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Making sense of employees' sensemaking: Evidence from a

multi-skilling project

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Declarations

I declare that the content of this thesis is entirely my own work and has not been submitted as part of any degree at another university.

Abstract

This study aims to expand Weick and his colleagues' (2005) sensemaking framework by exploring prospection, work role identity, and emotion in the sensemaking process. It adopts a qualitative case study approach and examines the sensemaking of employees (both professional and non-professional) during a multi-skilling project. The study reveals three forms of sensemaking, namely 'wide sensemaking', 'narrow sensemaking' and 'ambivalent sensemaking', depending on the dynamics among prospection, work role identity, emotion in sensemaking.

The study finds that people's sensemaking is affected by the disparity between the core attributes in their initial work role identity and those in the newly designed role of a multi-skilling project. Moreover, this study extends theories of prospection in sensemaking, arguing that people experiencing different disparity between their original work role identity and the work role identity associated with the Project display different patterns of prospective sensemaking.

In addition, the thesis considers emotion in sensemaking, which was induced from the data. Emotions elicited in sensemaking affect the selection of anomalies as sensemaking cues, and indicate the need for identity work. Furthermore, in making sense of a multi-skilling project the valence and intensity of emotions elicited are determined by the level of difficulty to restore to one's acceptable work role identity.

Chapter 1 Introduction

1.1. Introduction

This study was originally framed to examine the initiation, development, and diffusion of a change initiative, i.e., the multi-skilling project. However, I was intrigued by people's different reactions to the multi-skilling project despite their occupational groups. Thus, I referred back to the extant literature for more conceptual insights, and with iterative data analysis, I found sensemaking perspective most useful to explain how and why employees react differently to a common experience.

The multi-skilling project in this study brings changes to people's existing role and daily activities, and thus induces uncertainty and ambiguity to their routine activities. Meanwhile, uncertainty and ambiguity are "common sensemaking occasions" (Weick, 1995: 91; Patriotta and Brown, 2003; Weick *et al.*, 2005). Therefore, sensemaking perspective is well suited to study how people navigate their way through the complex change initiative, the multi-skilling project, and guide their actions in time of equivocality (Weick, 1995; Patriotta, 2003; Klein *et al.*, 2007; Kumar and Patriotta, 2011; Maitlis and Christianson, 2014).

Nevertheless, I found that the current theories on sensemaking could not fully explain what was happening in the field. Therefore, this research focuses on prospective sensemaking and work role identity in sensemaking to examine how and why employees react differently to a common experience. Emotion is also induced from the data to enrich the sensemaking process. The rationales for focusing on prospection, work role identity, and emotion are detailed as follows.

Despite the attempt to study prospection in sensemaking, existing research has missed the theorisation in prospective sensemaking (Gioia and Mehra, 1996; Weick *et al.*, 2005; Gephart *et al.*, 2010). A study examining prospection in sensemaking is a fruitful line of enquiry, since prospection is prevalent in organisational change (Stigliani and Ravasi, 2012). Questions such as how and why employees engage in prospective sensemaking can provide further insights to this endeavour.

Moreover, in his seminal work on sensemaking, Weick (1995) gives central importance to identity by placing it as the first of seven properties of sensemaking. Indeed, he argues that identity is the focal point of sensemaking. However, despite the fruitful study of generic identity and sensemaking (Weick *et al.*, 2005; Helms-Mills, 2003), researchers find that people might identify more with 'lower order identity' such as work role identity and professional identity, compared to 'higher order identity' such as organisational identity (Ashforth *et al.*, 2008: 352-353).

Also, organisational behaviour research has been left out of the research on occupation, which is central to one's identity at work (Ashforth *et al.*, 2008: 351). Maitlis and Christianson (2014) also claim that there is a need to conduct more research on the sensemaking process of people experiencing identity change, especially within the workplace. They find that previous research mainly focuses on the sensemaking of individuals who go through major changes, such as trauma and loss in their personal lives (Maitlis, 2009; Wainwright and Turner, 2004, 2006).

In addition, work role identity is not restricted to certain professions, and could be used to study all staff groups going through the same change. Given the presence of both professional

and non-professional workers in organisations, work role identity not only helps to understand how employees make sense of a change initiative, but can also be utilised to compare sensemaking across these different staff groups.

Therefore, this research examines how and why employees differ in their sensemaking in relation to common experience. The current research plans to provide answers by investigating the following two research questions: 1) How and why do employees engage in prospective sensemaking? 2) How does work role identity affect sensemaking?

While conducting the fieldwork, I noticed that employees revealed emotions in relation to certain aspects of their old and new roles, as shown in Chapters 5 and 6. Thus, emotion in sensemaking, induced from data collection in this study, is analysed and theorized in the discussion chapter (Chapter 7) to enrich understanding of the sensemaking process (Myers, 2007; Maitlis and Christianson, 2014).

1.2. Research context

This research adopts a qualitative case study approach to examine the sensemaking of frontline employees. The literature on sensemaking and organisational change has mostly been concerned with managers (Sonenshein, 2010; Balogun and Johnson, 2004; 2005), and frontline employees are often overlooked (Bartunek *et al.*, 2006). A study of employee sensemaking will thus be beneficial, since they are the ones that implement change (George and Jones, 2001; Bartunek *et al.*, 2006).

This study adopts a qualitative case study research to address the above-mentioned questions, since both qualitative research and the case study approach are the most suitable for exploring how and why questions. Moreover, qualitative research focuses on "the interpretive

understanding of human experience" (Denzin and Lincoln, 2008: 10), which involves the informants' sensemaking of a particular event and how they view their work role identities.

A case study approach is deemed to be the most appropriate to investigate complex and dynamic processes (Thorpe and Holt, 2008; Denscombe, 2010), especially exploring the relationship between organisational behaviour, process, and context (Hartley, 2004). In addition, a case study can be used to discover new themes, build theory, and understand everyday practice (Hartley, 2004). Due to the limited research on the relationship between work role identity and sensemaking and prospective sensemaking, new themes and theories are likely to emerge during this study.

The multi-skilling project adopted in this thesis is referred to as "the Project" hereafter, for simplicity and anonymity. The Project is drawn from the housing department in the English public sector, where both health professionals and less professionalised groups exist. It requires staff across different groups to learn and take roles that had previously been done by different professional and occupational groups. The Project encountered different reactions from not only different frontline employees but also the same employee across two different study periods (Time Period 1 and Time Period 2).

The Project brings changes to employees' roles, and provides an ideal context to study work role identity and employees' sensemaking about the project, and therefore, can offer theoretical insights into the study of work role identity and sensemaking. Moreover, emotions are also elicited in the sensemaking of the Project, as detailed in Chapter 4. Thus, the Project could be utilised to explore the dynamics between emotion and sensemaking and extend the emergent theory on emotion and sensemaking. Moreover, the comparison between

employees' prospective sensemaking in Time Period 1 and Time Period 2 might offer some insights to the theorisation of prospective sensemaking.

I conducted 43 semi-structured interviews over three time periods (Appendix 1). The initial eight interviews were intended to help me familiarise with the Project and frame the research (Time Period 0). Interviews conducted in Time Period 1 and Time Period 2 focused on people's roles before and after the Project, as well as their views of the Project. There is a one-year gap between Time Period 1 and Time Period 2. The main reason for the year's gap is to reveal possible changes in people's views of the Project.

Moreover, I also observed four team meetings, one training session, and one conference as well as one consultation meeting with all staff and managers, totalling 26 hours of observation (Appendix 2). In addition, documents relevant to this study, such as meeting minutes, training documents, and job description documents, were also collected and analysed.

1.3. Contributions

This thesis contributes to literature on sensemaking in the following three aspects, these being prospective sensemaking, the dynamics between work role identity and sensemaking, and emotion in sensemaking. Specifically, it answers the question of how employees engage in prospective sensemaking and reveals different patterns of prospective sensemaking, that is, future-oriented prospective sensemaking and past-oriented prospective sensemaking. The study also goes further by analysing why people engage in prospective sensemaking.

Moreover, based on previous research carried out in identity and sensemaking (Ellemers *et*

al., 2002; Ibarra, 1999; 2007; Petriglieri, 2011), this study explores the dynamics between work role identity and sensemaking. Three dynamics between work role identity and sensemaking are revealed, these being enhanced role identity, threatened role identity, and mixed impact on role identity.

In addition, this study explores the dynamics between emotions and sensemaking. Emotions in this study are examined in terms of its valence and intensity, following scholars in emotion and sensemaking (Maitlis *et al.*, 2013; Maitlis and Liu, 2014). The study further explains why emotion impact on sensemaking and shows the indicating role of emotion in one's sensemaking of a change initiative.

Based on the study findings, three forms of sensemaking are identified, namely wide sensemaking, narrow sensemaking, and ambivalent sensemaking. Chapter 8 further discusses these three forms of sensemaking. In addition to theoretical contributions, I also point out the implications of this research to health and social care sector. Moreover, this study examines the less explored employees' sensemaking and suggests managers to be aware of possible changes in employees' work role identity and emotions in a change initiative as well as the potential influences of prospective sensemaking in practice.

1.4. Thesis structure

Chapter 2 firstly reviews the existing literature on sensemaking and organisational change (Balogun and Johnson, 2004; 2005; Sonenshein, 2010). On the basis of this review, the research focus is narrowed down to examine prospection (Chapter 2) and work role identity (Chapter 3) in employees' sensemaking.

Chapter 3 discusses work role identity and sensemaking, drawing on the current debate on identity, professional identity and sensemaking (Ashforth, 2001; Ashforth *et al.*, 2008; Petriglieri, 2011; Vough *et al.*, 2015). The similarities and differences between role identity and professional identity are outlined, so as to lay the foundations for later analysis. As mentioned earlier, emotion is induced from data analysis; nevertheless, to lay a foundation for theorising emotion in sensemaking, I also introduce the relevant literature about emotion and sensemaking in Chapter 3.

Chapter 4 sets out the context of the study---the Project. The Project brings together four groups, these being the Occupational Therapist (OT), the Occupational Therapist Assistant (OTA), the Case Worker (CW), and the Technical Officer (TO). With the Project, all staff are doing the same job, and the OTA, the CW, and the TO are given the new title of Housing Assessment Officer (HAO). However, the job title of the OT remains the same, and the OTs are only responsible for more complex cases compared to the HAOs. Chapter 4 further discusses the methodology, research methods, and analytical approach adopted by the study.

Chapters 5 and 6 present the analysis of the interview accounts, observations, and documents. Chapter 5 lists the analytical stories of the OTs and the OTAs, while Chapter 6 focuses on the CWs, the TO and the HAOs. Chapters 5 and 6 emphasise the individuals' sensemaking of the Project with regard to individual's prospective sensemaking, work role identity, and their emotions towards their roles prior to and after the Project.

Chapter 7 discusses the findings presented in Chapters 5 and 6, and draws up a conceptual framework that incorporates work role identity and emotion into the sensemaking process. The roles of prospection in sensemaking are also discussed.

By combining the effect of work role identity, prospection, and emotion in sensemaking, three forms of sensemaking are identified in Chapter 8, these being wide sensemaking, narrow sensemaking, and ambivalent sensemaking. This chapter further provides suggestions for future study and points out the limitations of this research. For example, given the tentativeness of emotion theorised in sensemaking, future research may focus on designing a study in similar settings and focusing the research primarily on the dynamics between emotion and sensemaking.

