006; Senge et al., 2015).

Self Determination Theory

Self-determination theory (SDT) originated as a narrow theory of intrinsic motivation (Ryan & Deci, 2000) and in the last 20 years "has evolved to become a more general theory covering human motivation, personality development and wellness" (Ryan & Deci, 2019; pg.5). The theory is important to this OIP because motivations drive learning engagement and although most organizations use external motivators, intrinsic motivations are much more powerful (Nägele & Stalder, 2019). At the root level, SDT (Ryan & Deci, 2019) posits that these powerful intrinsic motivations are spurred by actively supporting three basic psychological needs for *competence*-mastering something meaningful, *relatedness*-feelings of belonging, and *autonomy*-freedom of choice. Empiric evidence supporting the validity of SDT is vast and repeatedly demonstrates that satisfying these needs greatly enhances intrinsic motivation important to increased OL engagement in addition to workplace well-being (Rigby & Ryan 2018; Ryan & Deci, 2019).

Both intrinsic and extrinsic motivations drive people to engage in learning but the influence each of these different motivators yield also depends on individual goal orientations (Ryan & Deci, 2000, Deci et al., 2017) or in other words, different purposes for wanting to learn. Individuals (or organizations) with primary learning goal orientations are intrinsically motivated by desire to grow knowledge, achieve task mastery, and self-actualize their human potential in reaching some desired purpose (Deci et al., 2017; Hirst, Van Knippenberg, & Zhou, 2009). In contrast, those with a performance goal orientation are more risk averse and motivated by achieving positive results or reaping extrinsic rewards such as praise, money, or symbolic status (Deci et al., 2017; Hirst, Van Knippenberg, & Zhou, 2009).

Self-determination theory then is an important lens helping frame and potentially appease the OL engagement problem. First, a proposed solution and leadership approach chosen to advance it should seek maximum fulfillment of SDT competence, relatedness, and autonomy needs, empirically identified as important to raising employee's intrinsic motivations (Rigby & Ryan 2018; Ryan & Deci, 2019) and thus OL engagement (Nägele & Stalder, 2019). Secondly, the theory calls for considering different employee goal orientation perspectives (i.e. learning versus performance oriented) and thus needing appropriate balance of both extrinsic and intrinsic reward results (Deci et al., 2017) coming from an OL engagement solution. Lastly, it is hard to deny the contrast between maximizing basic SDT needs fulfillment versus current realities of excess functionalist control and individualist OL-work culture already described as common to Organization X. Helping fulfill SDT needs of autonomy and relatedness appear promising venues to explore when attempting to address excess leadership control and decreased collaboration contributors to the OL engagement problem.

Why OL Engagement?

Organizational learning requires energy expenditure and supporting resources which are finite (Nägele & Stadler, 2019; Pasamar, Diaz-Fernandez, & de la Rosa-Navarro, 2019); therefore, attention to what these supports are and how they can be optimized are important to consider. Engagement can be viewed as an OL resource and is defined here as energized participatory immersion in learning that is evidenced through various cognitive, socio-relational, and behavioral efforts-actions (Azevedo, 2015; Henrie, Halverson, & Graham, 2015; Nägele & Stalder, 2019). Engagement involves keen focus, dedicated interest, curiosity and enjoyment in challenging situations where those who are engaged want to push themselves beyond basic requirements rather than idly stand by (Nägele & Stalder, 2019).

Drivers of OL engagement can include individual internal factors such as personality traits, intrinsically finding deep interest and meaningful purpose in one's work (Berg & Chung, 2008; Gerards, de Grip & Weustink, 2018; Kauppila, 2018; Ryan & Deci, 2019) or being primarily learning goal oriented (Deci et al., 2017; Hirst, Van Knippenberg, & Zhou, 2009). Socio-relational influences such as supportive managers and peer colleagues who provide frequent feedback, feel psychologically safe to do so, and mutually trust each other (Dahlin, Chuang, & Roulet, 2018; Garvin, Edmondson, & Gino, 2008; Gerards, de Grip and Weustink, 2018; Ng & Ahmad, 2018; Nguyen & Hansen, 2017; Skerlavaj, Connelly, Cerne & Dysvik, 2018) are also identified as important OL engagement antecedents. Lastly, extrinsic motivators such as performance recognition and monetary reward systems are also cited as positive OL engagement influences (Berg & Chung, 2008; Hirst, Van Knippenberg, & Zhou, 2009; Deci et al., 2017). Cognitive, socio-relational, and behavioral engagement indicators will be important to consider alongside the theoretical frames, proposed solutions, and leadership approaches used in this OIP. Similarly, it is essential that these indicators are also captured in measurement tools and the evaluation strategy determining whether OL engagement improvements have occurred.

OL Exploitation and Exploration

OL can have both knowledge explorative and exploitive purposes (March, 1991; Jenkin 2013); however, these equally important pursuits serve competing interests that are important to highlight in this OIP. Jenkin (2013) highlights these different exploratory-exploitive learning purposes in extensions to the 4i framework claiming that both intuiting and interpreting steps are intentionally driven by either an exploitive or exploratory learning goal. Choosing to even seek out or feed forward information (i.e. OL engage) depends on the degree to which individuals believe these goals will be valued by others (Jenkin (2013). Learning purposes are hotly debated

given different political vantages or ideology (Feldman & Johnston, 2014; Gutteck, 1997; Smith, 2005) and at the heart of the debate lies whether to either improve performance by refining what is already known (knowledge exploitation) versus knowledge exploration efforts that seek out learning to grow, feed it forward, experiment and innovate (Crossan et al, 1999; Jenkin, 2013; March, 1991).

Conservative views of educational purpose value traditional learnings to guide the status quo future and recommend that education (e.g. OL) focus on skills or knowledge as applicable to the current roles-responsibilities of specifically designated class divisions (Feldman & Johnston, 2014; Gutteck, 1997; Smith, 2005). The conservative view then is closely linked to the desired OL purpose of knowledge exploitation and tied to optimizing employee performance.

In contrast, liberal stances posit education should cultivate broad awareness, vantage points and abilities; all important for realizing collective social and community benefit (Freedman, 2012; Raven, 2005; Schneider, 2004). Education in the liberal view has an emancipatory effect where knowledge exploration takes individuals beyond current contextual realities and towards potential job promotion or societal citizenship (Freedman, 2012; Raven, 2005; Schneider, 2004). The liberal view then is closely linked to the OL purpose of knowledge exploration, growth, and innovation. As previously mentioned, conservative control and therefore knowledge exploitation to improve performance is currently emphasized over explorative learning pursuits in leadership, structural, and cultural OL processes at Organization X.

Acknowledging the benefits of both these competing interests and a need to achieve balance between exploitative and explorative learning is important to this OIP's OL engagement strategy. First, pure conservative views of OL mentioned to promote only fixed status quo skills

development do not adequately address an employee's need to also adapt to current realities of rapidly changing, increasingly interdependent, and uncertain work demands (Amy, 2007; Heslin & Keating, 2017; Joiner & Josephs, 2006). Also, exploitive only learning emphasis does not align with Organization X's mission as it relates to effectively meeting competency demands of being a global leader. These global leadership requirements include dual needs of breaking innovative ground *and* optimizing current status quo processes (Cumberland, Herd, Alagaraja, & Kerrick, 2016; Elkington, Pearse, Moss, Van der Steege, & Martin, 2017). Needing explorative learning growth opportunities in addition to exploitive OL is also key to influencing OL engagement. Exploitive-explorative OL differences and how these are favored and engaged in more frequently depending on performance versus learning goal oriented employee types (Deci et al., 2017; Hirst, Van Knippenberg, & Zhou, 2009) are identified as important to balance in this OIP.

Conceptual-Theoretical Framing Summary

In summary, this OIP is framed from a plural vantage using the main philosophic lenses of pragmatism and social constructivism which closely align with the OL theories and self-determination theory mentioned. Next paragraphs describe why this integrated theoretical approach to the POP is important. First, pragmatism and social constructivism appreciate but expand upon positivist truth assumptions by valuing that knowledge also evolves through experience, human social relations, and interaction with the environment (Elkjauer & Simpson, 2011; Thomas et al., 2014). These worldviews are essential to challenging functionalist-conservative approaches found to be dominant and mentioned as contributing factors to the current OL engagement problem. These pluralistic and action oriented ways of thinking-being

are also better aligned with the meaningful application of OL to pertinent organizational challenges and engagement focus of the OIP.

Second, the 4i and Fifth discipline OL theories discussed also challenge functionalist and individualist only OL priorities-approaches such as those described as problematic at Organization X. They do so through systems integrated thinking, where socio-relational knowledge generation, collectively sharing knowledge, and applying it are deemed more important than individualized cognition or performance and OL structure (Crossan et al.,1999; Jenkin, 2013; Senge, 2006; Senge et al., 2015). Similarly, extensions to the 4i framework also consider issues of power, politics, and goal motivations for information foraging which are all said to influence the social engagement energy required to mobilize OL both vertically up and horizontally across organizational levels (Jenkin, 2013; Lawrence, Mauws, Dyck, & Kleysen, 2005). These theories will be significant in mobilizing proposed OIP solutions that must aim to alleviate the current structural challenges of siloed work practices and thus limited collaborative OL engagement happening across departmental boundaries.

Lastly, OL is important to the success and survival of organizations and it is argued here that promoting high employee engagement with it can provide a perpetuating resource and is prerequisite to optimizing OL practices at Organization X. The information and knowledge expansion era we currently live in precipitates organizational change happening with increasing dynamic speed, intensity and impact (Scott, 2011). Therefore, organizations and employees working within them cannot only rely on exploitive OL that overemphasizes performance within current vocational skillsets or existing employee roles. This exploitive learning over emphasis at Organization X was highlighted in PA policy-process analysis and also described as problematic for managers who are expected to carry the burden of engaged OL on their own. Instead, it was

argued that OL must be balanced with more explorative opportunities that help fulfill important psychological needs, build employee agility, adaptive flexibility, and moral citizenship all necessary to face difficult future challenges not yet apparent but certain to come (Holboea et al., 2019). Active attention to building this human capital (Pasamar, Diaz-Fernandez, & de la Rosa-Navarro, 2019) employee learning development, psychological fulfillment and well-being (Ryan & Deci, 2019) rather than continue to merely exploit and settle for what is required today, are keys to understanding the purpose of this OIP and why OL engagement change at Organization X is necessary.

The next sections of the OIP goes on to elicit important questions deemed necessary to addressing the OL engagement problem as well as detailing the collaborative leadership vision of Organization X's desired future state.

Guiding Questions Emerging from the Problem of Practice

Although organizational learning (OL) inquiry and practice interest has grown exponentially in the last 30 years (Basten & Haamann, 2018) many unknowns and unanswered questions specific to this OIP remain. For example, there are practice based uncertainties given little is synthesized about the many different OL activities that are possible (Basten & Haamann, 2018), let alone how best to choose, operationalize, and evaluate OL activities for ongoing quality improvements (Duffield & Whitty, 2015; Xie, 2019). This leads to the guiding question of *what OL practice solution shows the most promise for improving OL engagement given the environmental context of Organization X?* Also, learning engagement is complex, diversely defined, incompletely understood, and therefore difficult to rigorously measure (Azevedo, 2015). Thus, determining *how specific empirical drivers of it can be meaningfully and comprehensively integrated into an OL strategy* is an important question in this OIP.

Transformational leadership is the most frequently studied and cited means said to positively influence OL motivations (Xie, 2019). This emphasis however, narrowly targets a formal leadership audience and has thus left other follower-centric theories such as team and authentic leadership largely unexamined (Koeslag-Kreunen, Van den Bossche, Hoven, Van der Klink, & Gijsselaers, 2018; Yukl, 2009). This gap and informal positioning of this OIP author raises the guiding questions of *how informal authentic and team leadership approaches can effectively influence a higher OL engagement state at Organization X?*

Lastly, although team learning is mentioned as integral to OL success (Rebelo et al., 2019; Senge, 2006) specific team leadership behaviors influencing this collective learning capacity are scantily described in the OL literature (Koeslag-Kreunen et al., 2018; Reid & Dold, 2018). However, expansive research on teamwork and team leadership conducted outside the OL domain (e.g. healthcare) appears to provide promising directions to help fill this OL engagement team leadership and learning void (Rebelo et al., 2019). Therefore, determining *what specific team leadership behaviors and team processes can help drive engaged OL at organization X?* is another salient point of inquiry. These guiding questions are all deemed necessary to investigate and answer throughout the remainder of this OIP.

Remaining sections of this chapter use the organizational context, this leader's situation, and lenses described to view the problem thus far to articulate a desired visionary high OL engagement state. The chapter concludes with assessing Organization X's readiness to move towards this change and ends with discussion about ways to overcome possible barriers towards a more readied state.

Leadership Focused Vision for Change

Factors creating a gap between the current state and a future vision of what Organization X requires and aspires to be are highlighted here. First, these gaps include organizational mission-vision-values incongruence with existing OL purposes and practices as well as misalignment between Organization X's current OL strategy and new holistic education expectancies heavily influencing the organizational environment (i.e. CanMEDS competency framework). Secondly, there is also an imbalance between the current focus on exploitive learning and leadership control of OL versus more explorative, collaborative learning application needs at Organization X. Important to this last gap is a need to equally appease intrinsic-extrinsic motivators driving the OL engagement of performance goal oriented employees and the organization, with motivations important to those identifying with primary learning and development goal orientations. Lastly, an OL engagement solution and leadership approaches chosen to advance it should seek to fulfill all employees' needs for autonomy, competence, and relatedness which are important to driving intrinsic motivations (Ryan & Deci, 2019) and thus actively engage in OL on a greater organizational scale (Nägele & Stadler, 2019).

Keidel (2005) asserts that autonomy, cooperation, and control be balanced in strategic visioning and highlights that leadership often fails by either limiting attention to one of these needs or narrowly focussing on only two priorities in "two variable design" (p. 21). This two variable fixation is witnessed in Organization X's practice of exercising high departmental individuality when working towards broad goal achievements and also reinforcing conservative control over individual employee's working and learning practices. These autonomy and control priorities overshadow the cooperation element necessary to mobilize greater frontline OL engagement. Cooperation at Organization X is currently a non-priority and this is concerning

given that collaboration is collectively determined to be an important organizational value. In a similar vein, it certainly also leaves the important need for belonging and relatedness (Ryan & Deci, 2019) unfulfilled. A more balanced cooperative-autonomous-controlled approach to OL strategy closely aligned with collective values (i.e. collaboration, respect) and basic needs can lead to internalization of change goals (Fairholm, 2009) and help mobilize the high OL engagement vision.

Ideas that sustainable change visions require big picture systems thinkers (Fairholm, 2009; Senge et al., 2015) who maintain commitment to enabling broad leadership capacity and goals of frontline practitioners (Fullan, 2006; Goodson, 2001, Senge, 2006) also resonates throughout this OIP. Team leadership aligns with these ideals where formal leaders influence a group to achieve common goals, but also how goal achievements manifest through dynamic influence exercised by followers in a distributed power sharing process (Day et al., 2004; Lingard, 2016). Building this distributive capacity or “long lever of leadership” (Fullan, 2006; p. 121) also requires authentic leader’s at all organizational levels. These leaders, who seek to openly share information, actively listen to, and build trust with one another (George, 2015), can promote an OL high engagement change to ripple throughout the organizational system.

Authentic and team leaders who share a performance improvement focus but also value learning growth and development of themselves-others can enable OL engagement culture change long term. In this light, sustainability of the OL engagement change vision refers to more than simple staying power; it demands a need for continuous improvement without impeding and, more importantly, strongly supporting the desired needs, goals, values and strength of all others (Fullan, 2006; Senge et al., 2015).

The leadership vision for change in this OIP is summarized as: a future organizational learning state where all employees are mutually inspired, motivated, supported, expected, and committed to lifelong learning excellence and the routine sharing and application of this knowledge for collective (i.e. organizational and individual) improvement. Achieving this OL high engagement vision requires systems integrated thinking, pluralistic theoretical views about learning, and a balanced exploitive-explorative employee learning and development purpose. Sustained frontline OL engagement further requires internal and external motivation emphasis as well as aligned structural supports that continually reinforce and reward engaged OL cultural practices. Importantly, this vision demands collectively appreciating the many different informal and formal OL processes possible, coupled with dual leadership facilitators (both management and peer guided) that can help successfully drive engagement with them.

Change Drivers

Siloed and hierarchal work organization that limits collaborative OL practices and therefore learning engagement between offices at Organization X is a concerning and important driver of change. Akin to indicators of poor team performance (Cardinal & Brindley, 2017; O'Neill & Salas, 2018) limited cooperative OL practices at Organization X result in diminished vertical-lateral communication quality and low collective situational awareness which in turn lead to duplicated work efforts and wasted resources. One case example highlighting these ill-effects was witnessed when different units within the same office developed strikingly topic similar 18 month education projects without either group communicating or even knowing what the other was doing. This poor inter-team task and resource allocation (Cardinal & Brindley, 2017) resulted in unnecessary workload where content writing, communications-marketing plans, and evaluation strategies were duplicated for two products with common organizational

goals. This wasted workload and missed opportunity for collaborative OL synergy is an especially relevant change driver given previously presented data showing many employees at Organization X are overworked and at risk of burnout. Conversely, although overdoing cooperation in strategic visioning is the least frequent organizational failure, it can still occur (Keidel, 2005). Thus, change agents seeking to increase cooperation in OL engagement balance and who value team leadership enablers of it, should not forget that control, structured decision making, and autonomy also bring value to the OL visioning mix.

The proposed high OL engagement vision is also complimentary and interconnected to a change initiative known as the Comprehensive Health Initiative (CHI) currently being championed by senior leadership at Organization X. This initiative can provide the OIP with synergy, help with evaluative metrics, and also assist as a driver to the proposed OL engagement change. The CHI aims to improve the overall wellbeing of employees through the four total health pillars of physical, mental, work, and life balance (Org X, 2019). These 4 foundational pillars and the 13 factors being measured as necessary to achieve them share many similarities with drivers of OL engagement, principles-practices of team and authentic leadership, and 4i and Fifth discipline OL theories previously described. These integrated overlaps include trust building between employees, improving job productivity and motivation by providing staff with tools (i.e OL shared knowledge) needed to do their work, and improving psychological safety (Org X, 2019). Lastly, the CHI also aims to improve communication as evidenced by open-transparency, honesty, and soliciting different viewpoints-input from all staff (Org X, 2019). Relationships between CHI survey metrics and factors important to improving OL engagement are hard to deny. These relationships or shared visioning (Senge, 2006; Senge et al., 2015) are

important to recognize in the proposed OL engagement change because value is collectively determined and change results collectively beneficial.

The first chapter concludes with an assessment of Organization X's readiness to move towards this high OL engagement change and includes discussion about ways to overcome possible barriers towards a more readied state.

Organizational Change Readiness

Determining change readiness for higher OL engagement at Organization X involved the use of a quantitative assessment tool (Cawsey, Deszca, & Ingols, 2016). Answering questions from this tool resulted in a cumulative score of 18 in a possible range of -10 (extreme unreadiness) to 35 points (high predisposition to change readiness). This indicates that Organization X is below the readiness tipping point for the increased organizational learning engagement change. The remainder of this section focusses on specific concerns and potential barriers noted within this assessment that require momentum building efforts to enable a more readied state. Of note, describing how to overcome some barriers identified in this section is not yet possible without first considering, defining, and mobilizing OL engagement solutions that can traverse them.

Barriers to change involve active and passive forms of resistance that can be categorized into personal, organizational, and factors specific to the change itself (Rosenburg & Mosca, 2011). Table 1 below highlights identified barriers within these categories, the 4i OL framework processes of intuiting, interpreting, integrating, institutionalizing (Crossan et al., 1999)) and power influences on the 4i levels (Jenkin, 2013; Lawrence, Mauws, Dyck, & Kleysen, 2005). The table also elicits other internal-external environmental forces potentially shaping this OL engagement change and state of readiness.

Table 1.

Integrated Barriers to OL engagement at Organization X

4i OL framework component and level	OL engagement barrier aligned with OIP analysis and internal data
Intuiting (Individual)	<p>Frontline bias-deficiencies recognizing themselves or their role as important for information collection and processing (sensing)</p> <p>High stress-workload</p> <p>Low intrinsic motivation driving OL</p> <p>Restrictive management practices emphasizing control over information and its flow</p> <p>Frontline perceptions that OL effectiveness is not my responsibility-it's a management problem.</p> <p>Implicit knowledge held difficult to communicate-mobilize in written-spoken forms</p>
Interpreting (Individual and team)	<p>Low confidence, status, or trust in the knowledge keeper</p> <p>Fear to lose control of knowledge and power that possessing it has</p> <p>Diminished capacity of groups to absorb, retain, or use new knowledge (time pressures-workload)</p> <p>Sole focus on extrinsic reward for performance and failure avoidance group culture</p>
Integrating (Cross boundary)	<p>Lack of recognition for explorative learning, fear of punishment</p> <p>Overconfidence given some success with past practices</p> <p>Time pressures-workload</p> <p>Little expectation of collaborative OL and resulting poor communication between individuals or team units</p> <p>Perceived incompatibility between OL and existing</p>

	organizational structure-work culture
Institutionalization (organization)	Low accountability to track and feed forward OL
	Inadequate frontline leadership skills to transcend vertical- horizontal boundaries
	Status quo maintenance mindset results in low degree of openness to new ideas

High workload demands are mentioned as a common barrier to change readiness (Rosenburg & Mosca, 2011) and current workplace health and wellness data at Organization X suggests that both frontline employees and managers are overworked (Org X, 2019). Thus, internal stakeholders may not believe they have capacity to participate in their professional development or implement any meaningful OL engagement changes at all. Rather than strongly oppose this resistance, these views should be discussed openly, and even thought of as valuable potential ammunition for having change more readily supported (Cawsey et al., 2016). For example, highlighting potential operations efficiencies and creative synergy made possible from engaged organizational learning within teams and across departments can strengthen the argument for why change is necessary now. Further, mentioning how poor OL engagement at all organizational levels may actually be contributing to stress, workload concerns, and poor performance can provide momentum to a more readied state of change acceptance.

Trust in leaders is also important to change readiness (Cawsey et al., 2016) and CHI data suggests that employee trust in senior management is considerably lower than industry comparators (Org X, 2019). Therefore, fresh ideas like improving OL engagement proposed by authentic and team inspired leaders without legitimate power may be afforded trust advantages that current formal leaders do not have. First, this OIP and change vision could provide for cognitive trust building born from belief in another's ability and competence (Louis & Murphy,

2017) given the well informed doctorate level expert inquiry into the OL engagement topic.

Also, affective trust building or belief that someone is acting in the best interest of others rather than just themselves (Louis & Murphy, 2017) can result, given the OL engagement change will be perceived as grassroots rather than top down driven, leading to decreased possible cynicism or skepticism from other frontline employees about it (Cawsey et al., 2016). Having already successfully lived through the PD funding approval process also lends to an authentic, committed, and affective trustworthy purpose of this change vision message, which aims to benefit the collective rather than serve some perceived individual or corporate self-interest.

Given this author's non-formal leadership position, continuing to inform and garner support from those with high level decision making power, especially executives who are CHI champions is an important change readiness catalyst. Very active efforts at approaching these decision makers for EdD financial support, approval for internal data use, discussing the OL engagement topic with them, and attentively listening to and addressing their concerns raised in early OIP planning-development is important to building change readiness. Such early active efforts and communication can again build both cognitive and affective trust from these leaders in the competent ability and caring commitment of frontline followers to successfully help drive important organizational changes.

Other readiness obstacles to enacting the OL engagement change will be the siloed work structure, and functionalist, conservatively dominant status quo leadership culture at Organization X. As was described, leadership culture promotes excess OL control with primary exploitive and performance based purposes and maintains autonomous interdepartmental OL work operations. Tendency towards stagnation is mentioned across many change models (Cawsey et al., 2016) and organizational complacency rather than explorative growth mindsets

are also cited as significant barriers to realizing change success (Kotter, 1997; Rosenberg & Mosca, 2011). Morgan (2006) similarly warns against overconfidence in status quo practices and dangerous “psychic prison” (p. 226) mentality where unconscious, collectively stagnant, and agreeable mindsets dissuade potential for organizational learning and positive renewal.

Organization X is currently heeding this warning by honestly examining itself, broadly communicating the state of employee affairs with CHI survey data, and appears committed and ready to improve upon these concerns by doing things differently. In other words, internal data suggesting that managers need help and employees are currently in health crisis, unhappy with excess control over their working, learning and career development needs (Org X, 2019) and therefore disengaged in OL is receiving attention. Improving change readiness will involve communicating that a renewed OL engagement strategy challenges complacent thinking and can potentially help move many challenging CHI initiative metrics to the positive upside. Further, maintaining that high OL engagement itself enables a more agile, capable and readied organizational state that pushes explorative boundaries *and* performs well in the face of challenges can help ready the organization to move forward with this proposed change.

In closing, building clear and shared leadership vision while improving collective readiness for change requires high effort and attention to all contextual variables in the organizational environment. Thoughtfully addressing these internal-external factors shaping change while considering feasibility and long-term sustainability is essential so hard work is not done in vain. As Fullan (2006) mentions though, successful change is not only achieved by challenging, stimulating, and purposeful work but also through periods of rest that allow time for energy levels to replenish and new breakthroughs to emerge. To this end, patience is as

important as perseverance for Organization X to be ready and for this OL engagement change to succeed.

This first chapter highlights that conservative ideology, functionalist control and high departmental individualism is dominant and heavily influences environmental context, structure, existing OL supports, and cultural learning-work practices at Organization X. Formal leaders are primary gatekeepers deciding which OL goals to pursue in relation to existing vocational roles, siloed work expectations, and an exploitive versus explorative learning growth emphasis. Formal leaders are also struggling but still expected to be sole catalysts motivating their employees to engage in lifelong learning that is important for both employee development and achieving organizational goals.

The next chapter expands upon team and authentic leadership approaches used to propel necessary collaborative, less controlling, pragmatic and balanced exploitive-explorative learning changes needed to increase OL engagement at Organization X.

Chapter 2: Planning and Development

This chapter of the OIP continues to elicit evidenced based congruent frames, and presents possibilities and sound rationale for an appropriately combined OL engagement solution. Authentic and team leadership approaches mobilizing change are also further defined with specific attention to how behaviors underpinning these approaches are complimentary and enable necessary fifth discipline (Senge, 2006) and psychological need fulfillment conditions leading to high OL engagement. The pluralistic change management strategy used to address the problem is discussed in connection to pragmatic and social constructivist lenses which help inform it. The chapter concludes with a discussion of ethical concerns surrounding the engagement problem and how a renewed focus on balanced character virtues and collective accountability can provide a more ethical leadership approach to solution and holistic benefit to all.

Leadership Approaches to Change

Team leadership of engaged organizational learning was defined in this OIP as a collectively distributed influential process simultaneously enabled by empowered formal leaders and followers (Koeslag-Kreunen et al., 2018). This leadership is “an emergent event, an outcome of relational interactions among agents...that transcends the capabilities of individuals alone; it is the product of interaction, tension, and exchange rules governing changes in perceptions and understanding” (Lichtenstein et al., 2006, pp. 1-2). Teams do require vertical leadership for priority goal setting, decision making, and resource allocation however; responsibility for determining and successfully executing these processes does not fall solely on formally positioned individuals alone (Koeslag-Kreunen et al., 2018; Salas et al., 2005). Expected team behaviour includes that *all* team members clarify goals if uncertain and openly voice concerns

with information or leadership decisions when they are perceived as wrong or obstacles to collective goal achievement (Koeslag-Kreunen et al., 2018; Salas et al., 2005). In essence, team leadership involves more than conservative control and following formal leadership directions blindly, it demands everyone asserting an active engaged role, sharing responsibility for and holding each other accountable for team outcomes (Koeslag-Kreunen et al., 2018; Salas et al., 2005).

Research suggests teams are better able than individuals to integrate diverse knowledge-skills when analysing tasks and that this successful knowledge integration leads to superior performance and speedier innovations (Barley, Treem, & Kuhn, 2018; Koeslag-Kreunen et al., 2018; Rebelo et al., 2019). These dual exploitive-explorative learning benefits achieved through team learning require practices of *mutual monitoring* where members need to understand the interdependent individual roles and skillsets of others, observe these in some problem based task action, and provide corrective or constructive feedback as necessary (Salas et al., 2005). High reliability teams quickly learn and adapt to resource requirements needed in changing environments (Koeslag-Kreunen et al., 2018) and do so through *back-up behaviour* that involves members *mutually monitoring* and actively stepping in to fill information, skill, or workload capacity voids when looking out for and helping each other (Salas et al., 2005). Open, honest, and direct *communication* practices allows for robust information exchange that helps build collective situational awareness about environmental cues influencing team problems (Rebelo et al., 2019; Salas et al., 2005).

Excellent team communication leading to improved situational awareness is common to fifth discipline OL enablers of systems thinking and shared mental models (Rebelo et al., 2019; Senge, 2006). In turn this communication and awareness helps develop *shared mental models*

about required tasks, skills, or resources needed to approach issues and overcome them (Senge, 2006; Salas, Cooke, & Rosen, 2008; Salas et al., 2005). Information sharing promotes deeper individual and collective situational awareness that allows everyone on a team to potentially anticipate or clarify what should be done next or even project what may happen in the future (Salas et al., 2005). As information sharing, situational awareness, and collective sense-making are encouraged in team learning practices, important pieces to problems are voiced and subsequently used or addressed, and the team's ability to solve the issue, enhanced (Rebelo et al., 2019).

Maintaining an environment of trust, psychological safety, mutual respect, and resolving conflict also improve team performance (O'Neill & Salas, 2018; Salas et al., 2005) and are similarly essential to effective leadership that enables team learning (Koeslag-Kreunen et al., 2018; Rebelo et al., 2019). Leading this safe and supportive team learning environment demands that all members use assertive yet non-threatening and non-judgemental communication strategies (Koeslag-Kreunen et al., 2018; McKeon, Cunningham, & Oswaks, 2009). Higher levels of mutual trust and psychological safety then evolve without fear of consequences for openly sharing opinions, looking incompetent by asking questions, and through belief that everyone is acting and performing in a team's best interests (Koeslag-Kreunen et al., 2018; Salas et al., 2005). These high reliability team practices and leadership of engaging learning environments also share complimentary trust and psychological safety goals targeted in the organizations CHI initiative (Org. X, 2019) and mentioned as an important driver of change.

In summary, learning engagement change influenced through team leadership and its expected co-influencing behaviors not only signal actively engaged OL, they can be used to enable Fifth discipline (Senge, 2006) and psychological need fulfillment conditions deemed

important to nurturing it (Ryan & Deci, 2019). First, team leadership does so by minimizing conservative control and individualistic leader approaches mentioned as problematic to highly engaging employees in OL on their own. Instead, this leadership renders an increased collective capacity to sense important information, relay it in open communication with others, interpret it as important together, and effectively utilize this new knowledge in problem solving efforts by the whole team or organization (Senge, 2006; Senge et al., 2015; Salas et al., 2005). Secondly, high performance teamwork improves learning quality and this enhanced collective capacity to learn and apply knowledge effectively (Bell, Kozlowski, & Blawath, 2012; Koeslag-Kreunen et al., 2018; Salas et al., 2005) also supports psychologic needs fulfillment essential to high engagement. Autonomy, competence, and belonging needs are fueled in part through team demands for collective input into decision making, improved learning and performance outcomes and in effect improved capabilities made more possible by learning through team leadership together. Promoting these learning collective and autonomous possibilities enacted in group effort is particularly important given the limited collaborative OL engagement and leadership control currently happening within and across departmental boundaries. Team learning and leadership practices are difficult to see or perhaps non-existent in Organization X's OL-work culture where individual exploitive learning and performance is primarily encouraged.

It is essential then that team leadership learning excellence and its need fulfilling potential also be used or embedded in a chosen solution. This solution should also build competence, balance control, autonomy, and collaboration needs (Ryan & Deci, 2019) and value that knowledge important to organizational problem solving or employee growth is not only important from positioned leaders, but also vital and to be encouraged from supportive followers.

Authentic Complements to Team Leadership

Authentic leaders are guided by self-awareness, relational transparency, and an internalized moral compass (Avolio et al., 2009; Banks et al., 2016; George, 2015) which is informed by reflective life experiences and openly expressing these personal narratives (Gardner, Cogliser, Davis, & Dickens, 2011; George, 2015). Open sharing of experiential dialogue and personal reflections are concrete examples of behaviorally and socio-relationally engaged OL practices that can also serve to validate or contradict dominant mental model ways of Fifth discipline thinking and doing (Senge, 2006; Rebelo et al., 2019). The openness and transparency of authentic leaders' contributions to problem-based group dialogue also improves robustness of these conversations and resulting quality of OL as well (Mazutis & Slawinski, 2007; Rebelo et al., 2019).

OL engagement can manifest by actively sharing such transparent narrative experiences about educational project work with others in a team setting. Collective OL engagement materializes further through team dialogue (Senge, 2006; Rebelo et al., 2019) when experiences presented are similar or perhaps different from other group member's successes, errors, and failures in similar project work. Continual information sharing and honest discussion thus also creates new knowledge through the relational learning environment and social constructivist teaching of others (Thomas et al., 2014). Thinking about a particular work problem, its contributors, and openly discussing what has or has not worked well before through AL practices (Mazutis & Slawinski, 2007) facilitates essential 4i OL steps of interpretation and integration (Crossan et al., 1999; Jenkin, 2013) or as Senge (2006) asserts, truth seeking behavior necessary for personal mastery and shared mental models to develop.

Role modelling and holding others accountable to shared values or standards is important to authentic leaders (George, 2015; Mazutis & Slawinski, 2007) and meeting such standards (e.g. organizational values or team ground rules) will also be important to improving OL engagement. For example, optimal team learning engaged environments expect conflict but require disagreements to be negotiated constructively by adhering to standards of mutual respect, psychological safety, and trust (Garvin, Edmondson, & Gino, 2008; Holboea et al., 2019; Koeslag-Kreunen et al., 2018; Salas et al., 2005). Respectfully censuring team members when violating these standards can aid adherence to these collective team values. Infusing OL processes with such established collective standards improves OL engagement, and respectfully holding organizational stakeholders accountable to meeting them, requires relational ability informed by authentic leadership.

In closing, authentic leadership shares commonalities with team leadership theory, but its practices offer more prescriptive means to create effective team learning environments. For example, authentic leader's role-model but also foster mutual reciprocation of trust, back-up behaviour, open communication and psychological safety through their leadership practices (George, 2015; Mazutis & Slawinski, 2007). Also, due to consistent value integration across environments and situations (George, 2015) authentic leaders role model value and team goal alignment for others. Thus, authentic leadership compliments team leadership by helping build optimal learning environments and also encourages positive team behaviours necessary for team learning and fully engaged OL to take place.

This next section of the OIP describes a contextual complexity infused descriptive representation of Kotter's (1996) model as applied to the OL engagement change. This re-

interpreted framework provides for both practical guidance and pragmatic, social constructivist understandings about how change via the chosen leadership approaches can be led.