Chapter 2 Sensemaking

2.1. Introduction

This chapter reviews the literature on sensemaking. It is organised as follows. The definition of sensemaking is firstly presented and discussed. Then, the chapter introduces extant research on prospection in sensemaking. Following this, employees' sensemaking about organisational change is reviewed, with regards to studies on sensemaking and organisational change. The final section summarises the chapter and introduces the next chapter, which examines work role identity and sensemaking.

2.2. Sensemaking

Sensemaking was firstly examined in Weick's early work, *The Social Psychology of Organising* (1969). Early works on sensemaking focus on the cognitive process of sensemaking (Kiesler & Sproull, 1982; Daft & Weick, 1984; Starbuck & Milliken, 1988). Sensemaking was further established in his 1995 book, *Sensemaking in Organisations* (Weick, 1995), which illustrates its seven properties. According to Weick (1995: 17), sensemaking is "(1) grounded in identity construction, (2) retrospective, (3) enactive of sensible environments, (4) social, (5) ongoing, (6) focused on and by extracted cues, (7) driven by plausibility rather than accuracy". The following section explains the seven properties to present a full picture of what sensemaking entails.

Sensemaking seeks to answer the question 'what is the story', whereas the study of identity in sensemaking provides an answer to 'how I fit into the story' (Cunliffe and Coupland, 2011; Chreim, 2002). Identity lies "at the root of sensemaking, and influences how other aspects or

properties of the sensemaking process are understood" (Helms-Mills, 2003: 55). In his seminal work on sensemaking, Weick (1995) also gives central importance to identity by placing it as the first of seven properties of sensemaking, and contends that identity is the focal point of sensemaking. Similarly, Pratt (2000: 484) asserts, "one's identity has been seen as the lens through which one makes sense of the world". Brown *et al.* (2008) also argue that sensemaking is a process of individual identity construction and reconstruction. Chapter 3 discusses the literature on identity and sensemaking in further detail.

As an ongoing activity, sensemaking has no start or end point; however, sensemaking activities are more visible, and can be studied when the ongoing flow is interrupted (Weick, 1995; Patriotta and Brown, 2011). The sensemaking of individuals becomes salient when people encounter a new phenomenon or experience an interruption (Louis, 1980; Patriotta, 2003; Weick *et al.*, 2005). Gioia and Mehra (1996) note, sensemaking is ongoing, and includes both unconscious and conscious sensemaking. Furthermore, sensemaking is a recurring process. Based on the first round outcome of sensemaking and one's own existing knowledge, individuals make sense of the new environment, and the sensemaking process carries on (Balogun and Johnson, 2005).

Interruption to the flow disrupts one's normal activities, violates expectations, and creates cues that may be selected for one's sensemaking. Weick (1995: 49) argues, sensemaking is "focused on and by extracted cues". The selection and deselection of certain cues affect one's sensemaking and their attitudes towards certain happenings (Maitlis *et al.*, 2013).

Through retrospection (Weick *et al.*, 2005) and prospection (Gephart *et al.*, 2010; Gioia and Mehra 1996), certain cues are extracted to construct a reality. Gioia and Mehra (1996)

emphasise the importance of prospection in studying sensemaking. They argue that imagining the future can help individuals to organise their current life and guide their actions (Gioia and Mehra, 1996: 1229). However, in a later critique, Gioia (2006) refutes the notion of prospective sensemaking, arguing that prospection in sensemaking is difficult to conceptualise, and offers little theoretical contribution. The contradictory view and lack of theorisation on prospective sensemaking call for a thorough investigation of prospection in sensemaking, which is covered in Section 2.3.

Sensemaking is influenced by others, despite them being "imagined or physically present" (Weick, 1995: 39). Sensemaking is inherently social, and involves an intersubjective meaning of a particular situation (Balogun and Johnson, 2004). Some scholars view sensemaking as collective, and highlight the social aspect of collective sensemaking (Weick *et al.*, 2005; Maitlis, 2005; Cornelissen *et al.*, 2014). Moreover, systemic factors affect one's sensemaking, since a social context is intrinsically associated with systemic substrates, and the norms and expectations entailed in the system might influence one's sensemaking (Weick *et al.*, 2005).

Sensemaking elicits actions which seek meanings from the interrupted flow and enact order into the flux (Weick *et al.*, 2005; Maitlis, 2005). The actions taken by individuals, in turn, adjust one's existing schema, shape the environment, and determine the cues noticed and selected for sensemaking (Maitlis and Christianson, 2014). For example, physicians might conduct or issue certain examinations to patients to determine their conditions (Rudolph *et al.*, 2009).

Maitlis and Christianson (2014: 67) review the sensemaking literature to provide an integrated definition of sensemaking. According to them, sensemaking is "a process

prompted by violated expectations, that involves attending to and bracketing cues in the environment, creating intersubjective meaning through cycles of interpretation and action, thereby enacting a more ordered environment from which further cues can be drawn". This synthesized definition reflects all seven properties of sensemaking, with the exception of identity.

The definition given by Weick and his colleagues (2005) may complement the above-synthesised definition of sensemaking. According to Weick *et al*. (2005: 409), sensemaking "unfolds as a sequence in which people concerned with identity in the social context of other actors engage ongoing circumstances from which they extract cues and make plausible sense retrospectively, while enacting more or less order into those ongoing circumstances". As noted earlier, the prospective dimension of sensemaking is missing in the Weickian approach. A study on prospective sensemaking might enrich theories of sensemaking and organisational change.

In addition, Weick's cognitive approach to sensemaking has received some criticism from scholars (Gioia and Mehra, 1996). Gioia and Mehra (1996) argue that Weick's work (1969) needs to pay more attention to emotion in the sensemaking process, rather than being a simple mentioning of the notion. In his later work (Weick *et al*., 2005), Weick recognises this shortcoming, and calls for more research on emotions in sensemaking. Other scholars also echo this criticism, and seek to bridge the gap in the research of emotion and sensemaking (Maitlis *et al*., 2013; Myers, 2007; Walsh and Bartunek, 2011). Emotion in sensemaking is discussed later in Chapter 3 section 3.5.

Based on the discussion of the seven properties of sensemaking proposed by Weick (1995),

and with regard to the definition given by Weick *et al.*, (2005) and Maitlis and Christianson (2014), it is possible to recognise, that as an ongoing flow, sensemaking is infused with emotion and affected by social interactions. Also, identity matters in sensemaking, and how people react to the anomalies they notice influence their sensemaking. Lastly, sensemaking seeks to produce a plausible story, which is formed through retrospection and prospection.

The aim of this thesis is to examine prospection (Chapter 2), work role identity (Chapter 3), and emotion in sensemaking (Chapter 3), based on the sensemaking framework developed by Weick and his colleagues (2005). Before moving on to the three specific elements of sensemaking, I will firstly explain the sensemaking framework developed by Weick and his colleagues (2005).

Weick and his colleagues (2005) posit three stages of sensemaking: enactment, selection, and retention. The enactment stage provides an opportunity for individuals to "construct, rearrange, single out, and demolish many objective features of their surroundings" (Weick *et al.*, 2005). The account in enactment stage is relatively inclusive, crude, and open to interpretation (Weick *et al.*, 2005). Enactment includes the sensemaking activities of noticing irregularities, enacting order into ambiguity, and being influenced by external factors.

At the selection stage, the main question is to identify the story (Weick *et al.*, 2005). As a result of noticing, a number of interpretations of the ecological change are presented, and through retrospection, meanings are selected to form presumptions (Weick *et al.*, 2005). The retention stage requires certain selected interpretations to be adopted as the rationale for decision-making. The initial presumption is affected by social and systemic factors, leading to the production of a plausible story. Moreover, the plausible story is constructed through

several rounds of the sensemaking process. Balogun and Johnson (2005) examine the sensemaking of middle managers in an organisational change from hierarchical to flat and demonstrated the cyclical pattern of sensemaking through detailed studies of three time periods.

Balogun and Johnson (2005) focus on the relationships among old schemata, sensemaking triggers, social interaction, change outcomes, and new schemata. According to them, old schemata serve as a foundation for the sensemaking process, which is influenced by social interaction. Making sense of organisational change leads to the development of a new schema, which in turn acts as a basis for a new round of sensemaking. Across the three study periods, different triggers initiate the sensemaking process, through horizontal social interaction between senior and middle managers, and vertical social interaction among middle managers across the three divisions. Middle managers' old schema of a common goal develops to different schemata, and results in different change outcomes.

The following sections firstly review existing research on prospection in sensemaking. Then, the necessity of studies on employees' sensemaking about organisational change is pointed out, with due respect to the existing literature on sensemaking and organisational change in general.

2.3. Prospective sensemaking

Future-oriented or prospective sensemaking is defined as "sensemaking that seeks to construct inter-subjective meanings, images, and schemes in conversation where these meanings and interpretations create or project images of future objects and phenomena" (Gephart *et al.*, 2010: 285). Gephart *et al.* (2010) carry out a detailed review of future-

oriented sensemaking, with a focus on the relationship between future-oriented sensemaking and institutional legitimation. They point out the essential role of the past and present in providing context for future-oriented sensemaking. Other scholars also emphasise the importance of prospection in studying sensemaking (Gioia and Mehra, 1996; Gephart *et al*., 2010; Sandberg and Tsoukas, 2015). Gioia and Mehra (1996: 1229) argue that prospective sensemaking may be achieved by imagining the future, which can help individuals to organise their current life and guide their actions.

Weick and his colleagues (2005) also argue that through retrospection, certain cues are extracted to construct a plausible meaning. He mentions prospection in sensemaking and argues that prospective sensemaking is to think in "future perfect sense", which examines phenomenon "as if they have already occurred" (Weick, 1969: 66). Therefore, Weick acknowledges the existence of prospection in sensemaking and posits that prospective sensemaking is ultimately achieved through retrospection, which is also reflected in the famous sensemaking saying, "how can I know what I think until I see what I say?" (Weick, 1979: 5).

One of the criticisms of prospective sensemaking is proposed by Gioia (2006), who refutes the notion of prospective sensemaking, arguing that prospection in sensemaking is difficult to conceptualise, and offers little theoretical contribution. This study builds on this criticism and explores the theoretical contribution of prospection in one's sensemaking.

One other possible reason for the conflicted accounts of prospection in sensemaking might be the subject of study, i.e., Weick's work is mainly focused on crisis, whereas Gioia and Mehra (1996) focus on organisational change. Prospective sensemaking may be more prevalent in

organisational change compared to crisis. Unlike organisational change, crisis happens within a short time period, and people are not able to articulate and elaborate their understandings of certain situations or cues, and therefore, engage in prospective sensemaking (Stigliani and Ravasi, 2012).

Given the conflicting views and lack of theorisation of prospective sensemaking, it is necessary to carry out a study to explore the presence of prospective sensemaking and examine under what circumstances people engage in prospective sensemaking. As scholars point out, research on prospective sensemaking should go beyond the future perfect process and explore other ways prospection plays out in the sensemaking process (MacKay, 2009; Stigliani and Ravasi, 2012).

As mentioned, early works on prospective sensemaking focus on "future perfect" (Weick, 1995: 29). Although MacKay (2009) focuses his research on prospective sensemaking in strategic foresight literature, some of his thinking may be utilised to study prospective sensemaking. Prospection takes existing knowledge into consideration, rather than purely focusing on the ambiguous and uncertain future. Prospection has to draw on cues that exist in one's current knowledge and is based on previous occurring (MacKay, 2009). Thus, questions such as what are the cues that provide the knowledge for prospective sensemaking and why only certain cues are extracted for prospective sensemaking.