Framework for Leading the Change Process

Organizational learning is described as an emergent-complex change (Evans, Thornton, & Usinger, 2012; Lichtenstein, 1997); however, literature on the topic often lacks inclusive or prescriptive directions about how OL change is actually led (Koeslag-Kreunen et al., 2018; Vera & Crossan, 2004). This is problematic given that the need to maintain systematic and purposeful learning processes is important for OL engagement to succeed (Garvin et al., 2008) and the pragmatic practice-based intent of this OIP. Lacking specific change implementation directions, Kotter's (1996) 8 step framework is used here to help outline how OL engagement gaps can be systematically analysed, as well as logically communicated and understood. These gaps will also subsequently inform eventual solutions that can be feasibly envisioned, planned for, and eventually mobilized. A pragmatic lens helps inform this author's view about the need to have some objective logical understanding about change and how to lead it, while simultaneously appreciating that change and its human mobilization are also impacted by important contextual factors and situational complexity occurring within a dynamic organizational environment (Campbell, 2015; Elkjauer & Simpson, 2011; Mead, 1913).

Kotter's (1996) framework includes establishing urgency, building guiding coalitions, developing and communicating clearly shared vision, empowering people to act, creating small short term wins, building on these gains, and institutionalizing change (Appelbaum, Habashy, Malo, & Shafiq, 2012). Later in this chapter, these steps are used to pragmatically map necessary OL engagement change actions required. Details in subsequent paragraphs also describe Kotter's steps as complex, emergent, and interdependently influenced by context rather than simple,

linear and completed sequentially. Social constructivist views apply to reasons for doing so because humans learning to evolve and lead themselves out of problems together requires appreciating contextual influences and then actively shaping environmental conditions to which they collectively want to be a part (Mackenzie & Knipe, 2006; Senge, 2006; Thomas et al., 2014).

Arguing for complexity informed theoretical approaches to change, many elicit concerns with the way some change models, like Kotter's (1996) 8 steps, are linear, simplistic, prescriptive, and top-down driven, which all contradict data describing lived experiences with change and the differentiated ways which it can happen (Higgs & Rowland, 2005; Lichtenstein, 1997). Although Kotter's (1996) model is presented as linear, I challenge critical assertions that the framework lacks contextual consideration, is sequentially simple, or that change is only driven from the top. In fact, modern interpretations of the model describe successful change as one of the most difficult, dangerous, and contextually complex organizational management issues (Kotter & Schlesinger, 2008) and that change success requires buy-in from, and empowerment of, many agents, not simply that of the formal leadership hierarchy (Kotter, 2014; Kotter, & Schlesinger, 2008). These more modern interpretations actually support change complexity theory, and the empirical findings of Higgs and Rowland (2015) that directive, formally-led leadership approaches to change are the least successful.

Kotter (1996) claims that his first 4 steps (a) establishing urgency; (b) build guiding coalition; (c) develop; and (d) communicate clearly shared vision are all about preparing fertile ground for change. Although presented as linear, he asserts that these steps could have been combined, that change happens unpredictably, and agents in the process are often immersed in and working multiple steps at once (Finnie & Norris, 1997). The model was initially presented in

sequence based on Kotter's vast experience with change agents and observations that they frequently try to skip steps, pay insufficient time to necessary groundwork foundations, or jump right to policy writing first in attempts to immediately institutionalize change (Finnie & Norris, 1997). In other words, change step linearity was primarily meant to emphasize necessary integration, interdependence and a need to visit all steps, not necessarily prescribe exact sequence in which the steps must be completed. In essence, I argue that the integrated and interdependent steps of Kotter's (1996) change model are better envisioned as system components more accurately represented in a complex relational matrix where steps are complimentary and revisited through change stages. A situational and contextual complexity infused visual representation of Kotter's (1996) model as applied to this OL engagement change and leadership enablers are displayed in Figure 1 at the end of this section. This figure provides for some practical guidance and pragmatic understanding about how change materializes via leadership, but also how OL engagement change is lead through social constructivist learning where people are collectively influenced by and shape their environment.

Given the limited success of most organizational change initiatives (Higgs & Rowland, 2005; Kotter & Schlesinger, 2008), it appears that any framework chosen to guide change has limitations. This is true whether selecting an approach for its more easily communicated and logically comprehended value or, like others (e.g. Higgs & Rowland, 2005; Lichtenstein, 1997), choosing frameworks based on sole belief that change only happens by unstructured chaos, miracles, or other ambiguous magical phenomena unsupported by robust evidence.

Regardless of the model chosen, it appears that the leadership approach and way a problem is framed (Higgs & Rowland, 2005) given the situational, organizational, and contextual factors surrounding change (Kotter & Schlesinger, 2008; Lichtenstein, 1997) are more important

than any specific choice of framework itself. Presenting a recognized functionalist change approach like Kotter's (1996) model infused with emergent-complexity principles is more likely to resonate with formal conservative decision makers at Organization X. Using functionalist language to understand and communicate change, helps ensure cooperation-collaboration finds balance with the current controlling-autonomous approach (Keidel, 2005) to OL engagement, and that this OIP is embraced, rather than resisted.

Emergent-complex change frameworks may be difficult to quantitatively prove, articulate, or operationalize into practice; however, there are important ideas within them for a pragmatic, informal change leader, focussed on OL engagement and using Kotter's (1996) model to consider. Emergent change involves intuitive observation and pattern sensing, where these patterns are viewed either as barriers or opportunities, with subsequent actions taken if change is deemed necessary and when opportunities arise (Higgs & Rowland, 2005; Lichtenstein, 1997). This idea of change emergence closely follows 4i OL theory processes of intuition, interpretation, and integration (Crossan et al., 1999; Jenkin, 2013) but also explains how this POP was conceptualized, refined, and then diplomatically framed in context of a legitimate power imbalance so it could be pursued with agency. Complex change is also guided by collective ground rules or general principles and best enabled through gradual, repeated and momentum building patterns of action starting at the organizational outskirts rather than being simply top down directed by formal leaders (Higgs & Rowland, 2005; Senge, 2013). These assumptions correspond to having shared organizational values such as collaboration, and common ground rules needed for supportive OL environments like mutual trust-respect and open communication all facilitated by team and authentic leadership behaviours which help enable more engaged OL practices. Lastly, ideas that more than just formal leaders are needed to effect

change is consistent with this author's position of lateral influence and belief that concerted rather than sole managerial efforts are required to engage employees in organizational learning.

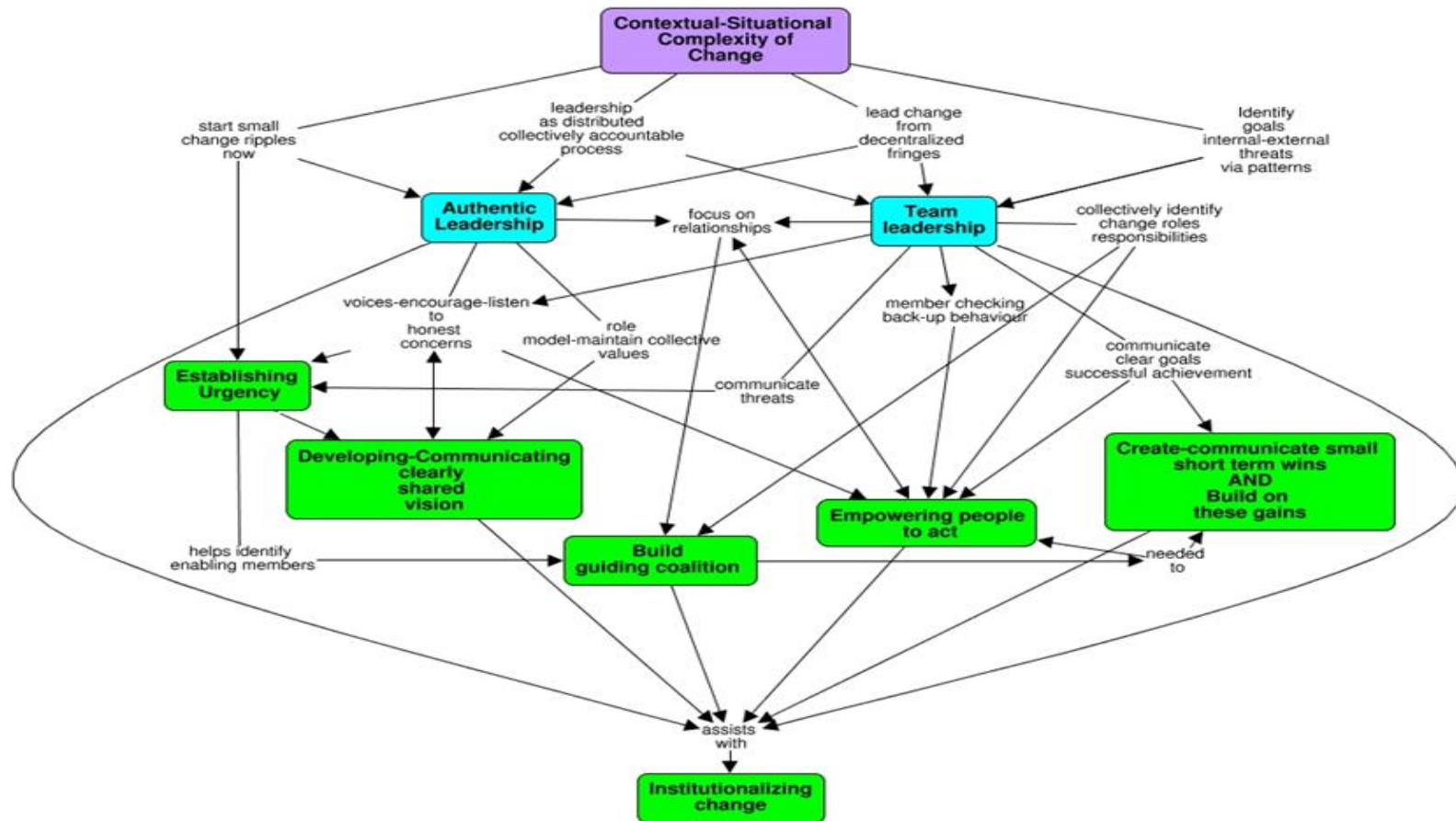


Figure 1. Complexity applied to Kotter's change model.

This figure illustrates how emergent-complex OL engagement change aligns with chosen leadership approaches and how leadership behaviors facilitating OL engagement can also map to multiple change model steps. The figure also depicts Kotter's steps as interdependent, inter-related and sometimes completed concurrently rather than in rigid sequence. Steps can also be tackled repeatedly using multiple strategies as small change is initiated and evolves over time.

The next section considers multiple contextual factors within the organizational environment and current barriers to OL engagement already described, all mapped onto steps of the suggested interpretation of Kotter's model. This analysis provides further cues for determining a possible solution and also some further direction on changes required.

Critical Organizational Analysis

Thus far it has been argued that siloed work-OL application, excess functional control driving performance and exploitive learning emphasis, low intrinsic incentive for learning goal achievement or knowledge sharing, and no accountability to track or feed forward OL all contribute to poor frontline OL engagement. Further, that formal leaders cannot effectively drive increased OL engagement on their own and that improving specific behavioral and socio-relational engagement indicators will involve an employee-centric, team and authentic leadership approaches to change. Finally, this combined and distributive leadership approach also aims to support and balance, not replace existing OL processes but with a renewed pluralistic change vision that values cooperation and frontline autonomy needs as equally important (Keidel, 2005; Ryan & Deci, 2019) to OL engagement. The following section further examines factors contributing to low OL engagement at Organization X, and, aligned with Kotter's (1996) framework and emergent-complex principles of change, presents a critical organizational analysis outlining pragmatic social constructivist changes needing to occur in the process.

Establishing Urgency

Kotter (2007) mentions overcoming complacency is often the biggest change hurdle and is common whether an organization is struggling or excessively comfortable (Finnie & Norris, 1997). He recommends minimizing excessive, positive self-talk and the need to shake up

complacent thinking by actively highlighting organizational crises, observed failures, and missed potential opportunities (Kotter, 2007). Organization X's functionalist-positivist dominance, and comfort with historical successes have bred complacency with current OL practices that serve to maintain the conservative status quo (Feldman & Johnston, 2014; Guteck, 1997). This complacency emphasizes bureaucratic, structural control and exploitive learning for performance, over explorative OL for innovative growth purposes. In turn, exploitive OL leads to a culture of failure avoidance, motivates a limited number of employees to engage with it, and does so using less effective extrinsic rather than intrinsic reward motivators. Lastly, reduced incentive for explorative learning hinders development of agile employee skillsets needed for the future and discourages sharing-application of employee knowledge across organizational boundaries. Therefore, frontline OL engagement solutions proposed must pay more attention to balancing explorative and exploitive OL purposes so that the largest integrative benefit is realized by intrinsically motivating the greatest number of employees to behaviorally engage.

Establishing urgency of this change involves communicating these organizational failures and inconsistencies with current OL structural supports and processes as well as future risks that decreased OL engagement can have on Organization X. Measures to communicate urgency include this author presenting OL doctoral work at Organization X's monthly research forum and rooting this presentation in a personal narrative of OL engagement-effectiveness challenges experienced over the past 3 years. This presentation serves to authentically role model desired OL practices but also openly elicit observed gaps or disengagement symptoms found in OIP analysis. This open communication can also prompt discussion, debate, and added insights about what others think requires change, further validating or refuting if gaps identified also resonate with stakeholders in attendance. Establishing urgency through this open two-way communication

similarly plants personal mastery, mental models, shared vision, team learning and systems thinking seeds of OL (Senge, 2006) engagement change. Initiating these open discussions about OL gaps and establishing urgency can also help identify additional change supporters or as Kotter would claim, interdependently inform a related change step of recruiting “members of the guiding coalition” (p.52).

Establishing and maintaining urgency also requires references to overlapping CHI metrics in dire need of attention, questioning what initiatives and progress are actually moving these metrics forward, and pointing to any success of industry competitors. Frequently relaying inconsistencies and appealing to an improved state is an effective way to win the hearts, minds, and stakeholder support of wanting to change (Kotter, 1996). Communicating the superior results of competitors while highlighting how any of their fully engaged OL processes are potentially leaving Organization X behind can also establish and sustain change urgency.

Build a Guiding Coalition

Members of a coalition guiding change must have enough power and influence to curb resistance and help propel it (Kotter,1996); however, who, how many, or the types of power these coalition members must hold are scantily described. Intuitively, enough coalition members must hold legitimate power because formal leaders not only impact higher OL engagement (Ng & Ahmad, 2018), they can also help support or strongly resist change initiatives (Cawsey et al., 2016). Those with legitimate positions of power have unique coalition abilities arising from authority to potentially change the organization’s structure, delve out resources or rewards to support a change (Kotter, 1996), and also access privileged non-public information important to organizational learning and decision making (Nguyen & Hansen, 2017). Formal leaders in this guiding coalition are identified as senior executive champions of the complimentary CHI

initiative who as mentioned were already approached. These leaders showed keen interest in early OL engagement topic discussions, gave active support instituting organizational data collection, and seek regular updates on OIP progress. These coalition members already have an important stake in CHI metric success, so would likely continue to support OIP success. In addition, mid-lower level managers from a wide representation of units at Organization X can also be important coalition members, who should welcome help to drive OL engagement and lend change support by helping identify and recruit frontline employee coalition members.

Frontline employees sought for coalition membership will represent a broad swath of organizational units, hold high work knowledge expertise, and have a reputation for collaboration and knowledge sharing. Including coalition members who execute interdependent tasks in mobilizing projects is important, as they can better self-identify as a team (Salas et al., 2005). Thus members from different educational development, communications-marketing and internet technical support backgrounds etc. will be approached and initially also have the most to gain from the OL engagement change. Broad membership representation could also mobilize greater socio-relational OL engagement change by traversing existing bureaucratic organizational boundaries and promoting change in routine cultural practices. Ratios of informal to formal leaders within the guiding coalition will be weighted in favor of the former, due to peer influence having greater effects on OL engagement (Ng & Ahmad, 2018) as well as this author's informal position of influence and chosen distributed leadership approaches. Choosing an informally led coalition is also supported by views that successful change emerges from the fringes of organizations, rather than its hierarchal centre (Higgs & Rowland, 2005; Senge et al., 2015) and is vastly different from the usual formal leader membership core instituting changes at Organization X.

Develop-Communicate Clearly Shared Vision

The OL engagement change vision articulated in this OIP is not only built from this author's personal inquiry, philosophical-experiential perspectives, and observational analysis of organizational needs. As both Kotter (1996, 2014) and Senge (2006) recommend, this shared visionary state is similarly derived from the very mission, vision, strategic priorities, and values collectively developed and determined as important to Organization X's stakeholders. Clearly communicating the future change vision described earlier in this OIP as congruent and complimentary to these collective value priorities (e.g. service based global leadership, collaboration) can improve buy-in (Kotter, 1996). More than words, communicating the vision through authentic role-modelling actions expected in the future state at every OL opportunity effectively allows others to see how the vision is enacted and buy-in to changing what's necessary (Kotter, 1996; George, 2007). Although organizational mission and vision are regularly communicated at Organization X, explicitly connecting vision and espoused value statements as applied to common daily work- learning practices or in this case OL engagement is a definite change from the cultural norm.

Empowering People to Act

Structural barriers such as hierarchy, inter-departmental work organization, and regularly scheduled existing work processes are often points of resistance at this step (Kotter, 1996). High workload demands and time pressure on both managers and employees (Org X, 2019) also limits current capacity to facilitate, generate, absorb, retain, transfer, and use OL in a highly engaged manner. This limited capacity and numerous people sought for high engagement diminish probability for rapid, initial large scale change (Kotter & Schlesinger, 2008), requiring that proposed solutions be smaller and more feasibly digested given the current organizational

climate. Although Kotter (1996) mentions removing structural barriers empowers people to act, this author's position of influence and a fragile current capacity for large scale change at Organization X makes doing so unfeasible. Instead, a balanced OL engagement solution that does not severely disrupt or transform existing structure will be sought and instead will creatively use available free time (e.g. lunch and learns), existing resources, and structural supports that are available to empower people.