The previous literature also examines how prospective sensemaking is carried out. For example, Gioia and Mehra (1996) find that organisational change requires a change to one's core self, which is enabled by projecting an envisioned future identity. They argue that top managers view the issues of strategic change either as 'strategic' or 'political', depending on

how they perceive the organisation's changing identity. The key message that Gioia and Thomas (1996) deliver is that both existing identity and preferred future identity of top managers affect how they make sense of events in strategic change. According to Gioia and Thomas (1996: 1229), the key to prospective sensemaking is to "structure the future by imaging some desirable state". However, since the study focuses on the top management team, there might be a different story for employees. Section 2.5 discusses further the differences in sensemaking between managers and employees.

Stigliani and Ravasi (2012) emphasise the importance of retrospection in individual sensemaking, while indicate the prospective characteristic of collective sensemaking. As with Gioia and Thomas (1996), they assert that "forward-looking thinking" is crucial to prospective sensemaking (Stigliani and Ravasi, 2012: 1234). Stigliani and Ravasi (2012) develop a framework that connects individual and group level sensemaking with regard to future-oriented sensemaking. According to them, group-level prospective sensemaking involves four main stages, these being noticing and bracketing, articulating, elaborating, and influence. These four stages will be elaborated in the following paragraph.

Noticing and bracketing happen mostly at an individual level, whereby group members are presented with materials related to the group task. At this stage, individuals are at the preliminary stage in establishing their own individual sensemaking about the task (similar to the noticing and bracketing stage in the Weickian approach). The articulating stage is mainly to develop a group schema with regard to the task, which requires both individual and collective sensemaking. At the individual level, group members can learn each other's understandings of the materials used for the task. At the group level, individuals form a preliminary collection of the materials involved in the task. The elaborating stage finalises the

interpretation of the task through debate among group members, prospecting a desired relationship between the developer, the developed product, and the end user. The final influence stage is about sensegiving from product developer to end-user.

Stigliani and Ravasi (2012) add that articulation and elaboration are elements of prospective sensemaking at the group level. They also argue that the absence of articulation and elaboration in Weick's sensemaking framework is due to the context of Weick's study, a crisis situation. Stigliani and Ravasi (2012) argue that prospective collective sensemaking is reflected in three ways: that is, the interaction group members carried out via comparing existing schema and emerging sensemaking cues, the materialisation of the emerging cues, and the establishment of the emerging interpretations.

Nevertheless, the study carried out by Stigliani and Ravasi (2012) is based on the context of a group task, and might have missed prospective sensemaking from the individual level. A study examining prospection from individual level might provide some insight into the existence of prospective sensemaking and how prospective sensemaking is achieved.

A reanalysis of Pratt (2000) shows the role of prospection in sensemaking, although Pratt (2000) does not approach the identification and sensemaking of Amway distributors from prospective dimension of sensemaking. One of the schemes used by Amway in staff identification is that of dream building. Dream building presents organisation members with an ideal sense of self, which enables a comparison between one's current self and the ideal self. Dream building enables individuals to think in the future perfect sense and envision a desired future, so as to adjust the activities at present and align their sensemaking of the established distributors. Dream buildings activities serve as one of the drivers for Amway

distributors' successful adoption of the organisational values. Likewise, MacKay (2009) argues that future-oriented sensemaking may steer people towards a better performance in the future.

Bolander and Sandberg (2013) also reveal that the employee selection process is both retrospective and prospective. They find that the selectors retrospectively make sense of the selection decision based on the assessment of the applicant. However, in the decision making process, the selection committee discuss and revise their decisions on a particular candidate through "prospective forming of the future". That is, to be able to make sense of the future is a prerequisite for making sense of the past and the present, and prospective sensemaking can affect the interpretation of the past and might lead to reconstruction of history (Kaplan and Orlikowski, 2013).

Therefore, the sensemaking process is prospective and may produce different versions of the past and future (MacKay, 2009; Dougherty and Drumheller, 2006). The main reason that organisations engage in prospective sensemaking is that they wish to revise the past so as to be consistent with the present self and the desired future self (Gioia et al., 2002). Kaplan and Orlikowski (2013) also argue that aligning the past, present, and future interpretations of certain events could provide a coherent account for organisation members in organisational change, and therefore help to reduce the uncertainty and ambiguity people might face. Likewise, Engwall and Westling (2004) analyse how an R&D project gained sudden success after long time static development and emphasise the importance of a shared prospective sensemaking of the project future to the success of a certain initiative.

Moreover, people often differ in interpreting past, present and future, and therefore, how

people engage in prospective and retrospective sensemaking might determine how they make sense of a particular change initiative (Kaplan and Orlikowski, 2013). This thesis thus examines how people differ in their prospective sensemaking and the dynamism between prospection and sensemaking.

To sum up, people engage in prospective sensemaking to revise the past, so as to construct a future self (Gioia *et al.,* 2002), perform better in the future (MacKay, 2009; Pratt, 2000) and to develop coping mechanisms for future unexpected issues (MacKay, 2009). Prospective sensemaking may be used to deal with unexpected issues that emerge in the future (MacKay, 2009). A few questions remain to be answered, such as how people engage and differ in prospective sensemaking, and the dynamism between prospection and sensemaking.

2.4. Employees' sensemaking about organisational change

This section focuses on literature concerning different groups' sensemaking of organisational change, such as middle managers, senior managers, and leaders. Then, the review moves onto the study of employees' sensemaking of organisational change. Studies on sensemaking have become more diverse over the last three decades, covering organisational change and sensemaking (Gioia & Chittipeddi, 1991; Thomas *et al.*, 1993; Balogun and Johnson, 2004), discourse and sensemaking (Rouleau and Balogun, 2011; Cornelissen, 2012), narrative sensemaking (Brown and Humphreys, 2003; Sonenshein, 2010; Cunliffe and Coupland, 2011), social process of sensemaking (Maitlis, 2005), and materiality and sensemaking (Whiteman and Cooper, 2011; Cornelissen *et al.*, 2014).

This section focuses on organisational change and sensemaking, and research on sensemaking and crisis might be included when necessary. The rationale is as follows. First

of all, as the seminal scholar in sensemaking, Weick's research is mainly drawn from crises, such as the Bhopal crisis (Weick, 1988), the Tenerife air disaster (Weick, 1990), and the Mann Gulch disaster (Weick, 1993). The triggers for sensemaking in crisis and organisational change are similar, namely confusing or ambiguous situations (Maitlis and Sonenshein, 2010). Moreover, compared to a crisis scenario, the interruption to on-going flow in organisational change prolongs, and therefore, may give more insights to sensemaking research.

The studies of organisational change and sensemaking mostly focused on middle managers, senior managers, and leaders (Balogun and Johnson, 2004; Maitlis and Sonenshein, 2010; Rouleau, 2005; Maitlis, 2005; Rouleau and Balogun, 2011). This section provides a brief overview of the existing research on sensemaking regarding organisational change, and points out the necessity of conducting sensemaking research on employees.

Gioia and Chittipeddi (1991) examine the role of CEO in the instigation stage of a strategic change at a public university. They find that CEO is mainly intended to make sense of the strategic change needed, and give a sense of the change to other groups of the organisation. Likewise, the role of middle managers is to make sense of the change initiative and to articulate the change (Rouleau, 2005). The early work of sensemaking and middle managers focuses on the role of middle managers in change (Balogun, 2003). Middle managers' sensemaking is crucial in implementing change by understanding this change and exerting influences over the staff (Balogun, 2003). Similarly, Rouleau (2005) launches a study to investigate middle managers' sensemaking and sensegiving of strategic change. According to her, the main roles of middle managers are to make sense of the change initiative and to use discursive abilities to influence the front line staff and outside stakeholders.

Thus, one of the two important roles performed by middle managers is to make sense of the change initiative introduced by senior managers, which puts middle managers in the role of change recipients. Middle managers as change recipients are studied extensively by Balogun and Johnson (2004; 2005). This strand of research views middle managers as change recipients, since they have no input into how the service changes, and their main role is to implement the change initiated by senior managers. The studies of Balogun (2006) and Balogun and Johnson (2004, 2005) also highlight the importance of other change recipients, i.e., employees, in the change process. For example, Balogun and Johnson (2005) call for more research on sensemaking of change recipients and different staff groups, as well as the relationship between different groups' sensemaking and the result of planned organisational interventions.

Change initiators and change recipients are two different groups, and are certain to have different understandings and attitudes towards the change (Bartunek *et al*., 2006; Balogun & Johnson, 2004; Maitlis and Sonenshein, 2010). As Sonenshein (2010) reveals, managers' sensemaking and sensegiving do not confine employees' sensemaking of an organisational change. Employees' sensemaking about change initiative is likely to diverge from those of managers, due to social interaction with other agencies in one's surroundings. Brown *et al.* (2008) also find that a distinction exists among the sensemaking of different groups in an organization, and explore the reasons why people have different interpretations of the same experience.

Furthermore, a study of employees is necessary, since they are the ones that carry out the daily activities and implement the change (George and Jones, 2001; Bartunek *et al*., 2006), and individual actors' sensemaking affects the success of intended change initiative (Lockett

et al., 2014). Nevertheless, there are only a small number of studies on the sensemaking of change recipients or employees (Balogun and Johnson, 2005; Bartunek *et al.*, 2006), and frontline employees are often overlooked in studies of organisational change and sensemaking research (Sonenshein, 2010). Previous research mainly focuses on change initiators, rather than change recipients, and the limited research on change recipients often depicts them as merely resisting, rather than taking the analysis further to questions such as how change recipients differ in making sense of common experience and how they feel about the change (Kuhn & Corman, 2003; Oreg, 2006; George & Jones, 2001; Bartunek *et al*., 2006).

Given the limited research on employees' sensemaking about organisational change, this section firstly draws on previously conducted research on managers and leaders' sensemaking about organisational change, so as to inform the study of employees' sensemaking and organisational change (Maitlis, 2005; Balogun and Johnson, 2004; 2005; Bartunek *et al*., 2006; Rerup and Feldman, 2011). Research on employees' sensemaking will also be reviewed to identify research gaps.

As one of the most important works to explore leaders' sensemaking, Maitlis (2005) answers the question of how leaders and stakeholders construct what they construct, and with what effects. She reveals four process patterns and outcomes of organisational sensemaking, these being 'guided' sensemaking, 'minimal sensemaking', 'restricted' sensemaking, and 'fragmented' sensemaking. The four patterns are grouped according to level of participation from leaders and stakeholders in activities and events planned by the organisation.

More specifically, a high level of participation from both leaders and stakeholders results in 'guided' sensemaking. On the contrary, low level of participation from both leaders and

stakeholders leads to 'minimal' sensemaking. 'Restricted' sensemaking happens when leaders are highly engaged in the activities, but stakeholders merely act as passive recipients, whereas 'fragmented' sensemaking involves active sensemaking only from stakeholders. Thus, organisational sensemaking is affected by the participation of both leaders and stakeholders in organisational activities. Given the importance of employees in implementing organisational change, it might be useful to investigate the patterns between employees' level of participation in organisational change and change outcomes. Bartunek and her colleagues (2006) made such an attempt.