Successful OL change *can* occur when solutions are embedded within existing structure and made time efficient when reinforced or integrated into regular work activities (Hannay, Jaafar, & Earl, 2013). Change solutions will seek to leverage use of available technological or other tools to better connect employees, make OL processes more time efficient and resulting knowledge products easily accessed for use when needed (Barley et al., 2018). These structural considerations demand a pragmatic social constructivist OL engagement solution that involves rethinking current organizational routines such as team meetings as a way to create spaces for engaged OL or otherwise reconceptualising how available time is used. Specifically considering these current employee frustrations, capacity limitations, and structural barriers disempowering staff is a change from current leadership practices at Organization X, which is often internally criticized for attempting to accomplish too much without clearly established priorities. A solution focussed on learning time spent differently with a greater network of connected and coordinated people can empower stakeholders to change despite structural barriers that exist.

Control and power loss fears resulting from sharing knowledge unique to a role position or level of expertise (Lawrence et al., 2005) was identified as a potential barrier to this OL engagement change. Frontline employees and managers whose different units compete for finite resources may fear losing jobs and power if openly sharing information or tacit and explicit

knowledge they hold (Barley et al., 2018). Therefore OL engagement solutions proposed must minimize these power and control loss fears and can do so by attending to the degree of specialized knowledge that requires transfer (Barley et al., 2018). Maintaining proper knowledge differentiation-integration balance in proposed solutions also reduces time required to conduct collaborative OL processes and minimizes inter-role conflict or redundant task responsibility that is negotiated in collectively applying OL to work efforts (Barley et al., 2018). Attending to focused information exchange and fear of knowledge power loss is a change from current practices at Organization X where important learning information is perceived to be closely guarded by managers and inconsistently forwarded for use by employees.

Mistrust of formal leaders and potentially low trust in frontline employees to sense, collectively interpret, generate knowledge, and apply important OL to organizational challenges or goals is also identified as an empowerment barrier requiring change. Given low accountability to strategically track, feed forward, and evaluate organizational learning in current structural processes, documenting the OL taking place in new OIP solutions can build both cognitive and affective trust (Louis & Murphy, 2017) in frontline employees. The after action review method popularized in military circles is a potentially useful tool to capture and code OL with a simple focus on main elements of intended goals, what actually happened, and what should be done differently next time (Duffield & Whitty, 2015). To these ends, solutions proposed will involve well-documented, transparent, and committed OL process so that any successes can be openly communicated to formal leaders and resulting trust of frontline employees developed. Developing this trust can lead to further employee empowerment (Louis & Murphy, 2017) and therefore ability to successfully lead this change and others over time.

Creating Short Term Wins

Cawsey et al. (2016) suggest that less structured, employee-centric, loosely defined changes be advanced through a “do first” (p.302) approach where change starts through tiny incremental steps and is further strategized and modified using the knowledge of committed employees. Again, this requires proposed OL engagement solutions to start small but occur immediately and often, with belief in the potential for tiny efforts to perpetuate greater changes over time (Senge et al., 2015). Small OL engagement steps that require little structural disruption but still maintain cooperative-autonomous-control balance must be made explicit, as these are actual short-term wins. Authentically role modelling socio-relational OL engagement efforts are one way to generate several short-term wins. For example actively approaching new peers to offer onboarding assistance or asking a knowledgeable insider from a different unit for work-related information are simple practices demonstrating initially small but engaged OL possibilities. Providing both personal and public recognition of those who are willing to create and share OL information is limited at Organization X and changing these *laisse faire* practices can further promote other simple short-term wins moving forward.

Building on Change Gains

Short-term wins are used to further refine and clearly define larger strategic solutions that help realize collective change vision (Kotter, 1996; Senge et al., 2015) which are described in subsequent sections of this chapter. Building on small change gains will be accomplished in part by applying plan-do-study-act (PDSA) cycles (Taylor et al., 2014) when piloting an OL engagement solution and using observational data and questions arising to envision or refine larger possible solutions. Further, building larger change solution gains requires an expanded guiding coalition (Kotter, 1996) or in other words efforts of the wider organizational community

(Senge et al., 2013). In this expanded community, multiple stakeholders are empowered to collectively learn and envision their part in OL engagement change, as well as the systems integrated view (Senge, 2006) and collaboratively networked processes it requires (Senge et al., 2013). Having more people see themselves as part of the OL engagement change, and thus owning and participating rather than being passive recipients affected by it, is vital to building change gain momentum (Cawsey et al., 2016; Kotter, 2014; Senge et al., 2013). Lastly, although an action first strategic approach may be well aligned with this OL change, careful consideration to planning details that maintain end goal clarity and evaluative rigour through larger scale processes will be key (Cawsey et al., 2016). Leadership is essential at this change step (Kotter, 1996, 2014) so commitment to following through with larger solutions and regularly communicating the benefits of engaged OL practices may build further change gain momentum and support.

Institutionalizing Change

Kotter (2014) mentions that anchoring change in organizational culture or said differently, OL institutionalization (Crossan et al., 1999; Jenkin, 2013) comes as change gradually becomes part of daily operations. Poor political, communicative and OL implementation know-how of frontline knowledge holders to enable institutionalization was identified as a potential barrier. Also, functionalist control and departmental individualism limits inter-office collaboration and this lack of cooperative balance results in siloed intuitive, interpretive, and integrative OL transfer (Crossan et al., 1999; Jenkin, 2013) further risking non-institutionalization of the proposed change. These needs and risks then, demand a collaborative community integrated solution and distributed leadership approach in order for institutionalization to eventually materialize. Emphasizing common goal attainment,

communication effectiveness, relational diplomacy, mutual accountability and trust as previously highlighted through team and authentic leadership practices can help overcome institutionalization barriers to OL engagement change. Employee team learning and leadership behaviours observed and practiced in OL process solution settings can also potentially transfer back to the unit team level or be carried further forward if units work-learn together (Rebelo et al., 2019; Senge, 2006). Such small increment steps and eventual community spread towards change institutionalization sows initial seeds for cultural change and institutionalization to emerge.

Critical analysis summary

Overall this analysis of combined organizational context and current barriers to OL engagement change mapped onto steps and suggested interpretations of Kotter's model, favours smaller scale and frontline led solutions over large formally led structural changes (e.g. performance appraisal and professional development funding policy reform). Also, it was evident that Kotter's steps and stakeholders within them are not distinct in moving change on their own sequentially but rather are interrelated, complimentary to one another, and potentially repeated or revisited along the change trajectory. Therefore, this change vision views initial small scale steps and solutions enabled by an empowered community not as the end, but as the emergent springboard used to propel momentum for larger structural and cultural OL engagement changes to occur.

The next section of this OIP departs slightly from change frameworks discussed as useful to envisioning and mobilizing change but still considers specific contextual information, distributed leadership approaches, and pertinent data forwarded in POP and organizational critical analysis. This information in conjunction with pragmatic and social constructivist lenses

are used as the back drop from which several possible OL engagement solutions are now presented alongside rationale for rejecting or accepting them in the OIP.

Possible Solutions to Address the Problem of Practice

The majority of OL literature is theoretical, not practice based (Basten & Haaman, 2018); however, practical OL processes and products are identified as important to Organization X's specific operations, mandate, survival, and engagement focus of this OIP. Garvin (1993) first forwarded concrete OL process examples of systematic problem solving, learning from the past, learning from others, and transferring knowledge. Further, practical OL products can be categorized into those enabled by people, processes, or technology, which should strive to transfer both explicit and tacit knowledge (Basten & Haaman, 2018) across 4i levels (Crossan et al., 1999; Jenkin, 2013) to engage as many organizational stakeholders as possible. Eliciting different potential OL applications at Organization X is a first step in examining whether these offerings might improve, hinder, or maintain current levels of cognitive, behavioral, and socio-relational learning engagement with them. Several OL possibilities are discussed in the following section and examined for comparative engagement consequences, benefits, and resource needs needed to implement them. The section concludes with rationale supporting a specific OL engagement solution given current contextual and situational realities of this practitioner and at Organization X.

Solution: Maintain the Status Quo

As previously mentioned, current approaches to encourage OL engagement include a combination of structural and people-based functions that include performance appraisal policy-process, professional development funding support, and coaching-mentoring relationship expectations between supervisors and direct reports. As explained, these insufficiently engage

frontline employees in OL for reasons that include an individualized performance-focused, exploitive OL emphasis, which discounts intrinsic motivational need fulfillment at the expense of discouraging participative engagement among employees (Berg & Chung, 2008; Gerards, de Grip & Weustink, 2018; Kauppila, 2018; Ryan & Deci, 2019). Also, the current focus on formal leadership control places full responsibility for OL engagement on managers who are already challenged with high workloads and near burnout (Org. X, 2019). This is relevant given research suggesting that peer-to-peer learning relationships command higher behavioral and socio-relational learning engagement versus relations with supervisors (Ng & Ahmad, 2018). Also important is existing inter-departmental individualism and siloed work structure creating a barrier to collaboration and thus socio-relational OL engagement. It was argued that increased collaboration disseminates OL engagement broadly and this could potentially improve performance by reducing duplicate efforts and operational workload frustrations currently experienced by employees involved in educational development projects. Aside from these drawbacks, balanced discussion involving merits rather than just criticism of the status quo OL engagement solution should be forwarded.

First, the benefit of having professional development funding opportunities removes financial barriers to external knowledge access and does provide extrinsic incentive for learning. These funding resources can spur some engagement with 4i intuitive, interpretive OL processes (Crossan et al., 1999; Jenkin, 2013) at the individual employee level. Also, including a performance based exploitive purpose within cultural OL-work practices does attain learning some benefits of fully capitalizing on what is already known (March, 1991). These exploitive pursuits can similarly engage employees who are primarily performance goal oriented (Hirst, Van Knippenberg, & Zhou, 2009; Ryan & Deci, 2000). These OL engagement benefits should be

leveraged rather than discarded in a solution, however, data presented in this OIP suggest current practices are insufficient in obtaining full OL engagement among the organizational collective, with catastrophic risks if left to do so on their own.

It is easy to assume that no additional financial cost is required to maintain the status quo, however hidden or future costs of inattention to OL engagement are more difficult to estimate. At best these could include costs of decreased productivity or losing tacit knowledge resulting from increased attrition rates. At worst this cost would involve organizational irrelevance and extinction given the failure to improve learning agility in our current era of rapid knowledge expansion and change. In a knowledge-based economy there is a dire need for all organizations to actively improve the agile speed to which knowledge acquisition, sharing, interpretation, and applicable use for benefit happens (Kirkman et al., 2011).

Solution: Post Mortem Project Evaluation

OL accomplished through post mortem project evaluation (PMPE) occurs by sharing and reflecting on past experiences with documented project successes and failures put forth by participants (Basten & Haaman, 2018). Shared mental models about these experiences develop (Senge, 2006) and learning is enriched if clients and other external stakeholders also provide input (Basten & Haaman, 2018). Sharing project experience in dialogue also promotes social learning engagement and externalization of tacit knowledge that is difficult to describe and capture in written form (Basten & Haaman, 2018). Externalization is further enhanced when PMPE meeting conversations themselves are transcribed and coded into reports which can eventually be shared (Basten & Haaman, 2018). The purpose of post mortem project evaluations is to identify lessons learned and optimization opportunities that will advantage future executions of similar project work (Basten & Haaman, 2018). This practitioner's observations suggest that

PMPEs are an uncommon practice at Organization X and that the process might be instituted at the administrative leader level if currently done at all. This is problematic given the rich informational input and operations experience that frontline employees would add to PMPE. Further, if this OL process does take place, PMPE knowledge that is generated is not openly shared with operations employees who may benefit most from it.

Advantages of this solution are in its potential to invoke 4i OL framework components of collective knowledge intuiting, interpretation and integration (Crossan et al., 1999; Jenkin, 2013). Further, collaboratively bringing PMPE participants together formally facilitates social construction of knowledge and sharing through socio-relational and behavioral engagement within an OL process. Disadvantages include the primary exploitive learning focus of PMPEs which as described may not see full engagement from employees who are more exploration learning goal oriented (Ryan & Deci, 2019). Also, financial obligations for implementing this PMPE solution most effectively might not be feasible given the new employee role or skillsets potentially required (e.g. data analyst) or expense related costs of bringing in external stakeholders for PMPE consult. Although, this solution has some promising OL engagement benefits, it fails to include the important explorative learning component and if implemented in Organization X's current cultural state would most likely still fail to include and reach frontline employees or be disseminated widely.

Solution: Chief Knowledge Officer

A chief knowledge officer (CKO) is the, “designer, implementer, and overseer of an organization’s knowledge infrastructure” (Jones, Herschel, & Moesel, 2003, p.53) whose role is central to formally supporting OL from an administrative level (Basten & Haaman, 2018). Knowledge infrastructure design required in this role determines specific means to code,

categorize, store, communicate, and provide easily retrievable knowledge that can be used by employees (Basten & Haaman, 2018). The CKO also serves to manage, broker, and communicate information flows between teams, aimed at influencing both exploitive and explorative OL knowledge creation (Jones et al., 2003). The role can also leverage relationships with external knowledge sources (e.g. clients, other organizations) aiming to ensure that any knowledge gained from these partnerships is shared internally and transferred across organizational boundaries (Basten & Haaman, 2018). This role and solution could be integrated into existing structural operations and currently falls under listed responsibilities of the enterprise and information management teams (Org. X, 2017). Although strategy and responsibility of these teams are clearly outlined (Org. X, 2017) and aligned with the CKO role, it is unclear to this author if a CKO role actually exists within those teams and if so who is actually designated those responsibilities. Regardless, current observations are that the technical support and information management teams' primary focus is on providing technical solutions and training around them rather than applicable OL information collection, analysis, and dissemination to frontline employees.

Advantages to implementing the CKO role solution include having a formally designated leader responsible and accountable for OL at the administrative level. Establishing this person's role would symbolically and structurally represent OL as an important priority at Organization X. These missing aspects are important and emphasize how and why formal leadership and structural design help facilitate OL success (Garvin et al., 2008). Disadvantages to this solution include a significant salary cost of needing to create and hire someone into the CKO position in addition to expenses incurred to better establish the technical knowledge exchange infrastructure required for the CKO role to succeed. Importantly, placing onus on only one person to accurately

determine the information that is considered important to learn and exchange for every individual, team, and situation is also unrealistic. Similar to existing practices, unilateral control over intuiting, interpreting, integration and institutionalization 4i processes is unlikely to be effective. Also, leaving an administrator that is distanced from practice and operational realities to solely determine what knowledge is important to obtain and transfer across the organization risks poor utility of this knowledge and the ability for others to apply it. Lastly, using only formal leadership to drive OL engagement does not lend to building collective accountability and responsibility for frontline OL engagement.

Solution: Community of Practice

Social learning theorist Etienne Wenger first coined the term community of practice (COP) almost 2 decades ago and defines them as “groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly” (Wenger, 2011, p.1). These groups are guided by commitment to a common domain of intrinsic interest that helps them identify as a community and to which they desire increased competence with (Wenger & Wenger-Trayner, 2015). COPs include core elements of leadership, membership, events, connectivity, projects, and artifacts required to make them successful (Wenger, 2001, 2011). Communities of practice then, appear to embody an actively engaged, informally led, practical approach to organizational learning, where members of varying experience levels are motivated to come together for the main purposes of creating and transferring knowledge together (Basten & Haaman, 2018; Kirkman et al., 2011; Loyarte & Rivera, 2007; Wenger, 2001).

Knowledge transfer is accomplished through socialized relational exchange meetings where members holding different roles and skillsets use the COP learning environment to share

past experiences about problems and newly discovered or existing approaches to solving them; in essence, collectively learning with and from each other (Basten & Haaman, 2018; Kirkman et al., 2011; Wenger & Wenger-Trayner, 2015). These problem-focused knowledge exchange forums could be as effective as PMPEs for eliciting tacit experiential knowledge and improving performance through exploitive learning discussions. However, as information is openly and experimentally shared among members, new ideas, knowledge artifacts, and innovative problem solving approaches also emerge (Basten & Haaman, 2018; Wenger, 2001). Community knowledge sharing, innovation, and new artifact creation happens rapidly in COPs (Kirkman et al., 2011) which can lead to operational efficiencies, cost reductions, and improved work quality (Basten & Haaman, 2018). These learning speed and broad dissemination advantages would attend to inter-departmental siloed learning realities and education product development quality-efficiency concerns already mentioned in the analysis.

An educational design-development COP at Organization X would require bringing together employees with interdependent work roles and skillsets from various departments which include communications-marketing members, internet technical support employees, curriculum-instructional designers, and project coordinators. In this COP multiple stakeholders would be collectively empowered-motivated to learn from peers and better able to envision their part in OL as well as the networked collaborative system it requires (Senge, 2006; Senge et al., 2013). Having many frontline employees see themselves as part of the OL engagement solution, and thus owning and participating rather than being passive recipients is vital to change success (Cawsey et al., 2016; Kotter, 2014; Senge et al., 2013).

COPs are further supported by use of technology (e.g. wikis, web meetings) that can assist in collective knowledge development, sharing, and timely access to valuable information

when required (Basten & Haaman, 2018; Wenger, 2001; Wenger & Wenger-Trayner, 2015). As there is little accountability to strategically track, feed forward, and evaluate organizational learning within existing performance appraisal processes, technological resources to document OL taking place in the COP are important, and their accessed use would also indicate behavioral measures of learning engagement. Institutionalization and integration (Crossan et al., 1999; Jenkin, 2013) of this coded learning can be promoted by using existing resources of an open access network drive as it is important that OL be widely distributed and easily accessible so those who need this knowledge in real time can actually get and use it when required (Duffield & Whitty, 2015). The after action review method popularized in military circles is a potentially useful tool to help capture and code COP OL processes with a simple focus on main elements of intended goals, what actually happened, and what should be done differently next time (Duffield & Whitty, 2015). The COP solution embodies many OL theory, team leadership, pragmatic and social constructivist components in engaged action. These include collective intuiting, interpreting, integrating (Crossan et al., 1999; Jenkin, 2013), team situational awareness-communication, back-up behavior (Koeslag-Kreunen et al., 2018), sense making, team learning, shared mental models (Senge, 2006) and direct knowledge application (Wenger & Wenger-Trayner, 2015) with potential for institutionalizing emergent knowledge changes (Kotter, 2014) as well.

Different collaborative learning communities in addition to COPs were also examined as potential solutions and there are more commonalities than differences among them (Wenger & Wenger-Trayner, 2015). For example professional learning communities (PLCs) and networked learning communities (NLCs) both share similar high level goals of collaborative learning exchange and transferring knowledge-best practices across silos via distributed leadership

processes (Jackson & Temperley, 2007; Sai & Siraj, 2015). However, PLCs and NLCs also appeared specific to teachers versus diversely skilled professionals and more applicable to school contexts versus other organizational environments. Further, their primary concern is with improving student outcomes and mention other possible value adds such as explorative learning, innovation, and professional development only as secondary benefits (Jackson & Temperley, 2007; Sai & Siraj, 2015) which are particularly important to this OIP. In essence when comparing different learning communities the COP solution appears to be a better fit given its wider applicability, change vision of this OIP and whose core design elements necessary for engaged learning success are more defined (Wenger, 2001; Wenger & Wenger-Trayner, 2015). Financial considerations in implementing a COP solution also potentially appear more favorable than previous solutions presented. As COP are often resource limited, leadership distributed, often informal, and membership voluntary (Wenger & Wenger-Trayner, 2015) no new staff positions would be required to implement the COP solution. Although deeper inquiry would be needed, use of existing technological and physical-virtual meeting space resources at Organization X could seemingly also be leveraged for COP use and not incur any additional financial cost.

Solution: Integrating COP and Status Quo Merits

Although separated into advantages-disadvantages of each solution, the complexity of improving OL engagement given this author's non-formal influence, current contextual realities and doing so within a feasible scale, timeframe, and limited available resources demands combining two proposed solutions. Combining the existing status quo and new COP solutions attains more comprehensive theoretical coverage, while also ensuring that the merits of existing OL engagement processes at Organization X are leveraged rather than replaced. Existing status

quo merits include continuing professional development funding availability as incentive for exploitive learning pursuits, already expected OL engagement effort with managerial coaching conversations and also documenting learning goals tied to work within the performance appraisal process. Further, a combined strategic approach helps ensure the small increment, informally-led COP solution proposed is integrated and provides synergistic benefit to existing structure. Basten and Haaman (2018) mention that strategically combining several process approaches is supported by research findings that no 'one size fits all' OL approach exists, and that a multi-prong strategy considering local context leads to increased overall effectiveness.

Adding the grassroots OL COP solution also helps maintain needed balance of autonomy-control-cooperation (Keidel, 2005) with attention to intrinsic needs fulfillment priorities (Ryan & Deci, 2019) for OL engagement strategy at Organization X. Employees learning together in a COP can facilitate or share forward any existing intra-departmental team learning activities currently hidden in siloed structure or potentially even strengthen those dyadic leader-employee learning mentorships already in place. Also, as many existing OL approaches emphasize exploitation and performance improvements (Basten & Haaman, 2018) COPs also encourage use of experimental-explorative methods (Wenger, 2011) currently needed to appease the engagement motivations of learning goal oriented employees.

Additional rationale for choosing a combined solution includes better alignment with chosen follower-centric OIP leadership strategies and feasibility to execute change given my current non-formal position of leadership influence. Claims that bottom-up, small increment type change initiatives are generally more successful, feasible, well-received (Cawsey et al., 2016) and that structural changes are slow and insufficient to modifying OL culture on their own

(Crossan et al., 1999; Garvin et al., 2008; Senge et al., 2013) further inform this combined choice.

Early PDSA and the Integrated OL Engagement Solution

Taylor et al. (2014) maintain that applying PDSA cycles holds advantages of initiating change on a small scale first, adapting the solution in line with local context, and attending to continuous quality improvements that are deemed necessary. Also, PDSA can identify when a solution is not working as intended or having negative outcomes, and this is important to quickly recognize any adaptations required or if the solution should be abandoned early. Although an action based, small increment emergent approach is well aligned with this OL engagement change, carefully considering planning details that maintain end goal clarity, momentum, and evaluative rigor through all stages will be key (Cawsey et al., 2016). Table 2 below explains how a first PDSA cycle will be applied to the integrated COP solution with pilot testing rigor on this author's local work team.

Table 2.

PDSA and COP pilot test

PDSA Component	Component action items
Plan	<p data-bbox="618 417 1360 562">Determine-validate learning need with team, pick OL engagement target (cognitive, behavioral, socio-relational) problem topic, and discussion question objectives for the meeting.</p> <p data-bbox="618 600 1398 669">Socialize new COP idea with and receive approval to include exercise in team meeting from manager</p> <p data-bbox="618 709 1422 816">Anticipate intervention needs, ask for help (e.g. Can you summarize key learning points while I facilitate discussion and record observations?)</p> <p data-bbox="618 856 1419 1001">Determine questions to be answered as intervention unfolds (e.g. is after action review method effective at capturing both exploitive-explorative OL engagement in a small group? What are the success indicators? Is another tool required?).</p> <p data-bbox="618 1041 1386 1186">Predict what will happen, anticipate risks, have contingent back-up plan (e.g. audio record versus transcribe discussion, highly controversial question in cue to prompt stalled participation).</p>
Do	<p data-bbox="618 1220 1338 1289">Execute the OL engagement change intervention, keenly observe and document problems.</p> <p data-bbox="618 1329 1430 1436">In addition, identify and document intervention positives-things that went well to enrich data collection and holistically inform the iterative improvement cycle.</p>
Study	<p data-bbox="618 1472 1422 1579">Examine all collected data, cross validate accuracy with participants and compare to original predictions. Apply lessons learned to original questions. Analyse for common themes.</p>
Act	<p data-bbox="618 1619 1403 1764">Identify necessary modifications and successes so next round team pilot testing is improved. Determine additional planning requirements-deletions needed to scale intervention to the larger more diverse COP audience.</p>

In closing, it should be mentioned that all the possible OIP solutions forwarded here were targeted over larger scale structural change possibilities such as performance appraisal and continuing professional development funding policy reform at Organization X. Yet, to fully realize benefits derived from this OIP change vision and combined status quo-COP solution, longer term structural changes will also be necessary to ensure any OL engagement improvements are deeply institutionalized (Crossan et al., 1999; Jenkin, 2013; Kotter, 2014) and sustained.

The section that follows examines the OL engagement change from an ethical perspective and how a renewed focus on balanced character virtues versus the current leadership approach to ethics at the organization can promote collective accountability and holistic benefit to all stakeholders.

Leadership Ethics and Organizational Change

Empirical connections between unethical leadership and negative impacts these actions have on followers' lives is well established (Schyns & Schilling, 2013). Langois (2011) asserts that if leadership depends on ethics, "we cannot be content with good intentions and a desire to do something without actually taking any action" (p. 84). For example, simply documenting Organization X values or having a professional development funding policy to improve access does not guarantee ethical actions reflecting these values, or that OL funding decisions consider ethical interests of both the organization and employees equally. These ideas suggest that ethics is not only informed by external principles to be weighed and considered, but that moral benchmarks are also inextricably linked, embedded in, and pragmatically exercised through a leader's conduct with others (Crossan, Mazutis, Seijts, & Gandz, 2013; Donlevy & Walker, 2011; Liu, 2017). Said differently, understanding ethical principles is important, but internalizing

values and applying them is what really counts (Liu, 2017) and this interdependent relationship can be examined through a virtues-based ethical lens (Crossan, Seijts, & Gandz, 2015; Crossan et al., 2013).

Eleven character virtues (i.e. Humility, Integrity, Drive, Collaboration, Justice, Courage, Temperance, Accountability, Humanity, Transcendence, and Judgment) commonly resonate as positive moral attributes across cultures and contexts (Crossan et al., 2015). Virtue ethics originate from, and reflect, innate beliefs, personality traits, and values formed and habituated early in life (Crossan et al., 2013; Donlevy & Walker, 2011). Yet, leadership character is not fixed, it is also dynamically developed, and virtues making up ones character can be variably expressed in degrees of excess to deficiency (Crossan et al., 2015; Crossan et al., 2013). Practical wisdom and judgement help balance excess or deficient virtue expressions and this judgement is built through previous experience and learning to weigh context, risks, benefits and outcomes with others (Crossan et al., 2013). These virtues and collectively observing their scaled behavioral expressions can inform sound ethical decision making (Crossan et al., 2015; Crossan et al., 2013) as well as team-authentic leadership practices, and a supportive environment that helps facilitate frontline OL engagement.

Excess or deficient virtue expressions will inevitably be exposed at various change step phases or in COP solution meetings and these will be important to observe, highlight and appropriately moderate when seeking full OL engagement in participants. Ehrich, Klenowski, and Spina (2015) found that although study participants easily remembered ethical practice examples, none of these examples included supervisors actually talking about ethics with followers. This gap suggests it would be valuable to explicitly discuss virtues or outwardly state team learning ground rules prior to COP meetings rather than just assume that ethical knowledge

and moral practice will automatically exist. Discussing virtue examples could include humility when establishing change urgency (Kotter, 1996) as humility precipitates willingness to change complacent thinking, acknowledge weaknesses, and pursue OL as a means to grow from or avoid future errors (Crossan et al., 2015). Similarly, demonstrating the virtue of courage is required to admit previous failures, or allow for team trust (Salas et al., 2005) and is needed to openly communicate information so comprehensive interpretation, sense making, and problem based learning can happen. Collaboration, humanity, and transcendence virtues are equally important to guide team OL ethics as these virtues call for collectively transcending the pursuit of individual interests to achieve higher order common goals or a purpose larger than oneself (Ryan & Deci, 2019; Senge, 2006). Grounding OL ethics in collective virtues and internal duty to all stakeholders because they are all part of the human organizational community resonates within this OIP.

Along these multidimensional lines, ethical leadership is also an emergent and relational phenomenon (Liu, 2017) arising out of human interaction which is “not a fixed backdrop awaiting discovery, but instead, is a fluid and dynamic construct that social actors continuously produce and reproduce...what constitutes ‘ethical’ and indeed, ‘leadership’, are negotiated in its particular situation between social actors” (p. 348). Along these lines, negotiating an ethical relational OL environment in the best interests of all requires the same elements for high reliability team working-learning to flourish (e.g. trust, psychological safety) as well as team and authentic leadership practices (e.g. member checking, open communication, back-up behavior) necessary to build these elements. Similarly, role modelling this type of behavior in team practice establishes ethical relational norms that can help individuals reflect on and learn to refine their own character virtues. Virtue based ethics, enacted and negotiated in authentic team

learning relationships, blends established virtues with a humanistic duty to balance and apply them to collective problem solving goals and welfare of all others on a team.

Ehrich, Klenowski, & Spina (2015) also assert ethics is relational, important for learning institutions and involves (a) care (i.e. mutually respecting humanistic worth and responsibility to look out for one another); (b) justice (i.e. fair and equitable treatment); and (c) critique (e.g. attending to power issues that advantage some while disadvantaging others). Leaders are accountable to several co-existing moral obligations and face ethical dilemmas when these obligations conflict in certain situations (Ehrich et al., 2015). For example, healthy critique given differences of opinion is at the heart of open dialogue essential to OL (Senge, 2006) yet resolving these differences in a shared mental model is important to socially constructing knowledge in team learning (Rebelo et al., 2019; Salas et al., 2005) and therefore may surface a dilemma when the ethics of care and critique need to co-exist.

Different purposes-interests of explorative versus exploitive organizational learning previously described also risk potential conflicts arising out of a simultaneous ethical obligation of leaders to care and maintain justice. Exploitive learning over-emphasis with a primary focus on performance at Organization X suggests this practice underweights an ethics of care to promote OL growth and development opportunities for employees. Also, the fact that only formal leaders dictate and guide OL engagement is unjust and requires a critical eye towards why this disproportionate frontline leadership representation exists when everyone is affected by organizational learning and accountable to the broader community. This underrepresentation of frontline employees driving OL engagement again uncaringly and unjustly limits their growth potential for learning to lead such initiatives while also unfairly placing full responsibility and workload of engaged OL on the shoulders of managers.

The grassroots COP OL engagement solution respects both an ethics of care that increases explorative learning growth opportunities for frontline employees to reach full potential while attending to reciprocal justice concerns of organizational performance improvement and equitably distributing OL facilitation workload. This ethical obligation balance can be further achieved by maintaining COP goals to feed forward both exploitive learning that improves performance as well as explorative learning to identify performance gaps and organizational or employee growth needs. Seeking out both exploitive and explorative OL results in the COP, similarly appeases and engages both learning goal oriented and performance goal oriented employee types. The former are intrinsically motivated to engage in COP learning processes for purposes of achieving task mastery or developing to fulfill some desired life purpose, with the latter motivated to engage in OL for continuous quality improvement and extrinsic recognition needs (Ryan & Deci, 2000, 2019). These ethically balanced COP purposes coupled with follower-centric team and authentic leadership that drives engagement with them empowers all employees to ethically support the existing organizational vision and mission.

In summary, the previous chapter detailed benefits to using an authentic and team leadership approach to mobilizing emergent-complex OL engagement change alongside Kotter's framework steps that were also presented. Further, a combined COP-status quo solution and solid rationale for choosing this OL engagement approach was forwarded. The chapter concluded with an ethical discussion of the OL engagement change and how a renewed focus on balanced character virtues and collective accountability can support and provide holistic benefit to all organizational stakeholders.

Chapter 3: Implementation, Evaluation and Communication

This chapter of the OIP targets implementation, monitoring, evaluating and communicating the proposed COP solution to improve OL engagement, framed here as an emergent incremental change where an action first strategy integrated into existing structure is appropriate (Cawsey et al., 2016). It is suggested that COPs are informally structured (Wenger, 2001; Wenger & Wenger-Trayner, 2015) and that action first experimentation can help iteratively guide larger change plans or implementation improvements (Cawsey et al., 2016; Senge et al., 2015). Although a do first and structure as needed approach *may* work, eliciting initial COP solution goals, required change priorities, potential enablers, and logistic considerations informed by evidence in advance is logically more effective than mere trial and error. Also, it was mentioned that OL engagement is currently hindered by excess managerial control, bureaucratic siloed structuring, exploitive learning overemphasis, little incentive for learning achievement or knowledge sharing, and low accountability to track or feed forward knowledge at Organization X. These specific hindrances are targeted and used to inform decisions for the overall goals, objectives and design details of the following COP solution implementation and evaluation plan.

Change Implementation Plan

The next section presents a COP solution with its goal priorities, required resources, discussion of supporting stakeholders and potential implementation issues, packaged in a plan to mitigate existing OL engagement issues identified above. COPs should be designed for flexible evolving growth and varying participation levels (Carvalho-Filho et al., 2019; Wenger, 2001) while attending to their core elements of leadership, membership, events, connectivity, projects, and artifacts which make them successful (Wenger, 2001, 2011). These core components are

detailed in the following sub-section with deeper discussion about how planning and implementing them within the COP helps target and overcome OL engagement barriers identified in analysis and accomplish the overall leadership vision for change. The section concludes with a discussion of plan limitations, equally important to iterate and monitor for potential OIP impacts.

Priorities and Goals

Practice communities are guided by a domain and purpose that helps members to determine their identity, balance exploitive-explorative learning necessities, and maintain energy needed for community rhythm (Carvalho-Filho et al., 2019; Wenger, 2001; Wenger & Wenger-Trayner, 2015). The domain and purpose of the COP solution also frames the scope, outputs, and value possibilities created by the community with which members identify (Lave & Wenger, 1991) through genuine intellectual interest, pursuit of practice expertise, and desire to pursue continual inquiry (Wenger & Snyder, 2000; Wenger & Wenger-Trayner, 2015). Determining this domain and purposed guidance then can attend to these explorative growth, reduced control, and collaborative learning needs previously identified and is thus a top planning-implementation priority. Further, eliciting this domain-purpose as a priority also focusses on attending to the high level goal of improving engagement which involves immersive energy, interest, and active participation for OL to succeed.

The domain posited in this COP solution is medical education design, development, dissemination best practices and innovation. Its forwarded purpose tied to the OIP change vision is to *live the organization's mission, values, and strategic life-long learning priority as evidenced through the collective creation, sharing, use, and appraisal of medical education development best practices and innovation*. This COP domain and purpose supports both the

global leadership of medical education excellence mission stated in strategic directions and also intrinsic OL motivators of employees, and is thus likely to resonate as important to stakeholders at Organization X.

The planning, development, and delivery of education materials domain also cuts across many departmental roles, task related individual responsibilities, and common work coordination challenges faced at Organization X. This integrated domain of the COP makes it likely that members will self-identify with the community (Kirkman, Mathieu, Cordery, Rosen & Kukenberger, 2011). Integration is also important to the limited socio-relational learning opportunities impacting the problem, and allows fuller OL engagement across organizational boundaries to be made possible.