As one of the few literatures on employees' sensemaking, Bartunek *et al*. (2006) use survey data to analyse the sensemaking of employees. They examine the relationship among staff participation in the change, perceived gains of the organisational change, and staff understanding of the change initiative. They identify a positive relationship between staff participation and their understanding of the change initiative. The central message Bartunek *et al*. (2006) send is that change recipients' level of participation affects their interpretation of change, which in turn influences their perceived gain or loss from the change initiative. Nevertheless, current studies have failed to reveal the underlying reasons for different levels of staff participation in a particular change and the patterns of their sensemaking outcome.

As mentioned earlier, change initiators such as senior managers and change recipients fall into two different groups, and are certain to have a different understanding and attitude towards the change (Bartunek *et al*., 2006; Balogun & Johnson, 2004; Maitlis and Sonenshein, 2010). Balogun and Johnson (2004) study the sensemaking of middle managers in an organisational change from hierarchical to flat. More specifically, they study the schemata change of middle managers as change recipients in the three newly designed

divisions across three different time points.

Balogun and Johnson (2004) find that in time 0, the schema of a common goal is present in the organisation. With organisational change, middle managers seek to register the new schema of individual division throughout time 1. However, middle managers encounter an unfamiliar environment and experience inconsistency between their old schemata and the current situation. They discover that it is difficult to relate the current happenings to their own schemata, i.e., the common goal shared within the organisation. Time 2 is characterised by friction and negotiation among middle managers regarding the schemata of their individual divisions. Surprisingly, the negotiation reaches a consensus, and leads to shared but different schemata regarding each division's work process and responsibilities, and a new schema of interdivisional cooperation is developed in time 3.

Balogun and Johnson (2004) detailed how middle managers make sense of organisational change and the changes in their schemata across the three time points. As discussed earlier, different groups might have a distinct understanding of a common experience (Bartunek *et al*., 2006; Brown *et al.,* 2008). Thus, it might be worthwhile studying the way in which staff make sense of organisational change across the three divisions, and investigate the differences in staff sensemaking of common experience.

The study carried out by Balogun and Johnson (2004) outlines the dynamism between schema and sensemaking during organisational change. The studies have two implications for the current research. First, studies at different time points are essential to catch the dynamic pattern of prospection in the sensemaking process. Second, the study of middle managers' sensemaking, especially the different sensemaking outcomes of middle managers facing the

same event, prompts further research on the sensemaking of employees from different groups.

The work by Sonenshein (2010) examines patterns of sensemaking outcome to some extent. He finds that employees exhibit three patterns of responses towards organisational change, these being, resisting, championing, and accepting the change. Research conducted by Sonenshein (2010) focuses on two variables, namely the time employees engage in the change and the context of their individual store. Sonenshein (2010) goes beyond the normal positive-negative division in studying employees' responses to change, and adds a significant-insignificant dimension to the study. According to him, the significant-insignificant dimension explains the reasons for employees' negative attitude towards the change. However, his work is not primarily based on employees' sensemaking about organisational change, and thus does not explore other aspects of sensemaking such as employees' prospection in sensemaking in detail.

2.5. Summary

To sum up, this chapter firstly discusses the definition of sensemaking. Then, the current literature on prospective sensemaking is presented, raising the need for further investigation into the prospective dimension of sensemaking. More specifically, the contradictory views revolve around the presence of prospection in sensemaking and the role of prospection in the sensemaking process (Weick, 1995; Gioia and Thomas, 1996; Stigliani and Ravasi, 2012).

Moreover, this chapter reviews the existing work on sensemaking and organisational change. The literature research shows a scarcity of studies on how employees make sense of organisational change. Employees are essential for the success of an intended change

initiative, and researchers have called for more studies on employees involved in a change (George and Jones, 2001; Bartunek *et al.*, 2006; Lockett *et al.*, 2014).

As mentioned earlier, building on the framework of the sensemaking process proposed by Weick *et al.* (2005), this study examines work role identity and prospection in sensemaking focusing on employees, which were not extensively studied in Weick's work. The next chapter offers a thorough literature review on work role identity and sensemaking.

Chapter 3 Work role identity and emotion in sensemaking

3.1. Introduction

The previous chapter reviewed prospection in sensemaking, with a special focus on employees' sensemaking about organisational change. This chapter firstly looks at another important element---identity---in sensemaking, leading to the discussion of the less explored lower level identities, i.e., professional identity and work role identity (Ashforth *et al*., 2008). Following this, work role identity and the sensemaking of organisational change is discussed with regard to existing research on identity and sensemaking, professional identity and sensemaking.

Then, the chapter moves on to discuss emotion in sensemaking. Although emotion is induced in this study, to lay a foundation for later data analysis and to situate the current study, a brief review of emotion and sensemaking is provided. In doing so, the definition of emotion and my approach to study emotion are firstly discussed. Following this, the literature on emotion and sensemaking is reviewed. The final section of the chapter summarises the two literature review chapters, and proposes research questions.

3.2. Identity and sensemaking

Weick provides a general relationship between identity and sensemaking (Weick, 1995; Weick *et al*., 2005). They argue that one's identity changes in the presence of different social agents, since self-perceived identity changes with the subject of interaction. This, in turn, affects one's sensemaking of current happenings. Sensemaking involves the search for a

continued self in the turbulent environment, via identity construction and re-construction (Brown *et al*., 2008).

The interrelationship between identity and sensemaking implies an individual sensemaking process grounded in identity (Weick, 1995). Studying sensemaking from an individual level can help to explain how people reach a consensus on the same issue from a point of disagreement, and their subsequent organised activities. Most of the extant research focuses on how sensemaking facilitates identity construction and reconstruction (Sandberg and Tsoukas, 2015). For example, Helms-Mills (2003) finds that CEO Louis's sensemaking of the change program impacts on his own identity. Louis's plan of cultural change convinces him that he represents "the cutting edge of the latest management trends" (Helms-Mills, 2003: 130). Nevertheless, as Sandberg and Tsoukas (2015) assert, limited research has been conducted to explore how identity impacts on sensemaking (there are a few exceptions such as Sutcliffe and Weick, 2003; Korica and Molloy, 2010). This research focuses on the other side of the coin, but with a focus on work role identity rather than identity.

Sutcliffe and Weick (2003) discover that a surgeon's self-perceived identity as someone learning and practicing complex surgical procedures rather than saving life affects their attitudes and behaviors towards treating the patients, partly resulted in the tragedy of a higher mortality rate in the case of the Bristol Royal Infirmary. Korica and Molloy (2010) find that medical professional identities are adjusted during the development and adoption of new technologies. The professional identity reconstruction process comes along with technology introduction, stabilisation, and adoption. According to them, both professional identity construction and the adoption of technology are social processes.

Despite the fruitful study of identity and sensemaking, researchers find that people tend to identify more with lower level identity than with higher level identity such as organisational identity (Bartels *et al.*, 2006; Johnson *et al.*, 2006; Ullrich *et al.*, 2007). Higher-level identities become less central to one's identity, given the less tight relationship between employees and their organisations, might push lower level identity such as professional identity and work role identity to the core of one's identity (Ashforth *et al.*, 2008: 352-353).

3.3. Work role identity and professional identity

This section firstly discusses and compares the two lower level identities, professional identity and work role identity. Following this, the sensemaking of different staff groups, both professional and non-professional, are presented. Finally, the rationale to study work role identity is provided.

3.3.1. Work role identity and professional identity

Professional identity is based on a system of knowledge, and legitimised by cultural and social values (Abbott, 1988). The system of knowledge could be gained through a qualification from university or professional training and socialisation in the field, and further enhanced through career development (Currie *et al.*, 2010). According to Abbott (1988: 58), knowledge developed through a professional qualification is cognitive, and therefore, other means such as cultural and social values of a profession are needed to legitimise a particular professional identity.

The system of knowledge developed from professional education, training, and practice forms a boundary, recognised by the jurisdiction of the profession. Nevertheless, the jurisdiction of a particular profession is not only defined by the content of the profession, but

also the context of the profession, that is, the profession's social and cultural associations (Abbott, 1988). The cultural value of a profession is reflected on the synchronisation between fundamental values of society and those of the profession. Social value is realised through the interaction of professionals with other agencies, such as the state or other professionals in the workplace (Abbott, 1988).

The interrelations among professionals reaffirm the boundary of a profession and legitimize its existence, such as the relationship between primary and subordinate actors in an organization. The mutual acceptance of respective professional boundaries by primary and subordinate actors ensures clear jurisdiction of each profession (Fournier, 2001). Professions are interdependent, and a change in one profession affects other interrelated professions (Nancarrow and Borthwick 2005; Abbott, 1988). The professional body and the state impose professional boundaries through formal education, training, and career development structure. Thus, professional identity is based on a system of knowledge, influenced by the interrelations among professions, and affected by the professional body to which professionals belong and the state (Abbott, 1988; Currie *et al*., 2010).

As with professional identity, work role identity can be described as comprising two components, i.e., work content and context (Ashforth, 2001; Ramarajan, 2014). Identity content and context are the two aspects that are mostly examined in the general identity literature (Ramarajan, 2014). Work role identity is socially constructed by members of an organisation through interaction with people from other groups (Ashforth, 2001; Ravasi and Schultz, 2006). In other words, role identity is partly formed when carrying out daily activities associated with the role, and partly shaped by the social environment one is in. Work role identity is socially constructed and influenced by people around one's work role,

i.e., one's role set (Ashforth, 2001).

With due respect to the role identity definition given by Ashforth (2001: 6), "the goals, values, beliefs, norms, interaction styles, and time horizons that are typically associated with a role", work role identity is defined as comprising of the values and beliefs one holds and the social interactions involved in carrying out a work role. For simplicity, work role identity and role identity is used interchangeably in this thesis. As Ibarra (2007) contends, only by practising activities can individuals know what their values and beliefs are. By taking on activities that are enclosed in a role, people may identify with the attributes that enhance the values of their core self, and thus, identify or dis-identify with a particular role. Therefore, the activities entailed in the role define the content of role identity and the role boundary.

Role identity concerns the self-definitions and values of individuals, which can be either peripheral or central to the person in question (Ashforth, 2001). As mentioned earlier, the content of work role identity is based on the activities entailed in the role, rather than on a system of knowledge that is distinct in professional identity (Abbott, 1988; Ashforth, 2001). The system of knowledge in professional identity is supported by the professional body and the state, whereas the activities pertaining to a role are subject to each organisation.

The context of role identity is reflected in the relational characteristics of role identity. Similar to identity, which is a socially constructed notion, influenced by interactions with others (Gioia *et al.*, 2000), role identity is "a socially constructed definition of self-in-role" (Ashforth, 2001: 6). The salience of a particular identity is affected by one's context and the surrounding environment (Ashforth *et al.*, 2008). Individuals are proactive agents in identity construction, and influence how the new role identity is constructed, together with the

environment and their social relations (Gioia *et al*., 2000). Likewise, role is regarded as something negotiated and constructed between people and the environment, and role identity is affected by social factors (Ashforth, 2001). Thus, the interaction within the organisation becomes the interaction between different roles, and changes in one particular role affect other roles within the organisation.

Therefore, the main difference between professional identity and work role identity is that the social values of professional identity are largely determined by a professional body and the state, whereas the social values of work role identity rely more on interrelations and interactions between different groups in the organisation, due to the absence of governance from a professional body and the state (Ashforth, 2001; Ashforth *et al*., 2008; Abbott, 1988; Currie *et al*., 2010).

As one of the earliest works on identity, Albert and Whetten (1985) contend that identity is fixed and unmalleable. However, later on, scholars find identity is changeable and adjustable (Gioia and Thomas, 1996; Gioia *et al*., 2000). Gioia and Thomas (1996) assert that by projecting a future desirable identity, organisation members will be inspired to reach the proposed identity, and seek to align their identity with the identity provided. Professional identity construction is a malleable and social process (Korica and Molloy, 2010; Fitzgerald and Ferlie, 2000).

Likewise, the two above-mentioned components of work role identity show that work role identity is dynamic and malleable. Changes in one of the two components of work role identity might affect one's work role identity. A role identity alters with changes in the activities entailed in a role. As Ashforth (2001: 1-2) argues, role "can be learned and enacted

by a range of individuals" and role occupants are "to some extent substitutable and perhaps even interchangeable", since the scope and activities of a role is permeable and flexible to some extent. Also, changes in the social contact of a role might affect one's perception of the role and their role identity.

3.3.2. Professional and non-professional group

As discussed earlier, the previous literature has emphasised the relative stability of professionals, their autonomy in carrying out activities, and their control over certain professional knowledge (Currie *et al.*, 2010). Professional groups are known for their specialism over a subject area and tacit knowledge gained through training and practicing, which create a barrier for protecting their professional domains (Abbott 1988; Waring and Currie, 2009). Thus, professions tend to defend their jurisdiction and autonomy over their professional roles in a changing situation (Martin *et al.*, 2009).

In contrast, less powerful professional groups are more likely to see change as an opportunity to advance their valued activities in a role (Currie and White, 2012). Martin *et al.* (2009) study GPSIs and geneticists, and find that the less powerful professional GPSIs see their new role as an opportunity to practice in a field that they aspire to be, whereas a higher level professional group of Geneticists protect their territory by claiming autonomy over the tacit knowledge of the role.

Lockett *et al*. (2014) also find that actors' inter-professional and intra-professional interactions affect the diffusion of their sensemaking outcome of the change initiatives and the success of the intended change. Thus, based on the existing literature (Martin *et al.*, 2009; Currie and White, 2012), one might expect that there to be a homogeneity within a group and

heterogeneity across groups. That is, employees from the same staff group make sense of common experience in the same way, whereas people from different groups make sense of the common experience differently. Furthermore, people from the professionalised group are more inclined to reject a change that might affect their professional roles, whereas people from the non-professionalised group are more likely to accept the change initiative.

3.3.3. Rationale to study work role identity

Work role identity focuses more on the role one takes, and professional identity is restricted to certain professions (Ashforth *et al.*, 2008). Thus, the study of professional identity and sensemaking might exclude other staff groups going through the same change, given the presence of both professional and non-professional workers in organisations. One of the research gaps identified is the sensemaking of different groups regarding common experience (Balogun and Johnson, 2005; Bartunek *et al.*, 2006; Brown *et al.*, 2008; Sonenshein, 2010). To examine the work role identities of different groups and their sensemaking about the organisational change offers an ideal context to compare the sensemaking of professional and non-professional groups.

Moreover, as discussed in previous section, work role identity is affected more by the interrelations among groups compared to professional identity (which might be more reliant on a professional body and the state) (Abbott, 1988; Ashforth, 2001; Currie *et al.*, 2010). Therefore, work role identity offers a rich context in which to study the social element of sensemaking.

In addition, organisational behaviour research has left out of research on occupation, which is central to one's identity at work (Ashforth *et al.*, 2008). Maitlis and Christianson (2014) also

claim that there is a need to conduct more research on the sensemaking process of people experiencing identity change, especially around the workplace. They find that previous research mainly focuses on the sensemaking of individuals who go through major changes, such as trauma and loss in their personal lives (Maitlis, 2009; Wainwright and Turner, 2004, 2006).

3.4. Work role identity and sensemaking

This section firstly offers a brief overview of the existing literature on professional identity and sensemaking, so as to inform the study of work role identity and sensemaking. Following this, the extant research carried out on role identity is reviewed. Then, the section moves on to examine the varying identity work that people engage in while making sense of a change.

3.4.1. Professional identity and sensemaking

Due to the paucity of literature on the study of role identity, the literature on professional identity and sensemaking will be reviewed first (Maitlis, 2009; Pratt *et al*., 2006; Wainwright and Turner, 2004; 2006). The discussion about the literature on relatively well established professional identity informs the definition of work role identity, and lays a foundation for the later comparative study between professional and non-professional groups.

Maitlis (2009) studies the sensemaking of musicians and how they view their professional identities after injuries that prevent them from performing their roles. Playing an instrument, the main activity involved in a musician's role, is a system knowledge that musicians gain through professional education, training, and practice. Not being able to perform and carry out their daily activities not only makes musicians question the values and beliefs they hold as a musician, but also affects their interactions with other colleagues, and therefore affects how they make sense of their professional identity.

Similarly, Wainwright and Turner (2004, 2006) examine the sensemaking of ballet dancers after ageing and injury. Ageing and injury prevent ballet dancers from performing their daily activities, and thus, their values, beliefs and confidence as a dancer are undermined. They also find that major injury and aging can also trigger one's sensemaking of their role as a dancer, and impact on one's future career choice. However, studies by Maitlis (2009) and Wainwright and Turner (2004, 2006) mainly focus on the linear relationship between professional identity and sensemaking. It might be interesting to see the interrelationship between changing professional identity and people's sensemaking during this process.

Pratt and his colleagues (2006) achieve this aim to some extent, but with more emphasis on changing professional identity. Medical residents in the study carried out by Pratt *et al*. (2006) experienced a gradual change in professional identity. Pratt *et al*. (2006) study the identity construction of medical residents with six year longitudinal research. They find that medical residents' sensemaking is prompted by the divergence between their perceived new role of physician and the actual activities entailed in their daily job. According to Pratt *et al*. (2006), people normally compare what they do in their actual job to the activities associated with a particular profession, which is intertwined with the sensemaking process.

Pratt *et al*. (2006) also predict that people experiencing little discrepancy in identity change are more likely to embrace the change. They suggest further research on the relationship among an individual's role, one's identity change, and the outcome of change. The study carried out by Pratt and his colleagues' (2006) is based on one professional group, whereas a study that compares different groups in the same organisation might give rise to valuable findings.

3.4.2. Work role identity in organisational change

Role identity has been extensively studied by Ashforth (2001). He examines the individual's role transition by focusing on macro role transition, the "infrequent and more or less permanent changes within the social domain of work organizations" (Ashforth, 2001: 7). Similarly, Nicholson studies the work role transition, which is referred to as "any change in employment status (e.g., unemployment, retirement, and reemployment) and any major change in job content including intra- and inter-organisational mobility" (Nicholson, 1984: 173). Existing literature also covers how managers make sense of exiting their roles at the end of their career (Vough *et al.*, 2015). In addition, Ashforth and his colleagues (2000) carry out a detailed examination of micro role transition, i.e., the "frequent and recurring movement both within and between social domains". The most frequently cited and studied example of a micro role transition is the role transition between work and family.

Despite the above, the focus of this study is on the dynamism between work role identity and sensemaking, rather than on the macro or micro role transition studied by Ashforth (2001), Nicholson (1984), and Ashforth *et al.* (2000). However, the theories developed on role transition, in particular macro role transition, may be utilised to inform the study of work role identity in making sense of organisational change. This section examines work role identity in sensemaking regarding organisational change, drawing from relevant research on identity.

Organisational change might lead to work role identity change, which involves the process of moving away from original role identity to identifying with the proposed role identity. In organisational change identification process is a reflection of the sensemaking process (Pratt, 2000), and filled with questions about one's past, present, and future identity. In reviewing the existing literatures on identification in organisations, Ashforth and his colleagues (2008)

find that the identification process is accomplished by individual identity enactment, and is assisted by social factors such as sensegiving from leaders.

Hence, work role identity enactment and social factors such as different initiatives taken by the management team are essential for sensemaking about organisational change. An individual's role identity enactment enables them to have a clear idea of what they value in a role under a given context, and helps them to construct a role identity that confirms their values (Ashforth *et al*., 2008). As Weick (1995: 23) argues, "people learn their identities by projecting them into an environment and observing the consequences".

Role identity enactment is a process of seeking attributes that one values in the new role, while comparing to one's original role identity. As Ashforth *et al*. (2008) point out, organisation members identify with the organisation by assimilating certain aspects of organisational change into their identities. In other words, individuals seek to align their sense of self with the identities that are associated with the organisational change. An individual's desire for consistency (Ashforth, 2001) is challenged in organisational change, which is likely to bring changes to certain aspects of a person's identity.

Thus, the identification process of work role identity involves the identification of core values and attributes, through role enactment. Previous research has explored different ways to change the content of one's particular identity. For example, Ashforth and his colleagues (2008) find that the more abstract the title of a role, the less likely one is to be affected by changes to the role, since people are given enough space to form their preferred role identity. Second, the meaning of a particular role could be modified to assist the role change. For example, a role could be described as having the characteristics of learning and encouraging

people to learn more skills, rather than focusing on the actual novel skills required by the new role (Ashforth, 2007).

Moreover, as discussed earlier, role identity relies more on the associated groups of the role for role boundary and jurisdiction, compared to professional identity. The social element of role identity is affected by leaders' sensegiving and social interaction with other interrelated groups in the organisation (Ashforth *et al*., 2008). Thus, the identification process of work role identity also involves social interaction with one's role set.

The negotiation between one's work role identity and the changes to the role brought by the organisational change over time appear to show the characteristics of a 'punctuated equilibrium model' (Gersick, 1991; Ashforth, 2001). That is, a temporary interpretation and agreement regarding one's role identity might develop from interaction among individuals and the projected role identity from the organisation. The temporary agreement offers individuals the opportunity to internalise the content of a role by practicing and training and the context of the role, such as other staff groups within one's role set.

Thus, a new role identity with different role content and context forms under the temporary agreement. Given the temporality of the agreement, the role identity formed is transitional and provisional. Temporary and provisional identity is also mentioned by Ibarra (1999), who reveals that people tend to adopt a 'provisional selves' when socialising in a new working environment. As Ashforth (2001) argues, people need a transition bridge to move from one role to another.

Similarly, Clark *et al*. (2010) examine transitional identity in a merger context, finding that

transitional organisational identity serves as an intermediary that enables successful organisational change to take place. They claim that the main reasons are that firstly, transitional identity allows the two companies to have a certain level of freedom to identify with the proposed new organisational identity. Transitional identity also sets certain boundaries, so that organisational members are not exposed to identity ambiguity. A blurring of role boundaries might create an ambiguous identity, and lead an organisation's members to search for meanings so as to stabilise their organisational identities (Corley and Gioia, 2004). It is an essential need of human beings to be able to identify oneself in the social world and avoid identity ambiguity (Weick *et al.*, 2005).

To sum up, this section shows that in organisational change work role identity might go through changes either in role content or context, and involve provisional work role identity. It also discusses different ways of changing role content to accommodate the organisational change. Nevertheless, questions such as how changes in work role content and context affect employees' sensemaking remain to be answered. Also, research that differentiates the dynamics between the social element of a work role identity and different forms of sensemaking is needed. The following section reviews existing research on the identity work involved in senemaking, so as to inform the study on work role identity and sensemaking.

3.4.3. Identity work and sensemaking

Scholars have examined the varying identity work that people engage in while making sense of a change (Petriglieri, 2011; Vough *et al*., 2015). For example, Petriglieri (2011) specifically focuses on the identity work that people engage in while confronting identity threat, and identifies two responses to identity threat, i.e., identity protection and identity restructuring. She also shows the dynamics between identity threat and different outcomes of in making

sense of the identity threat, and points out two outcomes following the identity change, namely maintaining the threat and eliminating the threat.