The domain and purpose also provides core guidance determining value outputs of the COP solution. These value outputs include providing increased intrinsic motivations needed to engage more frontline employees in OL (e.g. promoting autonomy, belonging, and explorative learning growth) while also attending to the current performance improvement and exploitive learning focus of the organization. Given COP ability to promote collaborative knowledge creation-utilization balanced with autonomous exploitive-explorative learning pursuits (Wenger & Wenger-Trayner, 2015) that benefit the organization, communicating the domain and purpose as connected to these complimentary outcomes is also an important initial and ongoing priority. These positive outcomes tied to the COPs domain and purpose will be important to communicate during early change stages (e.g. establishing urgency, building the guiding coalition, communicating clearly shared vision) so stakeholders buy-in, but also during solution implementation when short term wins are established, momentum builds, and the change is eventually institutionalized (Kotter, 1996).

COP Leadership

Leadership for solution implementation includes that which is internal to the COP as well as formal outside sources that will influence both the success and sustainability of the community through empowering support (Kirkman et al., 2011; Wenger & Wenger-Trayner, 2015). There is discordance when suggesting that COPs thrive because of informal autonomy as evidenced through membership self-selection, flexible activity choice, and structure (Wenger, 2000) while also requiring some management-coordination aspects that allow COPs to reach maximum potential (Wenger & Wenger-Trayner, 2015). This apparent paradox demands that COP internal leadership effectively balances autonomy, control, and collaboration (Keidel, 2005) which is a less directive approach than Organization X is accustomed, and also mentioned as important to the OL engagement problem. Rather than the COP solution being mandated or autocratically led by formal leaders, this asset demands a more distributed leadership focus of “bringing the right people together, providing structure for COPs to survive, and measuring the value COPs bring in novel ways” (Wenger & Snyder, 2000, pg. 140).

In line with team leadership practices detailed in Chapter 2 and as Wenger & Snyder (2000) suggest, internal leadership of the COP will be assumed by a primary facilitator (this author) but also distributed among other core participants. Internal COP leadership priorities will attend to communicating the solution’s purpose which is to achieve the common and simultaneous goals of moving forward strategic priorities of the organization and employee learning growth. In addition, COP internal team leadership during implementation stages will require recruiting members, communicating event logistics, and providing some basic coordinating structure to facilitate learning events-activities (Wenger & Wenger-Trayner, 2015). Team and authentic leadership practices such as transparent communication, mutual trust, back-

up behavior, and member checking (Day, Gronn, & Salas, 2004; George, 2007; O'Neill & Salas, 2018) will also be practiced during early implementation stages to maintain overall COP goal focus, maximize team learning, and ensure that differing opinions or threats to COP mutual goal achievement are voiced, heard and attended to. Internal leadership will also involve evaluating and communicating solution outputs and emerging value to stakeholders in order to build momentum from any initial gains and institutionalize change (Kotter, 1996) as the COP moves forward. Again this team and authentic more distributed leadership approach is valuable to help ensure any measured and communicated value outputs of the COP are removed from individual bias or some self-serving interest possible if done by only an individual leader.

External leadership support will also be sought throughout the solutions' short, medium and long term change trajectory to help continually nurture, support, and empower the community (Kirkman et al., 2011; Wenger & Snyder, 2000; Wenger & Wenger-Trayner, 2015). Senior organizational leaders can help COPs by removing barriers such as access to information, allocating resources like coordination help, or by modifying reward-recognition-promotion systems all demonstrating that collaborative knowledge generation, sharing, and its application are valued (Kirkman et al., 2011) at Organization X. Minimizing formal control and instead allowing autonomous actions that meaningfully impact organizational outcomes empowers practice communities, thus providing a key intrinsic motivator (Ryan & Deci, 2019) for participative engagement in COPs (Kirkman et al., 2011; Wenger, 2011). Formal leader support of the COP along these lines is included in solution implementation; however, as Kotter (1996) suggests, formal leadership is not specific to any particular change stage but instead applies and will be sought out repeatedly and to varying degrees along all steps from establishing urgency through to institutionalization.

Membership

Core COP members must have a passion for and advanced knowledge about the domain in addition to social facilitation skills that, when combined, provide energetic rhythm a community requires for success (Wenger, 2001; Wenger & Snyder, 2000). It is suggested that COP members select themselves and their agenda (Wenger & Snyder, 2000) so open invitation is important. Inviting members with a clearly communicated COP domain and purpose is needed so robust representation with a balance of required skillsets and viewpoints is acquired. Although members are self-selected, empiric evidence suggests that strategic recruitment of potential members whose roles and practice tasks are interdependently linked leads to greater COP effectiveness (Kirkman, 2011). Determining common problems across organizational boundaries is a way to identify these interdependently linked COP participants (Wenger & Snyder, 2000); as such, employees in departments responsible for education development and dissemination (e.g. IT, communications, and assessment) will be targeted for COP invitation. Determining potential core and peripheral COP members that include both internal and external stakeholders (Wenger, 2001) with attention to their potential interdependencies within the COP domain (Kirkman, 2011) is another implementation priority.

Events

COP event planning and implementation considers the medium(s) for, frequency of, and types of activities that facilitate community interactions and learning (Wenger, 2000). Ideally, this high engagement COP at Organization X will incorporate multiple event options such as face-to-face meetings and technology enabled interactive possibilities. Having both synchronous and asynchronous communication options is important to help mediate limited time, excess workload, and scheduling concerns mentioned as potential barriers to fully engaged OL

participation. Initially, in person meetings will be proposed on a monthly schedule with an asynchronous technology option (i.e. creation of WebEx chat room group) also set-up for continuous and just in time communication requirements.

Given the COP's domain and purpose, planned activities such as exploitive problem solving sessions or the explorative presentation and discussion of new knowledge applicable to medical education will rotate on an equally divided basis. Having an improved balance of these dual OL purposes was mentioned as important to improving the engagement problem. This balance demonstrates mutual ethical commitment to meeting both the explorative learning growth needs of employees in addition to the current exploitive learning and performance improvement focus of the organization.

Connectivity

COP connectivity involves more than merely organizing event opportunities that bring members together; it also refers to building interwoven relational networks and expanding connected communication possibilities (Wenger, 2000; Wenger & Wenger-Trayner, 2015). Professional development activities taking place in a COP motivate frontline employees by providing intellectual stimulation and reduced feelings of isolation in difficult problem solving (Dudar et al., 2017). This connectivity in the COP solution will be amplified by use of tools to stimulate rich group learning discussions such as the learning conversation protocol (Katz & Dack, 2016). Further, connectedness will also be facilitated by team learning leadership practices such as using open communication, trust building, and back-up behaviors that spur divergent ideas, expand situational awareness, and attend to conflict resulting from differing opinions when working towards common goals (Salas et al., 2005; Senge, 2006). COP connectivity will also be enhanced through technological communication tools and inviting both intra and extra-

organizational participants which enrich interconnectedness (Carvalho-Filho et al., 2019; Rana, Ardichvili, & Polesello, 2016). Lastly, connectivity can be promoted by trying to flexibly ensure space for both public and private member exchanges (Carvalho-Filho et al., 2019) and this will be partly achieved by creating a COP email contact information distribution list so members can connect outside of scheduled events.

Projects

COP commitment deepens when members autonomously determine (Wenger, 2011) and become collectively involved in project work, rooted in uncovering practice based needs and closing knowledge gaps important to them (Wenger, 2000). Carvalho-Filho et al. (2019) suggest starting with a focused problem or project and a priority example at Organization X will be to explore and exploit opportunities related to meeting newly legislated learning accessibility requirements for online learning. In addition to practice challenges observed by this author, surfacing common problems in initial COP meetings to determine those worthy of a community project will be accomplished by a round table member introduction and call to openly vent the biggest practice based frustration members commonly face. This problem venting will be searched by the group for a capstone project democratically chosen for volunteered completion. Similar to focusing on the COP connectivity component, project work targeted in this manner provides a solution to siloed OL currently taking place at the organization. These COP project efforts also have potential to reduce excess individual workloads through collective problem solving and direct learning application.

Artifacts

COPs produce and share artifacts which manifest in items such as documents, presentations, websites, or tools that are determined useful for improving practice expertise

(Wenger, 2000). A starting point for creating these artifacts in initial meetings include maintaining COP meeting agendas and minutes in addition to learning presentations delivered by and discussed among community members. Attending to these COP artifacts serves to code and store OL into memory (Barley et al., 2018) that can be valuable to guide subsequent meetings during early implementation stages or even to inform potential COP subgroups organizing as the high engagement change evolves and is institutionalized in the future. Created artifacts or coding and capturing OL within COP meetings will be facilitated by use of the after action review tool (Duffield & Whitty, 2015). Use of this tool and attending to COP artifacts demonstrates an accountable commitment to tracking OL with intents to feed this knowledge forward which was mentioned as deficient and problematic in the organization's current state.

Capturing COP learning artifacts and storing them for easy retrieval not only benefits community membership use after the fact, this data will also serve as a useful input for evaluation reporting. Maintenance and use of these artifacts empowers COP members during early change adoption while communicating positive results about them also supports transitional stages of building change gain momentum and institutionalization (Kotter, 1996).

Solution Resource Allocation

Change facilitators like this OIP author without legitimate power to formally distribute or reallocate organizational resources must be keenly aware of those already available and equally adept at determining how they can assist with change (Cawsey et al., 2016). Zero net financial resources are required to implement the initial COP engagement solution; however, additional expenditures include time, physical space, technological infrastructure, and importantly human resource energy drawn from community members. Without human resources a social learning community cannot exist, in addition to severely limiting the knowledge creation and sharing that

is possible. It is important to monitor this human resource capacity and when depleted, provide support to members by modifying COP implementation plans such as temporarily removing the burdens of robust process documentation. When capacities inevitably deplete at certain times during implementation, the COP can instead rely on the human brain for OL memory and artifact storage so members can still participate in learning conversations to guide the way.

Technological resource tools are required to help coordinate-facilitate meetings as well as manage COP processes and solution outputs (Wenger & Wenger-Trayner, 2015). These will include but are not limited to the existing network email server, shared network drive used to store artifacts, project management and virtual collaborative meeting software (i.e. Microsoft project manager, WebEx) to facilitate meetings at a distance or fill just in time COP communication needs.

This author is also committed to seeking additional resource support from senior leaders who can assist with incremental change expansion and wider dissemination of engaged OL. Year one of the planned solution seeks minimal support of external leadership and instead focuses on executing and refining community priorities of connectivity, events, processes, a capstone project, and learning artifacts that all help build formal leadership trust of the community. An initial support request written up in proposal to executive council will ask for simple COP endorsement, a list of suggested external medical education experts to be used for communications-recruitment, and a symbolic financial support gesture of \$1500. These funds retrieved from the primary COP facilitator's yearly professional development allowance are to be approved for use as the solution's initial operating budget. Evaluating value outcomes arising from initial COP activities will provide evidence and rationale for increasing financial and

administrative support momentum needed for longer term OL engagement success and institutionalization over time.

Stakeholder Reactions and Adjustment

Anticipating stakeholder reactions and iterative modifications required in COP implementation can be scenario simulated using potential perspectives of two groups: formal management non-members and COP frontline members. First, it is possible that once the broad communications plan and proposal to executive council for support are forwarded that the proposal is rejected or otherwise resisted by management given data suggesting high workload (Org. X, 2019) and a perceived incapacity of staff to participate. Although formal leadership approval can help foster COP success, an official blessing is not required to initiate the change plan as stated. This resistance scenario though, requires extra attention be paid to communicating impacts of the OL engagement problem, collective benefits of implementing the solution, and minimal resource requirements or disruption to status quo operations that it takes. Ensuring that COP events are hosted outside regular work hours and further communicating that COP activities can potentially reduce current workload frustrations and improve performance are also important to reducing this potential reactive resistance.

Observing and obtaining feedback from pilot tests and COP participants with regards to the proposed domain, processes, future topic selection, and implementation tools used is key to identifying member reactions and implementation adjustments. Feedback surveys created in Survey Gizmo will be used to easily collect this data and more importantly generate reports that capture community insights as the COP change advances. Commitment to validating and revising any original purposes, goals, or activities of the COP that produce negative membership

reactions in shared visioning (Kotter, 1996) can improve personal commitment of the group (Wenger, 2001) and further support them to see the engagement change through.

Building Momentum

Given that a COP is new to Organization X, success benchmarks important to empower stakeholders and build change gain momentum (Kotter, 1996; Wenger et al. 2011) include simply starting one, learning what works well or doesn't, and sustaining the COP for a full calendar year cycle based on solution adjustments. Other key milestones include documenting structural COP process successes over the initial implementation period in addition to recording and sharing learning artifacts among a consistent membership of at least 10-15 core and peripheral COP members. Long term success indicators further supporting institutionalization (Kotter, 1996) are detailed further in the monitoring and evaluation sections of this OIP, however introductory indicators already mentioned here hold potential to empower any change stakeholder (Kotter, 1996) wanting to participate or assume a shared COP facilitator role. Lastly, as these targets are reached, change momentum built, and other challenges separate from poor OL engagement arise, knowledge created within and about this COP solution can be repurposed for new unknown uses where different solutions are required.

Plan Limitations

Although this implementation plan is informed by seminal and contemporary literature, first hand contextual observations of an internal employee and doctorate level inquiry, there are potential competence, informal leadership, and resource limitations to thoughtfully consider. First, this author has demonstrated ability in large group learning facilitation and research knowledge-experience with team leadership learning practices helping a COP solution to succeed; still, awareness about limited experience executing an OIP of this scope is not lost.

Second, communities of practice are a new territory for this COP facilitator and personal research conducted about them and effectively leading them has likely only scratched the surface. Finally, many initial task responsibilities in the plan are delegated to this author and informal leader who may lack physical resource capacity or legitimate influence to complete all that is asked.

Rather than be discouraged or defeated by potential limits of the plan, this information increases awareness about possible knowledge, skill, and resource gaps requiring attentive risk monitoring or additional support if the high OL engagement change is to be institutionalized long term. It must also be remembered that the COP solution proposed by this informal leader is a small but important incremental first step lending practical support to larger structural and supportive learning culture changes also enabling high OL engagement. As the plan evolves, personal faith in hard work already forwarded coupled with the leadership-followership support of this OIP and the CHI health initiative already witnessed provides encouragement that this COP solution ripple can perpetuate an eventual even higher OL engagement change wave to succeed.

The previous section has detailed implementation plan specifics for the community of practice solution to improve OL engagement at Organization X. This plan informed through pragmatic and social constructivist lenses provided many practical, logistical, experiential, and environmental COP considerations with attention to also maximizing the relational learning possibilities of COP members to grow within and impact their organizational environment. These included attending to core elements necessary for COP success such as connectivity, interdependent membership, projects and informal leadership which can help overcome existing structural barriers like excess control, siloed work organization, and limited opportunities for

collaborative problem solving, knowledge sharing and use. The important need to create and store COP artifacts was mentioned as a means to demonstrate COP value and also build deeper trust in the informally lead community. Trust and artifacts were said to be important for increasing change gain momentum, eventual institutionalization and also attend to the accountable need to capture and share forward OL happening in the COP. Leveraging existing technological resources as a means to facilitate artifact storage-use or more broadly disseminate connected communication capabilities or COP events were also mentioned. The COPs integrated domain and specific purpose were also elicited as a first priority so interdependent stakeholders can identify with the community and see value in the solution's ability and intent to achieve common goal balance important to employee growth, OL engagement, and the organization's performance priorities as a whole.

Specific attention to these necessary COP core components and common value adds is similarly paid in the upcoming monitoring-evaluation and communication sections where specific survey tools are used to collect COP process monitoring-evaluation data that will also be used to capture and communicate COP add value information.

Change Process Monitoring and Evaluation

The following section discusses a pragmatic and social constructivist informed monitoring-evaluation framework for the COP solution with emphasis placed on highlighting its impacts on OL engagement as a whole. Using these lenses, the framework attends to key variables comprising supportive learning culture, engagement indicators, and evidence informed tools used to measure, adjust and report on them. Quantitative-qualitative monitoring data informing iterative COP implementation decisions are elicited with intended purposes of

facilitating a solution through collective learning that can be feasibly adjusted, sustainably maintained, and grow to larger ambitions (Torres & Preskill, 2001).

Learning evaluation is too frequently focused on whether something did work rather than on potentially more important questions targeting why a learning solution worked or how it is currently working (Cianciolo & Regehr, 2019; Haji, Morin, & Parker, 2013). Determining these combined monitoring- evaluative considerations can be guided by “reflexive monitoring” (Wood, 2017, p. 36) of change solution processes which requires implementation efforts to be re-assessed early and ongoing through both formal and informal data collection. High reliability team leadership practices of continuously monitoring and re-evaluating important information to improve collective situational awareness, team learning, and problem solving (Salas, Cooke, Rosen, 2008) is also consistent with this approach. In a similar vein, transparency and unbiased data collection, synthesis, and reporting is sought in the monitoring-evaluation strategy and further demonstrates authentic leadership. Iterative and responsive monitoring is also necessary to identify OL engagement solution failures early so timely modifications can be made (Cawsey et al., 2016). Also, a concurrent, integrative OIP evaluation-monitoring strategy allows for quick identification of change successes so they can be leveraged and communicated as short term wins and thus momentum successfully built from them (Kotter, 1996).