According to Petriglieri (2011: 647), there are three types of identity protection, including 'derogation', 'concealment', and 'positive-distinctive'. Derogation means condemning the sources where identity threat originates. Derogation can reduce the level of the threat rather than stopping the threat from happening. On the contrary, concealment might reduce the likelihood of possible identity threat happening. Positive-distinctiveness refers to individuals emphasizing and cherishing certain aspects of an identity, so as to protect the identity from potential harm.

An identity restructuring response includes three sub-categories as well, these being changing one's attached importance to the identity, assigning new meanings to the identity, and exiting the role (Petriglieri, 2011: 648). Reducing the importance of a particular identity could help individuals move certain values and attributes they once place at the core of their identity to a periphery position. Therefore, the harm to the identity is subsequently reduced.

The second sub-category is assigning new meanings to a particular identity, so that certain elements that might bring threat to the identity may be absorbed to the new definition given to the identity (Pratt *et al.*, 2006). As mentioned earlier, Ashforth *et al.* (2008) also argue that the boundary of an identity could be expanded to incorporate new attributes to the particular identity. Finally, identity exit means that people leave their particular role and abandon the identity associated with the roles or groups.

Drawing on Petriglieri (2011), Vough and her colleagues (2015) detail the identity work

managers adopted in making sense of ending their career, and find four main types of identity work that managers engage in, namely identity enhancing, identity maintaining, and identity protecting, and identity restructuring. Managers exit their roles when they either encounter identity opportunities such as enhanced and maintained identity, or an identity threat, where they have to protect or reconstruct their identities.

Identity maintaining happens when managers follow their predetermined retirement age and exit the organisation. Identity enhancing happens when managers successfully finish one large project near the end of their career. Managers engaging in an identity protecting category end their career when there is a good retirement package which reflects their self-perceived values, or when the organisation does not value them as much as used to be. Identity restructuring occurs when managers experience disagreement between one's values and those of the organisations, or when managers attach more meanings to other things compared to work (Vough *et al*., 2015).

Vough *et al*. (2015) show different types of identity work involved in managers' sensemaking of exiting their roles at the end of a career. Their study may be utilised to study the changes in work role identities and their impact on one's sensemaking of the same change initiative. Moreover, the dynamics between various types of identity work and different forms of sensemaking could be investigated, so as to show their inter-relationship and how people vary in making sense of the same change initiative.

To sum up, this section reviews the literature about role identity, professional identity and sensemaking. The study of role identity is important for the following reasons. First, role identity provides a meaning for social agents' daily activities and interactions, since role

identity situates one in a larger social context, and encourages one to "think, act, and even feel as he or she imagines a prototypical or exemplary member would" (Ashforth, 2001: 65). Second, as pointed out earlier, as a lower level identity, the study of role identity might prove useful, since occupation is the "major identity badge for situating individuals in the organization" (Ashforth *et al*., 2008: 354). Lastly, to study role identity in a multi-agency organisation might provide insights into different staff groups' sensemaking about organisational change.

Nevertheless, while conducting the fieldwork, I noticed that employees revealed emotions towards certain aspects of their old and new roles, as shown in the findings section. Thus, emotion in sensemaking, induced from the data in this study, is analysed and theorized to enrich the sensemaking process. The following section reviews literature on emotion in sensemaking, so as to lay a foundation for later discussion.

3.5. Emotion and sensemaking

3.5.1. Emotion

The definition of emotion has been very much debated since its appearance in social science research (Ashforth and Humphrey, 1995; Scherer, 2000; Scherer, 2005; Ashkanasy and Ashton-James, 2005; Grandey, 2008). This section seeks to provide the emotion definition adopted in this study. Following this, the aspects of emotion this study focuses on are discussed, and the rationale for doing so is provided.

Following Fineman (2003) and Scherer (2005), affect and mood are excluded from the discussion of emotion in this study. Affect is defined as a general term for emotion, feelings, and mood (Fineman, 2003; Ashkanasy and Ashton-James, 2005; Briner and Kiefer, 2005).

Mood is a lingering feeling, and its causes are often ambiguous and difficult to identify (Fineman, 2003), whereas emotion is a short-lived feeling and event focused (Scherer, 2005; Weiss and Beal, 2005; Grandey, 2008). Therefore, this study adopts the emotion definition of "a transient feeling state and a response to an identified cause or target" (Grandey, 2008: 237; Catino and Patriotta, 2013: 440).

Emotion encompasses different aspects (Averill, 1980; Frijda, 1986; Scherer, 2005) such as physiological arousals (Cunliffe and Coupland, 2011), motion expressions (Scherer, 2005), and displayed emotions (Liu and Maitlis, 2014) and experienced emotions. The focus of the current research is the relationship between emotion and sensemaking, rather than the physical arousal or associated motion expression or the display of any specific emotion. Moreover, as I will explain further later on, physiological arousals, motion expressions and displayed emotions are best to be observed by ethnography and video recording (Cunliffe and Coupland, 2011; Liu and Maitlis, 2014), which are not the methods adopted in this study. Therefore, given the induced nature of emotion in this study, I only examine experienced emotion, which is assessed with regard to their activation or intensity, and their level of pleasantness or valence (Bartunek *et al*., 2006; Elfenbein, 2007; Walsh and Bartunek, 2011; Maitlis *et al*., 2013).

Emotions with distinctive valences and intensities might be elicited during a particular experience (Huy, 2002; Salvatore and Venuleo, 2008). Emotional valence refers to "the emotional evaluation ("positive" or "negative") of particular events, objects, or situations" (Catino and Patriotta, 2013: 441). Both positively and negatively valenced emotions with different levels of intensity play a crucial role in concluding different sensemaking results (Myers, 2007; Walsh and Bartunek, 2011; Maitlis *et al*., 2013).

3.5.2. Emotion and sensemaking

Emotion has been proved to have an effect on human thinking and behaviour (Huy, 2012), and shapes individual's meaning construction (Fineman, 2003). Emotion in sensemaking has gained increasing interest from scholars in the past decade (Huy, 2002; Bartunek *et al.*, 2006; Myers, 2007; Rafaefi *et al.,* 2009; Maitlis & Sonenshein, 2010; Bartunek *et al*., 2011; Walsh and Bartunek, 2011; Maitlis *et al*., 2013; Cornelissen *et al.*, 2014). As Myers (2007) and Weick (2010) argue, earlier exemplary works on sensemaking such as the analysis of Bhopal should incorporate the study of emotion.

According to Weick *et al.* (2005), with ecological change, the on-going flow of an organisation is interrupted. To recommence the activities, either negative or positive emotions will be elicited, depending on the success of the resumption. These emotions will then be taken into the sensemaking process. However, Maitlis *et al*. (2013) criticise the simple linear relationship between emotion and sensemaking proposed by Weick *et al*. (2005), and carry out a systematic study of emotion with regard to the three stages of the sensemaking process, i.e., noticing, selection, and retention. In line with the extant literature on emotion and sensemaking, the following literature review is organised around the role of emotions in the three stages of the sensemaking process (Maitlis *et al*., 2013).

Maitlis *et al*. (2013) argue that emotions, especially moderate negatively valenced emotions, provide the energy to ignite the sensemaking process. Consistent to Maitlis *et al*. (2013), Rafaefi *et al*. (2009) find that negatively valenced emotions such as anger and anxiety are more likely to instigate sensemaking. Ashkanasy *et al.* (2002) also argue that people experiencing negatively valenced emotions tend to involve in active sensemaking activities hoping to make these negatively valenced emotions diminished.

Their argument is further elaborated by Walsh and Bartunek (2011), who examine the relationship among emotion, behaviour, and cognition in the process of setting up a new organisation. They assert that emotion energises the sensemaking process and signals the action tendency. Specifically, negatively valenced emotions such as anger are crucial to provide energy to initiate the sensemaking process so that the current situation can be changed (Carver and Harmon-Jones, 2009; Walsh and Bartunek, 2011), whereas positively valenced emotions are to sustain people's effort in achieving the final formation of the organisational.

On the contrary, Cornelissen *et al.* (2014) assert that emotions such as fear and panic can impede actors' ability in making sense of others' behaviours and eliminate alternative explanations. Maitlis and Sonenshein (2010) examine the role of negative emotions such as anger and fear in the sensemaking of crisis and change. They find that intense negatively valenced emotions can hinder the sensemaking process.

Interestingly, Bartunek *et al*. (2006) contend that the arousal of both pleasant and unpleasant emotion in change shows that certain actions should be taken to intervene the process, so as to maintain a successful change initiative. In other words, both positively and negatively valenced emotions can elicit the sensemaking process and affect people's behaviour.

Therefore, given the contradicted conclusions from existing literatures, a study into the dynamics between emotions and the triggering of the sensemaking process is much needed. Questions such as how emotions with different valence affect whether the sensemaking is triggered could be asked.

With ecological change people might notice different anomalies, which might be accompanied by distinctive emotions. Certain anomalies are chosen as sensemaking cues while others are deselected. There are increased attentions devoted to how and why certain cues are selected and deselected for sensemaking (Rafaefi *et al.,* 2009; Maitlis *et al*., 2013).

Maitlis *et al*. (2013) conclude that the 'generative' sensemaking process is associated with positively valenced emotions, whereas an 'integrative' sensemaking process tends to be related to negatively valenced emotion. That is, people experiencing positively valenced emotions are more inclusive in drawing from the cues in the environment; meanwhile, people experiencing negatively valenced emotions are more exclusive and focused on the immediate cues in the environment.

Similarly, Maitlis and Sonenshein (2010) find that people experiencing anger and fear tend to make sense of the happenings in "systematic but less expansive" way. They also contend that positively valenced emotions enable people to notice alternative approaches. However, they also find that intense positively valenced emotions in change and crisis might induce overly positive sensemaking result and lead to catastrophe.

This is partially supported by Rafaefi *et al.* (2009), who claim that positively valenced emotions make the sensemaking of the current situation static, and allow people to be open to alternative approaches. Thus, positively valenced emotions normally lead to positive sensemaking results, since people are more open to alternative methods in dealing with the problem and subsequently are more active in striving for the success of the initiative.

Studies show that people in a positive emotional state tend to avoid taking cues that might

cause negatively valenced emotions into the sensemaking process (Ashkanasy *et al.,* 2002). Similarly, Bartunek *et al*. (2011) assert that people tend to "selectively accept information that is congruent with the current emotional state". Therefore, people tend to homogenise and generalise an experience despite different emotions elicited in the phenomenon.

To conclude, scholars hold different views of the selection of certain emotions as sensemaking cues. The main difference is that whether negatively and positively valenced emotions differ in being selected for the sensemaking process. Thus, a holistic study is needed to ascertain the relationship between the valence and intensity of the emotions and the cues selected in the sensemaking process.

In addition, as mentioned earlier, most literatures on emotion and sensmaking focused on moderate and intense emotions (Rafaefi *et al.,* 2009; Walsh and Bartunek, 2011; Maitlis *et al*., 2013), few literatures have examined mild emotions in sensemaking (Maitlis and Sonenshein, 2010; Maitlis *et al*., 2013). Existing literature argues that mild emotions are not easy to be noticed, let alone taken as cues for sensemaking (Maitlis and Sonenshein, 2010). Nevertheless, the dynamic between mild emotions and one's sensemaking pattern might be enlightening for sensemaking research.

3.5.3. Emotion and work role identity

As pointed out earlier, events are the main cause of emotions (Scherer, 2005; Weiss and Beal, 2005; Grandey, 2008). Kiefer (2005) studied the daily emotional experiences of staff in organisational change, and found that perceptions of 'an insecure future' and 'inadequate treatment by the organization' can arouse negative staff emotions. Thus, organisational change can generate emotions among staff (Huy, 2002; Kiefer, 2005).

Scholars have explored why events are the proximal causes of emotion, and argue that emotions are aroused only about issues people consider relevant and important to them (Stryker, 2004; Kiefer, 2005; Huy, 2011; Cascon-Pereira and Hallier, 2012). Emotions are resulted from the interaction between one's identity and the events arising from the change, which reflects the Affective Events Theory (AET) (Weiss and Cropanzano, 1996; Weiss and Beal, 2005; Grandey, 2008). The AET suggests that certain affective events could trigger emotion, which in turn can lead to certain behaviors. Events that can make people's identities salient are important to their values and self-definition, and therefore, can invoke strong emotions (Kreiner *et al*., 2006).

Moreover, Kiefer and Mueller (2007) analyse how emotions are connected to identity work in the context of organisational change. They examine four dimensions of identity including acknowledgement of one's role set, coherence and authenticity of realising one's personal values at work, and autonomy and control of work, which in essence, are associated with one's work role identity.

Likewise, Cascón-Pereira and Hallier (2012) study the role of emotion in individual professional identity construction through the lens of social identity. The discrepancy between the subjects' doctor identity and doctor manager identity resulted in negative feelings such as anxiety and sadness. They also find that identity and emotion are positively related, i.e., the significance of a particular identity to an individual influences the intensity of the emotion provoked. Therefore, a possible relationship exists between emotion and work role identity, and emotions may be triggered by comparing the affective aspects of the event against the norms and attributes that individual values in one's work roles.

3.6. Summary and research questions

To sum up, this chapter reviews the literature regarding professional identity, work role identity and sensemaking. The review reveals that the study of the relationship between work role identity and sensemaking serves the purpose of carrying out research on employees' sensemaking. The chapter also draws a distinction between professionalised and non-professionalised groups. A study comparing these different groups within an organisation might offer more insights into sensemaking across different staff groups.

Although emotion is induced from the data, to lay a foundation for the later analysis of emotion in sensemaking, this chapter also discusses emotion and reviews literature on the role of emotion in the three stages of sensemaking. The possible relationship between emotion and identity is also presented.

Informed by the gaps in current literature as discussed in Chapters 2 and 3, this thesis focuses on how and why employees differ in their sensemaking about a common experience. More specifically, the current study examines the following two questions: 1) How and why do employees engage in prospective sensemaking? 2) How does work role identity affect sensemaking?

The next chapter outlines the empirical context of this research, a multi-skilling project. The multi-skilling project involves changes to people's role at work, and therefore, provides a rich context to study work role identity and sensemaking. It also details the rationale to choose the multi-skilling project as the empirical context, and discusses the methodology, research methods, and analytical approach of this study.

Chapter 4 Research Design

4.1. Introduction

This chapter presents the empirical context of this research, and outlines the way in which data collection and data analysis were carried out, as well as the rationales for the decisions made. Firstly, the rationale for choosing qualitative research and a case study approach is provided. Following this, the empirical context of the study is provided. Then, the discussion moves on to the three research methods used, i.e., semi-structured interview, observation, and documentary analysis. Finally, my approach to data analysis is presented, followed by an example of how I actually operate the principles of coding.

Before moving on to the core of the chapter, a brief discussion of my viewpoint towards knowledge is presented. Given that the way in which the researcher sees knowledge and the world determines what phenomenon is observed and how it is interpreted (Corbin and Strauss, 2008), readers need to understand the ontological and epistemological viewpoint of the author. I adopt a social constructionist approach in this study to fit with the research methodology and Weick's *et al*. (2005) sensemaking framework, upon which this study is based.

A social constructionist approach emphasises the relativity of reality and knowledge; i.e. reality and knowledge are socially constructed (Burr, 2003). According to social constructionism, there is no objective fact, and reality is dependent on the way in which individuals perceive the world (Burr, 2003). Thus, knowledge and reality are created to fulfil certain purposes, and are sustained through social practices (Berger and Luckmann, 1991).

From the perspective of social constructionists, social science research is more closely associated with social interaction: that is, how reality is created through interaction among people, rather than the nature of people or society (Berger and Luckmann, 1991; Burr, 2003). Thus, social constructionism provides a more appropriate means to explain the phenomena in question: people's experience and understanding of the multi-skilling Project, changes in their work role identity and their sensemaking about the Project as they interact with others. Moreover, given that the sensemaking process is prospective and could produce different versions of past and future (MacKay, 2009), social constructionist approach is most suitable to examine prospective sensemaking.

4.2. Qualitative research

The extensive literature review provided in Chapters 2 and 3 has enabled two main research questions to be identified, which can fill the gaps in current research in the area. 1) How and why do employees engage in prospective sensemaking? 2) How does work role identity affect sensemaking?

This study seeks to investigate the above-mentioned questions by employing qualitative research. Qualitative research is most useful to study phenomenon that are often not observable on the surface (McNulty and Ferlie, 2002). The way in which people make sense of an organisational change is imperceptible on the surface, but exists and is formed gradually in one's daily life. Also, qualitative research is most appropriate to study the everyday behaviour of those that are being researched (Silverman, 2000).

Moreover, qualitative research is most suited to providing a detailed understanding of the issues concerned (Creswell, 2007). Only through detailed analysis of the organisational

change, can the mechanism of prospection and work role identity in sensemaking be revealed. Qualitative research focuses on "the interpretive understanding of human experience" (Denzin and Lincoln, 2008: 10), which could uncover the informants' sensemaking of a particular event and their views of the event.

In addition, qualitative research is best suited to study how and why different groups differ in making sense of a common experience, since a qualitative case study is characterized by multiple realities (Stake, 1995: 43), and is most effective in investigating how and why people develop their assumptions about particular issues (Denzin and Lincoln, 2008).

Qualitative research may be seen both as an art and a science (Patton, 2002). As an art, this type of research reflects the researcher's ability to put together a plausible story, which can serve to explain the complexity of the issues in the field. Also, sensemaking is about plausibility rather than accuracy (Weick *et al.*, 2005). Therefore, this characteristic of sensemaking sits well with qualitative research, where a plausible story is most crucial. From qualitative research, researchers can derive a logical story, through their interpretation of informants' accounts (Corbin and Strauss, 2008). The interpretation by a qualitative researcher is subjective; nevertheless, qualitative research is valid, as long as the researcher's analysis best explains the case in question.

On the other hand, the science aspect of qualitative research refers to the systematic collection and analysis of the data (Glaser and Strauss, 2009). That is, to ensure the scientific nature of the research, both data collection and analysis should be scientific. The scientific characteristic of qualitative research will be demonstrated through the data collection and analysis in the present study, which addresses the criticisms of reliability, validity, and generalizability of qualitative research (Travers, 2004; Denscombe, 2010).

4.3. Case study

A case study is deemed to be the most appropriate strategy for answering 'how' and 'why' questions in contemporary settings where the researcher can exert little control (Yin, 2009). Parlett and Hamilton (1972) also argue that research questions determine the methods adopted. As shown in previous sections, the research questions developed in this project are of the 'how' and 'why' types.

Case studies are also the most appropriate approach to investigate complex and dynamic processes (Thorpe and Holt, 2008; Denscombe, 2010), and especially to explore the relationships between organisational behaviour, process, and context (Hartley, 2004). The aim of this study is to examine people's work role identity, the way in which they engage in sensemaking, and their related behaviour. In addition, a case study may be used to discover new themes, build theory, and understand everyday practice (Hartley, 2004). Given that new themes and theories are likely to emerge during this study, and due to the limited research on prospective sensemaking and the relationship between work role identity and sensemaking, a case study approach proves to be the most suitable method for this study.

This section begins by describing the history of the multi-skilling Project used in this study. Then, the rationale for choosing the Project is provided, with regard to current studies involving changes to people's roles.

4.3.1. The multi-skilling Project

The empirical evidence for this study is the Project. The Project is led by the Heads of Housing from the five Borough Councils in Greenshire (including Blue Borough Council,

Red Borough Council, Grey Borough Council, Green Borough Council, and Black Borough Council). However, at the time of the study, the Project only covers Blue Borough Council, Red Borough Council, and Grey Borough Council. The Project seeks to provide services related to home repairs and adaptations for elderly, disabled, or vulnerable people, so that they can live independently in their homes.

Since 2005, local authorities in Greenshire have introduced several change initiatives that seek to meet government policy demand for budget cuts, and, at the same time, the increased demand of the housing service due to an ageing population in the region. The specific initiative upon which this study focuses, the Project, was firstly introduced as a pilot by Blue Borough Council and Red Borough Council in July 2011, following 12 months of development which started July 2010. In the second phase, the Project was extended to cover the Grey Borough Council in December 2012, and to include the Green Borough Council and the Black Borough Council later. The following section focuses on the recent history of the Project. Evidence is drawn from documents such as meeting minutes, training files, and job description documents.

Table 4. 1. Timeline of the project

	The Project Development			The Project Implementation			
Time	Relocation Jul. 2010	Review Sep.-Dec. 2010	Preparation Jan.-Jun. 2011	Three-month pilot Jul.-Sep. 2011	Six-month extension Oct.2011-Mar. 2012	'Going live' Apr. 2012	Solo visiting May. 2013

The development phase of the Project ran from July 2010 to June 2011, and included the relocation, review and preparation (Table 4.1). The Project was officially implemented from July 2011, itself consisting of a three-month pilot, six-month extension, 'going live' (official confirmation of carrying out the Project) and solo visiting (official change of staff job title).

During the Relocation period (since July 2010), the Occupational Therapists (OTs) and the Occupational Therapist Assistants (OTAs) were relocated from the Greenshire County Council offices to individual Borough Councils. From September to December 2010, middle managers from each of the five Borough Councils were then instructed by their Heads of Housing to lead a review, concerning the delivery of the adaptation and other housing related services.

The Review (September to December 2010) collected data related to the process of the service, the time needed to complete the work, and service user feedback. A flow chart relating to the working process at that time was drawn up and subject to review, with a good deal of criticism about the process. The Review was attended by middle managers from the five participating organisations and three staff, including one Occupational Therapist, one Case Worker, and one Technical Officer.

After the Review, the middle managers prepared for the launch of the Project from January to June 2011. During the preparation, a management consultant was brought in to provide middle managers with additional insights as to how to implement change and prepare staff for the launch of the Project.

The Project included four main stages, i.e., pilot, extension, going live and solo visiting (Table 4.1). During the first three stages (from July 2011 to May 2013), the Occupational Therapists and the Occupational Therapist Assistant, the Case Worker, and the Technical Officer shadowed each other and learned each other's skills. The purpose of this shadowing process was to enable all staff to do all the assessments, i.e., medical (both telephone and face to face), financial, and feasibility assessments.

During the six-month extension, some staff reported to the Union and involved Union in the Project implementation. The Union involvement incident happened in February 2012, about

eight months after the implementation of the Project (July 2011). As a result, several meetings were conducted between staff and management with Union representatives' presence. The Union's involvement compelled the management to rethink about the team structure and job descriptions for staff.