Unpacking OL Engagement Indicators

OL engagement was defined in this OIP as energized immersion in learning, evidenced through various and sometimes overlapping cognitive, socio-relational, behavioral, and agentic indicators (Azevedo, 2015; Henrie, Halverson, & Graham, 2015; Nägele & Stalder, 2018). Cognitive learning immersion involves difficult to observe cerebral processes indicated by genuine curiosity or interest in a topic and higher order analysis-synthesis thinking efforts about

it (Azevedo, 2015; Henrie et al., 2015). Socio-relational learning engagement includes active pursuits to share information with others and through communicative effort, make sense of, interpret, challenge existing assumptions, and generate new meanings in relation to collective environmental experiences (Azevedo, 2015; Henrie et al., 2015). Behavioral expressions of learning engagement are increasingly observable outputs that include tacit expressions of knowledge evidenced in human practices of using it (Henrie et al., 2015). Behavioral learning engagement can also be quantified by time spent on learning tasks or measured in outputs such as learning artifacts and tools created or shared as newly generated knowledge is determined applicable for use (Azevedo, 2015; Henrie et al., 2015). Agentic learning engagement refers to self or social organizing actions (Azevedo, 2015) spurred by new beliefs, assumptions, or values developed in learning process. Assessing both COP value and resulting OL engagement is difficult and requires framing an evaluation strategy demonstrating socially constructed learning value in creative and non-traditional ways (Carvalho-Filho & Steinert, 2019; Wenger & Snyder, 2000; Wenger, Trayner, & De Laat, 2011).

[Appendix A](#) at the end of this document illustrates these different OL engagement indicators in relation to COP solution processes and outputs as well as tools used to monitor and evaluate them. It also depicts monitoring-evaluation metrics displayed in an OL engagement trajectory starting at individual cognition and elevating towards agentic engagement as indicators become increasingly meaningful to employees, Organization X and the problem at hand.

COP Monitoring

Professional development changes such as OL happening in a COP are influenced by leaders who identify and adequately address needs of participants through direct inquiry and observation as experimental interventions are implemented (Dudar et al., 2017). Given that the

COP concept is new to Organization X, using experimental observations and stakeholder feedback to learn what works or does not in PDSA cycles, and recording these processes to learn more, improve, and reproduce them successfully is important. Observing and obtaining feedback through initial pilot tests within this author's local team and then to larger COP processes and activities will identify key monitoring adjustments required. Feedback surveys described in this section transcribed and electronically distributed via Survey Gizmo will be used to collect this data and more importantly generate reports that capture community insights as the OL engagement change advances.

Verburg & Andriessen (2006) studied COP assessment practices and subsequently developed the 7 category, 29 item Community Assessment Toolkit (CAT) which will be used to monitor COP implementation and inform required solution adjustments. A majority of COP assessment research is done through case study observations and interviews (Wenger et al., 2011) where important findings are then difficult for others to extrapolate and generalize (Verburg & Andriessen, 2006). Instead, the CAT uses Likert measures to determine COP effectiveness at the individual, group, and organizational levels and can even be used to compare different COP groups within or among organizations (Verburg & Andriessen, 2006). The CAT also integrates the discipline of knowledge management into COP assessment, given the dual need to capture easily transferred explicit knowledge and also code more elusive implicit knowledge shared in COP dialogue or project work (Ingvaldsen, 2015; Verburg & Andriessen, 2006). The CAT is a comprehensive tool that includes categories for monitoring COP facilitators and modifications required of themselves as leaders, diminishing participation of members, poor social connectivity of the group, and individual motivations for taking part in the community. Thus, the tool not only appears useful for monitoring COP goals, leadership activities, and other

logistics, its categorized items similarly alert this author to aspects of cognitive, socio-relational, and behavioral OL engagement deemed important to the problem of this OIP. Deployment of the CAT tool and analysis of results will be assumed by core facilitators of the COP to minimize potential individual bias in data collection and reporting results. Further details about CAT monitoring frequency and what this data can be used to iteratively monitor for and adapt in the COP are depicted in [Appendix B](#).

The next section describes how the Dimensions of Learning Questionnaire (DOLQ), COP output data and the CHI survey tool, are used to creatively evaluate the COP solution's value as tied to indicators of OL engagement and positive impacts these can both have on Organization X.

Evaluating the COP and Organizational Impact

Learning acquisition and application are described as intangible assets influenced by learning culture which is comprised of variables equally challenging to describe and measure (Dickel & Luiz de Moura, 2017). Elements of supportive OL culture include providing continuous multiple learning opportunities, promoting open dialogue and inquiry, encouraging collaborative learning, using systems thinking and tools to capture-share knowledge, connecting employees to the external environment, and leadership that supports learning through empowerment (Crossan et al., 1999; Kim, Watkins, & Lu, 2017; Senge, 2006; Song, Chermack, & Kim, 2013; Watkins & Marsick, 1993). These supportive learning cultural requirements align well with elements described as necessary for COP solution success which also promote OL engagement, and will serve as key indicators helping guide the monitoring-evaluation of the COP solution.

The Dimensions of the Learning Organization Questionnaire (DLOQ) is a practical OL evaluation tool using these same precise indicators (Watkins & Marsick, 1993) of supportive

learning culture. It also measures elements undeniably linked to the stated purposes and components of the proposed COP solution, chosen team and authentic leadership practices mentioned to guide it, and specific contextual variables described as influential to the OL engagement problem at Organization X. DLOQ categories overlapping with supportive learning culture *and* the important OIP aspects just described include (a) Continuous learning; (b) Inquiry and dialogue; (c) Team learning; (d) Empowerment; (e) Embedded systems; (f) Systems connections; and (g) Strategic leadership (Watkins & Marsick, 1993). The DLOQ has been used to empirically correlate OL with various organizational outcomes such as employee satisfaction, interpersonal trust, team learning, financial performance, and leadership style (Song, Chermack, & Kim, 2013) in addition to demonstrating high reliability and validity when used across multiple industries, cultures, and languages (Watkins & Dirani, 2013). Given the DLOQ's comprehensiveness, rigor, and seemingly wide applicability there are calls to investigate its research capabilities broadly outside the human resources discipline (Song, Chermack, & Kim, 2013). This leaves DLOQ investigations specific to evaluating COP implementation *and* OL engagement a promising possibility. Using the DLOQ to evaluate the COP and seeing improved longitudinal results can represent progress impacts on Organization X's mission to lead educational excellence and live its stated collective values of respect, integrity, accountability, and collaboration.

Evaluation of the COP engagement solution will also include measuring specific value outputs at a more concrete and granular level. Given previous mentions of low accountability to record, feed forward, and use OL gained from project work or existing in performance appraisal documentation, tracking existence of all artifacts developed as a result of COP activities will be important. Not only can these artifacts potentially be used to inform best practices for other OL

activity outside the COP, they can serve as a means to demonstrate how strategic organizational priorities or employee learning goals were pursued and achieved. Evaluating COP artifacts will be accomplished through examining COP communication channels, the shared network drive, and after action review tool for their existence and then determining how their purpose or use forwarded any specific employee learning or organizational performance goals. Also the DLOQ indicators of system connections and strategic leadership would be useful evaluative measures of OL artifact use and accountability. Tracking and evaluating COP artifacts in these ways demonstrates accountability to feed forward OL for collective individual and organizational benefit and is thus also an agentic engagement indicator.

COPs also hold potential for internal and external network expansion and ability to bring people with diverse knowledge and skillsets together (Verburg & Andriessen, 2006; Wenger & Wenger-Trayner, 2015). Given the siloed structure used to coordinate Organization X's work activities and limited opportunity for collaborative OL across organizational boundaries, another success indicator evaluated in the COP solution will be diversity of membership representation and increased connectivity of employees from different parts of the organization. Tracking metrics such as attendance, member work roles, and frequency of communications in the COP web chat will provide evidence of this connectivity. Network expansion and connectedness across departments will also be evaluated using the DLOQ measures of team learning and systems connection which can provide evidence of increased OL engagement happening across the organization. This connectivity would similarly demonstrate movement towards the goal of Organization X living its collaboration value and also be a key indicator of improved socio-relational OL engagement.

Empowerment can be a key intrinsic motivator for participative engagement in COPs (Wenger, 2011) given the lack of formal rewards systems from managerial involvement (Kirkman et al., 2011) and is also a specific DLOQ category. Providing zero resistance from senior leadership and more importantly relinquishing formal control to actively support autonomous employee decision making over COP activities would be another success indicator of increasing empowerment. Empowerment would also demonstrate senior leadership removing barriers to OL and thus exercising their agentic engagement in support of the COP engagement solution.

COP value can also be evidenced in mere existence as a means to rapidly exchange knowledge, problem solve, and provide a social medium for dual exploitive-explorative knowledge pursuits (Verburg & Andriessen, 2006; Wenger, Trayner, & De Laat, 2011). As Dudar et al. (2017) explain, evolving attitudes about a change solution can come from first trying out a different approach and seeing direct results. This means that additional COP value adds and evaluative outcomes may not be outwardly apparent until community activities are implemented (Wenger et al., 2011). These evolving impacts can be iterated in qualitative narratives that capture the diversity of COP activities and thus make such value connections more explicit (Wenger et al., 2011). Collecting data in the form of testimonials or interviews can achieve this rich narrative data exchange (Wenger et al., 2011).

Lastly, rather than incorporate all evaluation tools from scratch, those already being used to track Organization X's comprehensive health initiative (CHI) will also be used. Specific metrics within the ongoing CHI surveys also shown to be antecedents of OL engagement such as trust, psychological safety, and empowered control over ones work will be important to capture, compare to DLOQ results, and leverage as COP change progress advances. Comparing CHI

results of active COP members against others in the organization can provide additional weight to an argument that the COP engagement solution is potentially advancing important organizational variables in the right direction.

The previous paragraphs described important data metrics to be monitored and evaluated in this OIP using both quantitative and qualitative measurement tools. It seems that data availability to inform monitoring-evaluation will not be in short supply; however, thoughtfully integrating and synthesizing these multiple findings is another potential challenge. An additional risk is that evaluation-monitoring data collected by these tools will be self-reported by COP members and thus risks selection and convenience biases (Verburg & Andriessen, 2006; Wenger et al., 2011). As change evolves it will be important to thoughtfully organize and review these findings in a constant comparative approach during implementation and also to validate findings with stakeholders both inside and outside the COP. Triangulating and member checking collected data in this way can improve measurement validity and also help with discovery of common themes (Wenger et al., 2011). These themes will be important to report as successful outcomes or highlight threats to change implementation success. Integrating monitoring and evaluation data in order to effectively communicate these threats or successes requires further discussion in the next section of this OIP. Similarly, this monitoring-evaluation integration high level summary including tools used, metrics captured, and a proposed timeline for doing so can be seen in [Appendix B](#) at the end of this document.

Plan to Communicate the Need for Change and the Change Process

The organizational change literature mentions excellent communication as key to transformative success. Yet thoughtfully integrating evidence informed communications strategy alongside a change process is too often poorly considered (Argenti, Howell, & Beck, 2005;

Armenakis & Harris, 2002; Barrett, 2005; Heide, von Platen, Simonsson & Falkheimer, 2018). This section acknowledges this warning and describes how the rationale for improving OL engagement will be provided and also how the process of change and its evolving results will be communicated to stakeholders. Here, details of a structured plan to communicate about the proposed COP solution considers important messaging components of discrepancy, efficacy, appropriateness, principal support, and personal valence (Armenakis & Harris, 2002). The communications plan further considers tailoring messages to specific target audiences, making change ideas as relevant and accessible to the largest number possible (Heide et al., 2018; Klein, 1996). Lastly, communicating the change solution will involve different strategies and dissemination channels to help persuade, allow stakeholders to better understand change through active learning participation, and assist with managing information and communicative feedback loops (Armenakis & Harris, 2002). This structural goal directedness and open-transparent communications plan provides further evidence of team and authentic leadership required to support the organization as a whole and advance this OIP. Further, considering environmental life experience and evolved learning within the communications plan in addition to relationally empowering others to learn about and mobilize OL engagement change for collective benefit is informed again by pragmatic and social constructivist guidance.

Change communication plans can be organized according to different transitory phases of change (Armenakis & Harris, 2002; Klein, 1996). These broad phases include: *readiness*, where stakeholders become aware, recognize a need to close gaps and hopefully rally support to do so; *adoption*, which involves communicating solution implementation efforts and support to close those gaps; and *institutionalization*, where change adoption efforts are continually sustained and supported to becoming status quo operations (Armenakis & Harris, 2002). Change messaging

should be consistent and persuasive, providing continued motivation and support to stakeholders as they are first readied and then continually enabled to implement and eventually institutionalize what is required (Armenakis & Harris, 2002). The following paragraphs highlight how the OL engagement change will be communicated using important strategic messaging components within transitory change stages, while also considering target audience customization and the channels by which this messaging will be distributed and responded to.

Readiness

Communications during this phase of transition align with Kotter's (1996) recommendations during change steps of establishing urgency, building the guiding coalition, and communicating clearly shared vision so stakeholders buy-in. Messaging at this stage will be crafted to emphasize discrepancy so stakeholders are convinced the problem exists but also feel compelled to close gaps towards the future visionary state (Armenakis & Harris, 2002). Providing the future vision of a frontline workforce fully engaged and supported in OL with different reasons why this change is important to both leaders and employees establishes messaging discrepancy at the readiness stage. Exposing existing gaps or possible contributors to poor OL engagement requires communicating symptomatic data and problematic OL practices important to these different audiences. The data communicated for readiness includes exit interview resignation reasons, poorly accessed professional development funding, and also how bureaucratic structural realities (e.g. siloed business units) or excessive conservative control provide barriers to collaborative socio-relational engaged OL and its application. Establishing change message discrepancy will also include mentioning problem formulation and data validation efforts done early with senior leaders, middle managers, and in multiple conversations with various employees during initial OIP development.

Communicating a personal narrative of my own experience navigating the PD funding process, staying engaged to complete doctoral work over the past 3 years, and wanting to collaboratively share this knowledge forward with others will help bring this data and problem to life. Personal motivation dampers and barriers to socio-relational learning engagement mentioned will include performance-exploitive learning only culture emphasized in performance appraisal and PD funding processes. Similarly, having no expectation, formal accountability, or any recognition reward system in place motivating me to share this OIP forward will be highlighted. Lastly, having limited opportunity to create, share, or apply OL knowledge with other departments while realizing this is potentially important to improving work quality, reducing workload, or my potential for career growth and development will be mentioned as a personal frustration. Highlighting problem symptoms and potential contributors as integrated with an insiders' lived learning-working experience can help frame this problem and solution as relevant to employees (Heide et al., 2018) and also as discrepantly necessary or appropriate for management to tackle (Armenakis & Harris, 2002).

Adoption

Change messaging at the adoption phase will provide increasing detail about the COP solution to clarify goals or misconceptions about it, keep stakeholders continually informed about progress, and lend communicative support to facilitate solution activities (Armenakis & Harris, 2005; Heide et al. 2018; Klein, 1996). Messaging appropriateness and efficacy are important strategic considerations in the adoptions stage as they target skepticism about the solution's ability to actually close identified gaps and also build confidence in stakeholder ability to do what is required (Armenakis & Harris, 2002). Clearly communicating proper alignment between the problem and its contributing factors, all in contrasting reference to the small initial

scope, main purposes, activities, and potential value outputs of the COP solution will provide strong rationale for messaging appropriateness and efficacy.

At the adoption stage, COP solution messaging to frontline employees and potential core participants will include informing them about the purpose of the COP solution as well as other basics about how the community and its activities function. At a high level this information will be presented as an invite to informally come together every month, with intent to create and share knowledge as applicable to their immediate educational development work and explorative learning growth together. Heide et al. (2018) mention the importance of employee to employee communications to realize change goals and highlight high employee capability to actively exchange information without managerial involvement and solve problems. This point emphasizes that during solution adoption trust must be placed in these stakeholders' ability to take the change message, interpret it in their own way, and achieve positive results. Outlining the COP solution as a time feasible and simple means to collaboratively participate in OL activities can be a persuasive confidence builder in ability to have the solution succeed.

Building deeper confidence in solution and participant ability, change communications during adoption must also consider principal support. Principal support messaging helps establish belief that the solution is lasting as opposed to just another fad and reinforces that the resources required to implement change are available from all organizational levels (Armenakis & Harris, 2002). Principal support messaging targeting both frontline employees and formal leaders will involve making a public commitment by this author to help tackle the OL engagement problem and evidenced through core leadership of the initial COP solution. This commitment has already been demonstrated through years of work on this OIP but also more recently in personal performance appraisal goal documentation for the upcoming year. Principal

support messaging will also be contained within solution logistics documents and other artifacts (e.g. after action review, COP participant lists) as well as OL monitoring-evaluation data described earlier in this chapter. Actively pointing out how these COP solution processes and outputs using communication channels described later helps attend to principal support during adoption and institutionalization phases.

Principal support messaging will also include communicating COP readiness and adoption information directly with the organization's formal leaders. Presentations followed by question-answer sessions and follow-up information will be offered to middle and lower level management groups. Using the formal hierarchy to help relay change communications has strategic advantage, as authority is an expected and perceived legitimate means of receiving important organizational information (Heide et al., 2018; Klein, 1996). Communicating with and then hearing about the COP solution from management also indicates to employees that principal support from more than informal sources exists (Heide et al., 2018). Messaging from these formal leaders can help raise broader awareness and also potentially help identify and recruit participants for direct COP participation. Management allies also hold potential for disseminating solution information to their immediate reports, either directly or indirectly by potentially adopting COP learning engaged principals into their local team meetings.

Principal support messaging in the readiness and adoptions phases will also refer to collective commitments made in the organizations values, mission statements, and strategic priorities (e.g. attention to CHI initiative metrics, life-long learning) in addition to publically acknowledging senior leadership support of this OIP. Emphasizing how initial problem framing was first validated with senior leaders, middle managers, this author's local team, and other frontline employees in face-to-face conversations as OIP development progressed is important to

communicate. This validation served as an early monitoring input and provides further discrepancy, appropriateness, and principal support messaging that is valuable to solution readiness and adoption phases.

The messaging component of personal valence answers multi-stakeholder questions of “what’s in it for me?” (Armenakis & Harris, 2002, pg. 171) as communication is more likely to resonate when solution benefits are perceived to outweigh risks and that transition is worth the effort. Valence messaging will be differentiated among frontline staff and leaders; however, communicating COP value adds that also serve higher order common purposes have greater potential for unifying change support and solution momentum (Argenti et al., 2005; Kotter, 1996; Senge, 1990). Solution value adds communicated to employees will include a means to broaden their social learning networks and acquire collaborative knowledge resources that improve work quality or expand skillsets which improve employability. Frontline staff will also perceive value in communicating the COP’s ability to minimize individual problem solving efforts and workload or as the venue to explore new unknown solutions.

Managers can also be persuaded by communicating valence benefits of reducing their own coaching development workloads and now shared rather than solely controlled responsibility for OL engagement. Managers will also see solution value in improving their employees’ skillsets or as a means for them to resourcefully discover knowledge-skills required of different educational development work roles. This means to safely explore protean career possibilities without disrupting existing structure or dealing with an employee resigning to grow career opportunities is surely another COP selling feature.

Senior leaders will similarly require consistent valence messaging about the COP’s ability to provide a means to rapidly learning exploit and explore organizational problems

common across boundaries. Value propositions specifically targeting the senior leadership group also include the potential decrease to operational workload frustrations and excessive control perceptions highlighted in recent CHI data (Org X, 2019). Senior leaders will also hear about the COP as a complimentary support to resource intensive formal OL offerings already existing. Formal learning programs such as the internal leadership development program or employee secondments are good examples of existing OL activities that are difficult to schedule or integrate into existing structural routines but that would also synergistically benefit from successful COP existence.

Institutionalization

Communication during institutionalization of the COP solution will emphasize successes, corrected failures, and momentum building by spreading word to new employees (Armenakis & Harris, 2005; Barrett 2005; Klein, 1996) and others potentially interested in further adopting solution principles or leading alternate organizational COPs. Attentive observation to solution value outputs collected in evaluation, then providing news about how these (e.g. artifact creation-use, COP processes) are used to contribute to strategic priorities will be communicated to senior leaders during institutionalization. Ongoing communication about COP existence, its interactive logistics, and activities will be messaged to staff employees so those already aware of the change process are regularly informed of increasing value and new hires encouraged to participate. Lastly, this communications strategy also appreciates the value that messaging transparency will have throughout all change phases (Argenti et al., 2005; Heide et al., 2018; Klein, 1996) in that if OIP mistakes are made or something related to the problem, solution, or otherwise is unknown that these will be acknowledged immediately. Communication authenticity can also build trust (Mazutis & Slawinski, 2007), which, according to CHI metrics is currently lacking (Org X,

2019) and thus an important solution messaging priority. Although maintaining transparent communication may decrease efficacious belief in solution success, honest messaging can also spur supportive back-up action among those realizing high value in this change and who want to contribute to ongoing solutions.

Communication Channels

Messaging channels used for effective preparation and supportive adoption of the COP solution includes many different varieties with a preference for two-way, live group communications as opposed to mere information dumping (Argenti et al., 2005; Barrett, 2004; Heide et al., 2018; Klein, 1996). These channels will include a monthly intra-organizational news blog widely read by both formal leaders and frontline organizational stakeholders. In the readiness phase, this channel will be used to reinforce messaging appropriateness about the problem and this OIP, highlighting important OL benefits cited in the literature as well as reasons why Organization X given its specific mission, mandate and turbulent external environment should pay close attention to the topic. The blog story will also briefly introduce the engagement problem speaking to some personal struggles mentioned earlier. This blog introduction will conclude with open ended questioning in order to prompt two-way communications via the blog's discussions board feature. Asking stakeholders if and why the OL disengagement topic is important or relevant to them in early communications via web discussion will prompt initial interest and hopefully spur early reflections about others views of the problem and proposed solution.

The readiness messaging plan will be provided further details in planned live presentations followed by question and answer periods at Organization X's research forum as well as managerial and town-hall meeting communication channels. Also, as scholarly

publication is a highly valued communication source at the organization and may also be perceived as an important outside source of credibility, plans to publish a literature review about antecedents of OL engagement is also in the change communications cue.

In addition to ongoing use of the news blog, communication channels also used to support the solution adoption and institutionalization phases include those described in the monitoring-evaluation section of this chapter (e.g. internal email, WebX live chat, after action review) which help facilitate, coordinate and monitor COP activities. Also, the organization's shared network drive will be used as a channel to continually disseminate information about the COP's domain, its processes, activities and outputs. This drive will also be the channel used to categorize, store, and access all artifacts produced through COP activities. Routine quarterly communications via email about new COP artifacts or mentioning them face-to-face as real-time work issues surface will further make stakeholders aware of the COPs existence and value.

Table 3 below serves as a summary snapshot of the proposed communications plan, eliciting sample activities, communication channels planned for each, and suggested timeline according to high level phases of the OL engagement change.

Table 3.

Change Communications Plan

Change Phase	Timeline and Sample Activities	Channel
Readiness	0-3 months Continued validation and/or introduction of problem and COP solution to all stakeholders.	Face to face messaging Organizational blog Research forum Town-hall Peer reviewed journal
	3-12 months Start literature review on OL engagement with intent to publish in first year	
Adoption	6-12 months COP solution validation with members, COP communications support, data collect-report short term wins.	Organizational blog Managerial and unit team meetings COP facilitation channels (e.g WebX, email)
Institutionalization	12 months-ongoing Build momentum by communicating successes, information to newly emerging COPs, and integrate COP lessons learned information into other OL practices	Organizational blog Managerial and unit team meetings COP facilitation channels (e.g WebX, email, network drive)

The preceding summary table concludes the overall communications plan and the last remaining section that follows provides a high level summary of main points discussed throughout the OIP thus far. This concluding section reinforces the philosophic lenses used to frame the OIP in addition to the team and authentic leadership approaches chosen to advance it. The plan concludes with a summary discussion of main points covered throughout the OIP in addition to next step considerations advancing Organization X into a higher OL engagement visionary state.

Next Steps and Future Considerations

This OIP has examined the OL limited engagement problem at Organization X by providing rigorous analysis of literature, local and external context, intra-organizational data, and personal philosophical-observational assumptions. In addition, it establishes a theoretical and evidence informed change plan grounded in pragmatism, social constructivist learning, authentic and team leadership practices. Integrating these leadership approaches, philosophy, evidence, and context alongside a well-established change framework was also said to help collectively lead, measure, and communicate a feasible COP solution to improving the OL engagement problem. The remaining paragraphs conclude this plan with a discussion of notable contributions, limitations, reflections on the OIP development process, and possible considerations for the evolving future.

Contributions

In addition to providing workplace benefit, this OIP makes some contributions to the existing OL, education, and organizational leadership literature. Belle (2016) highlights the need to empirically examine active participation in organizational learning and suggests senior leader democratic governance as a means to achieve this participation and realize added OL value

benefits. This OIP also examines OL participation and leadership influence but to a deeper, distributed leadership, and followership focussed level. First, the plan attempts to unpack variables actually influencing active organizational learning participation among frontline employees and categorizes these into different cognitive, socio-relational, behavioral, and agentic engagement indicators. Examining indicators and potential antecedents of engagement is not only important to the evolving science of education and learning (Azevedo, 2015) the construct is also of research-practice interest to organizational leadership, organizational psychology, and workplace learning initiatives that best enhance it (Noe, Tews, & McConnell Dachner, 2010; Ryan & Deci, 2019). This OIP makes attempts to link these learning science and organizational learning-development interests by presenting improved OL engagement made possible by a community of practice solution integrated into existing bureaucracy and advanced through team and authentic leadership.

Also, given the mounting empirical evidence correlating high performance teams and optimized team learning processes with improved organizational outcomes across multiple industries (Barley, Treem, & Kuhn, 2018; Koeslag-Kreunen et al., 2018; O'Neill & Salas, 2018; Rebelo et al., 2019) coupled with broad recommendations for more distributed and decentralized leadership in educational institutions (Heide et al., 2018; Holboa et al., 2019; Nägele & Stalder, 2018) eliciting specific behaviours guiding teams towards these performance ends within the OIP is valuable. Specific team leadership practices described as essential in this OIP emphasize important evidence based contributions from high reliability team leadership and team learning literature primarily advanced outside the OL domain (Rebelo et al., 2019). Eliciting these behaviors with a focus on those that specifically optimize team learning and the environment necessary for OL engagement to flourish helps fill an important void identified in the literature

(Rebelo et al., 2019). It is hard to deny that both current and future leaders looking to effectively work in and among top performing global organizations will require knowledge about advancing such collaborative team performance and learning competency and therefore should find this OIP of interest and benefit.

Limitations

Although this plan makes important contributions, its limitations and future possibilities must also be stated. Limitations include the smaller capacity and potential unitary perspective of the work as produced by a single scholarly practitioner. Attempts to mitigate this bias and potential narrowed view included validating the problem, its contributing data and other aspects of the plan with multiple stakeholders at Organization X, as well as through ongoing feedback from many EdD professors and cohort peers travelling a similar OIP journey. Also, although many attempts were made at scoping the problem and its frames into laser focus, the OIP tackled and combined highly theoretical topics (e.g. OL, engagement) wrought with several current knowledge unknowns, conflicting definitions, and measurement challenges. Although these limitations may have decreased some specificity of direction for the plan, the work also sheds light on potential future research questions or new areas to explore applicable to a wide variety of disciplines. These include determining if combining a team-authentic leadership approach is effective at facilitating specific OL outcomes given transformational leadership is the most widely mentioned means said to do so (Xie, 2019). Also, engagement as a factor influencing *inter-organizational* learning would also be of interest to a wider leadership audience and raises the question about if OIP recommendations made here are also transferable to this context. At the very least, developing this OIP has provided many new reflective possibilities for this scholarly

practitioner to pursue in a career committed to lifelong learning and pursuit of positive leadership-followership practices that help me and others advance it.

Conclusion

OL engagement involves focussed dedicated interest, curiosity, and enjoyment in challenging work situations where those immersed *want* to push themselves beyond basic requirements rather than idly stand by (Nägele & Stalder, 2019). This engagement was also said to be spurred by fulfilling important human psychological needs of belonging, autonomy, and competence all empirically correlated with personal growth, workplace well-being and higher performance (Ryan & Deci, 2019). These learning growth, needs fulfillment, and performance desires are also a strategic priority of Organization X's CHI initiative, yet analysis forwarded in this OIP suggests that authentic and team leadership advancing OIP ideals could lend greater support to this initiative compared to leadership approaches that currently exist. The purpose and guiding values underpinning this OIP closely relate to advancing these important life-long learning appreciations and employee need or goal fulfilling pursuits, so both Organization X and the people within it evolve in concert to their fullest potentials. Senge and colleagues (2015) also assert that maintaining allegiance to such collective values important to everyone and advanced through distributed leadership within the organizational system is key to "shift the conditions through which others especially those who have a problem can learn collectively to make progress against it" (p.28).

Like others, this OIP argued that a focus on improving engagement can be a deciding factor determining the success or failure of OL (Belle, 2016; Noe et al., 2010) and that this strategy even if implemented in a small initial COP dose could have lasting reach and important impacts to people and throughout all organizational levels. Although people can exhibit

behavioral change without being engaged by something, those who are engaged cannot help themselves and sometimes consciously need to hold back (Azevedo, 2015). Such claims encourage this scholarly practitioner and informal leader that moving forward OIP ideas presented and hard work that remains will be fueled with continued intrinsic motivations making it all possible. Similarly, building a collective organizational commitment to highly engaging employees in OL will perpetuate and assist with these efforts, potentially leading to energized human action and unstoppable learning growth momentum enabling a brighter and prosperous future for all stakeholders at Organization X and the broader societal community to which it is accountable and a part.

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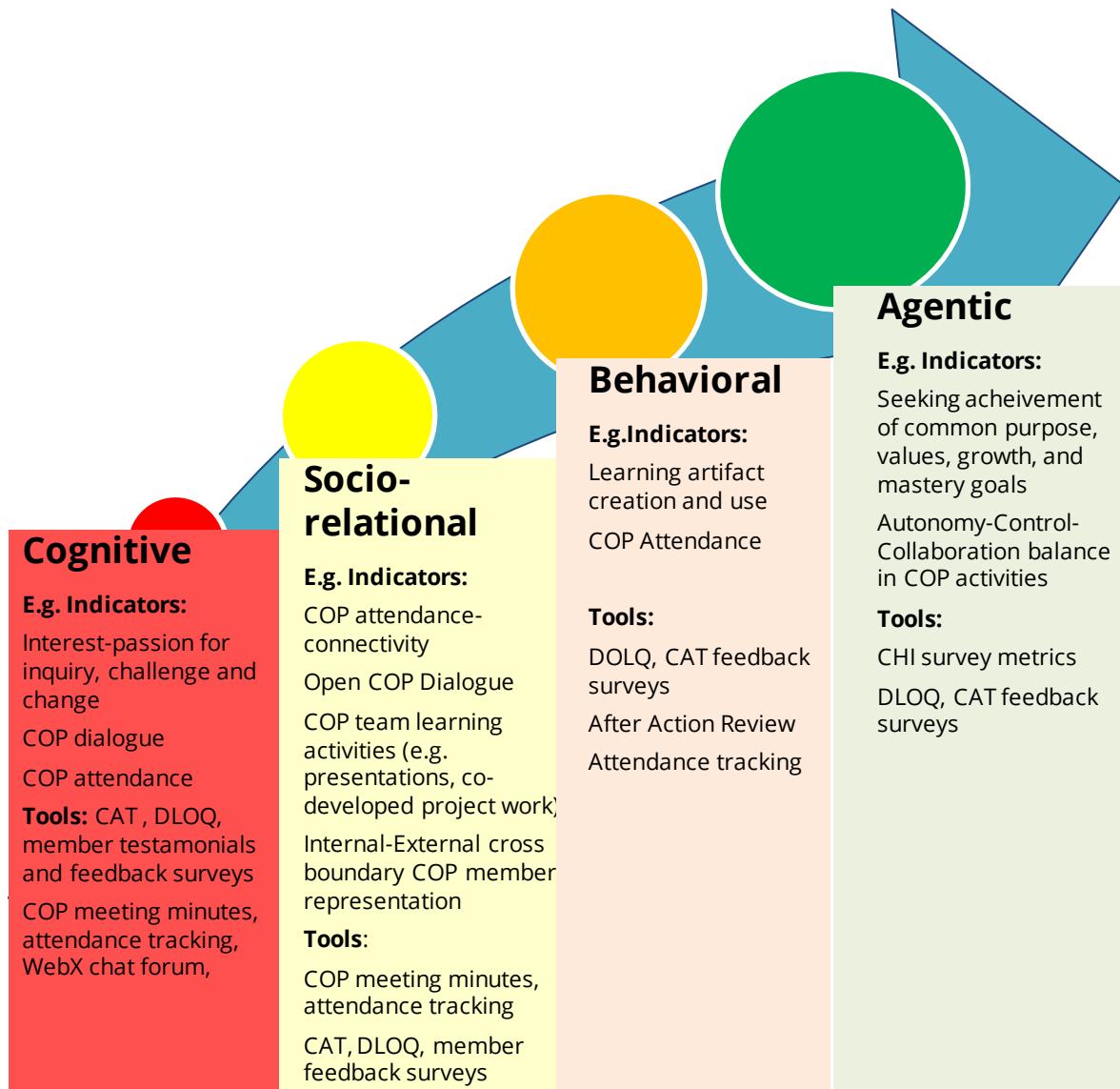
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Appendix A: OL Engagement Trajectory, Evaluation-Monitoring Indicators and Tools



Appendix B: Evaluation-Monitoring Tool Use

Monitoring-Evaluation Tool	Use and frequency	Tool data used to
COP meeting minutes, attendance records, testimonials	Monitor implementation issues bi-monthly	Monitor correct invitation strategy
	Evaluate participation, exploitive-explorative learning balance quarterly	Monitor appropriate diversity of membership and connectivity
Web X Chat board	Monitor use and COP communication frequency weekly	Monitor if appropriate asynchronous communication channel and connectivity
	Monitor new organizational challenges, potential COP topics monthly	Monitor appropriate just in time communication channel
	Evaluate use of COP artifacts or implementation of COP learning captured in after action review and learning coms protocol quarterly	Evaluate number of COP artifacts created, shared and used Monitor enabled connectivity between internal-external members
After action Review	Monitor OL happening in face to face COP meetings monthly	Monitor if tool appropriate to code-feed forward COP organizational learning (i.e. artifacts, symbols, tools, and tacit knowledge discussion
	Evaluate use of COP artifacts or implementation of COP learning quarterly	
DOLQ	Evaluate COP learning culture and OL engagement in relation to	Evaluate if COP results reflect movement towards existing strategic priorities

	organizational mission, values and strategic priorities semi-annually	<i>and</i> individual learning needs/goals Evaluate success of COP promoting achievement of both explorative-exploitive organizational learning goals
CAT questionnaire	Monitor implementation issues quarterly Monitor new organizational challenges potential COP topics quarterly	Monitor if appropriate tool to code COP organizational learning (i.e. explicit artifacts, symbols, tools, and tacit knowledge discussions Monitor effectiveness of learning discussions protocol, after action review method, team learning ground rules Evaluate if results reflect COP movement towards existing strategic priorities AND individual learning needs/goals
CHI survey metrics	Evaluate OL engagement antecedents of trust, psychological safety, autonomy over practice decision making annually	Evaluate if results reflect COP movement towards existing strategic priorities AND collective needs/goals