In May 2013, a consultation meeting was then held with staff, and the job titles of Occupational Therapist Assistants, the Case Worker, and the Technical Officer were officially changed to the Housing Assessment Officer (HAO). Meanwhile, the OT job title remained unchanged, although they focused only on complex cases. Thus, from May 2013 onwards, apart from the newly recruited staff, other staff stopped shadowing each other and carried out all the assessments on their own: the medical, financial, and feasibility assessments.

The standard working process prior to the Project was that when a service user phones in (no telephone medical assessment required, only the details of the customer is noted down), an occupational therapist or an occupational therapist assistant visits the service user in their home, assesses their needs and recommends adaptations (medical assessment); then a technical administrator visits the service user's house and checks the feasibility of the recommendation (feasibility assessment); this then is passed on to a caseworker for a financial assessment and charitable funding application (financial assessment) (Table 4.2).

With the multi-skilling Project, all staff were required to carry out three assessments, i.e., the medical (including both telephone medical assessment and face to face medical assessment), financial, and feasibility assessments. Thus, the working process after the Project was that when a service user phones in (telephone medical assessment), one of the staff visits the client in their house, assesses their needs, and recommends adaptations (medical assessment);

at the same time, they check the feasibility of the recommendation (feasibility assessment), carry out the financial assessment (financial assessment), and apply for charitable funding for the client. For simplicity, face to face medical assessment is shortened as medical assessment, whereas telephone assessment is short for telephone medical assessment (Table 4.2).

Table 4. 2. Key stakeholders' roles in the service prior to and after the Project

Prior to the Project	After the Project
OT Complex medical assessment and making recommendations	*OT* Complex medical assessment and making recommendations; financial assessment, and application for charitable funding for service users; assess feasibility of the adaptation
OTA Less complex medical assessment and making recommendation	*HAO* Less complex medical assessment and making recommendations; financial assessment, and apply for charitable funding for service users; assess feasibility of the adaptation
CW Financial assessment, and apply for charitable funding for service users	
TO Feasibility assessment of an adaptation recommended by OTs/OTAs	

Source: Job specification and meeting documents

The Occupational Therapist and the Occupational Therapist Assistant are employed by Greenshire County Council, and therefore adopt a recording system issued by the County Council. The Case Worker and Technical Officer are employed by individual Borough Councils and record to their own system. Thus, with the Project, all staff have to complete two recording systems, i.e., the County Council and the Borough Council systems. However, with data regulation and protection, CWs and TOs cannot access the County Council system. In the Project, the OTAs, the CWs, and the TO are given a new title of the HAO. Table 4.2 outlines the main responsibilities of the key stakeholders prior to and after the Project.

Moreover, the five different staff groups have different levels of professionalization. More

specifically, the OTs in the UK are governed by a professional body, namely the British Association and College of Occupational Therapists. According to the definition given in Chapter 3 section 3.3, OTs are professionals. Professionals gain their knowledge through university qualification, socialisation in the field, and professional training. They are also governed by a professional body (Abbott, 1988; Currie *et al.*, 2010). Meanwhile, the OTAs and HAOs are less professionalised, since their professional experiences are gained only through socialisation in the field and professional training organised by the organisation. Finally, the TO and the CWs are non-professionals, since their work is more focused on the administrative side of the job.

4.3.2. Rationale for choosing the Project

Organisations in case studies are chosen mostly because they can offer theoretical insights into particular phenomenon (Stake, 2005; Eisenhardt and Graebner, 2007; Siggelkow, 2007). The Project provides an ideal site for examining work role identity in sensemaking, because of the changes in people's roles brought about by the Project. A multi-skilling project brings changes to one's work process, daily activities, and the people one encounters. Thus, a multi-skilling project can bring changes to one's work role identity.

Studies related to role changes have gained popularity within the health care sector over the past two decades, due to the multi-professionals working in the health care sector and pressure for more workforce (Martin *et al.*, 2009; Currie *et al.*, 2010). The current sociology literature examines the challenges in promoting the new roles in organisations, and focuses on the professional boundary and domain (Martin *et al.*, 2009; Nancarrow, 2004; Cameron and Masterson, 2003). These researches show the extent of academic interest in studying changing work roles. However, this thesis goes further, by exploring how people make sense of the new role and why people hold certain views of the new role.

Moreover, visits to the field and the data collected suggest that emotions were aroused when people sought to make sense of the Project. Theories on the emotions and sensemaking are emergent, and limited research has focused on the role of emotion in the sensemaking process with a recent exception being that of Maitlis *et al*. (2013). Thus, the Project may serve to provide empirical evidence to analyse the dynamics between emotion and sensemaking. As Eisenhardt (1989: 537) argues, in order to develop or generate a theory, we should choose cases that are "likely to replicate or extend the emergent theory".

The Project in this study can therefore offer a rich and dynamic environment to explore work role identity in sensemaking. In addition, data concerning the emotions elicited by the Project may be used to extend current theories on emotion in sensemaking (Maitlis *et al*., 2013).

4.4. Data collection

Access to the field was granted in June 2012, and the first visit to the organisation was scheduled for early July 2012. Data prior to July 2012 were collected through interview and document analysis. In the first meeting in June 2012, one senior manager and one middle manager were present, along with a senior researcher and two novice PhD researchers. During the first visit, both sides articulated their objectives and concerns, and an agreement was reached at the end of the meeting. As a result, the Project Board granted access to both researchers, and assisted them in setting up interviews with staff and other relevant parties. The two PhD researchers would provide separate reports to the Project Board, and an individual PhD research plan was presented to (and approved by) the Project Board in the next Board meeting.

A case study approach can utilise a range of research methods such as focus group, interview, and observation (Hartley, 2004). In line with Stake (1995: 111), apart from semi-structured interviews, this project also adopted observation and documentary analysis. At the beginning of each interview, the researcher rearticulated her research plan and highlighted the importance of confidentiality, with interviewee being informed that he/she can withdraw from the interview at any time without specifying a reason.

4.4.1. Semi-structured interview

As the most common research method, interview is adopted by a number of scholars because it allows for a large quantity of information to be obtained in an efficient manner (Seba and Rowley, 2010). Interview is most suitable to examine the daily routines of the researched subject, and gain an insightful view of subjects' experiences and opinions (Travers, 2004; Denscombe, 2010). Interviews allow the researcher to understand the interviewees' perception about a particular phenomenon, derive emerging themes related to this phenomenon, and to allow for the investigation of complex phenomena (Kvale and Brinkmann, 2009: 1).

Some scholars argued that open-ended questions can ensure more data (Creswell, 2007). However, this research studies a particular phenomenon, that of sensemaking. Thus, an unstructured interview may lead to irrelevant data. On the other hand, structured interview is limited to discovering potential themes, which might be crucial to analyse the relationship between work role identity and sensemaking. Therefore, semi-structured interview is most appropriate for this research, since it can reduce irrelevant data while obtaining as much information as possible.

Nonetheless, researchers have found that interviews can provoke a 'knee-jerk' reaction, and

can be affected by impression management (Eisenhardt and Graebner, 2007). Longitudinal data collection and observation are thus helpful in mitigating impression management (Eisenhardt and Graebner, 2007). Meanwhile, other research methods such as observation and documents will also be adopted to cross check the data obtained from the interviews. The following section discusses the interview data collection process and the interview questions, as well as the rationale behind each decision.

LR (Literature Research) 1

IQ (Interview Questions) 1

Analysis 1

LR

IQ 2

Analysis 2

LR 3

IQ 3

Analysis 3

Findings
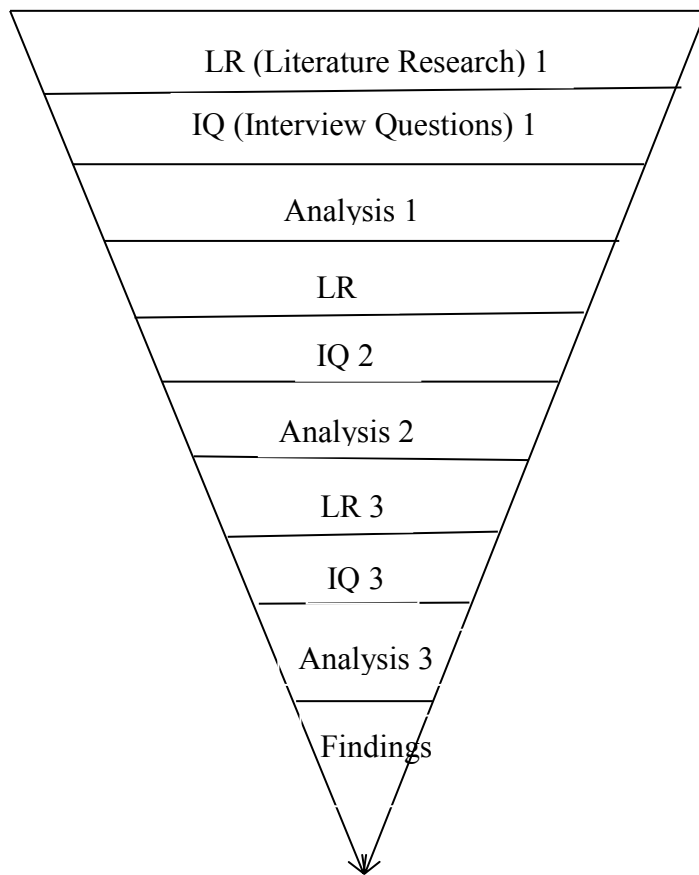
Figure 4. 1. Research process

Inspired by the data collection and conceptual development process proposed by Corbin and Strauss (2008: 144-145) and the idea of progressive focusing by Parlett and Hamilton (1972), a phased research and interview process was developed, as shown in Figure 4.1. Progressive focusing "begins with an extensive database, the researcher systematically reduces the

breadth of their enquiry to give more concentrated attention to the emerging issues" (Parlett and Hamilton, 1972: 18). Progressive focusing includes three stages: 'observation', 'inquiry', and 'explanation. 'Observation' is mainly focused on the research site and events. Certain issues noticed from the observation serve as a foundation for further inquiry. The final stage offers an explanatory story for the phenomenon under question.

Nonetheless, Parlett and Hamilton's (1972) "observation" stage might eliminate some interesting phenomenon, since certain issues are invisible to the observer. Thus, the idea of progressive focusing is adopted in this research, but in a slightly different way. That is, I will also use semi-structured interviews for data collection, rather than just pure observation.

Progressively redefined research issues and interview questions are crucial to qualitative case study (Stake, 1995). The core of progressive focusing research is to narrow down research issues and refine relevant extant literatures. The following section now discusses how I apply progressive focusing research to my study.

As shown in Figure 4.1, I firstly carried out an initial literature research (Literature Research 1), which generated initial interview questions (Interview Question 1, Appendix 1), examining the initiation, development, and diffusion of workforce development. Initial literature research and certain knowledge of the possible concepts can increase the researcher's sensitivity towards wide range of issues raised by interviewees (Eisenhardt, 1989). The first few interviews and observations allowed for a range of issues to emerge: work role identity, emotion, and sensemaking.

Subsequently, more literature research was carried out (LR 2), followed by a second round of interview questions (IQ 2). To conclude, the analysis of the first round interview formed the

basis for a second round of literature review (LR 2) and interview questions (IQ 2). The literature review and data gathering are iterative, and the process continues until data categories are saturated (Creswell, 2007). However, in this study, the data were saturated in the second round of interviews, as questions concerning the main themes of sensemaking were all covered.

The first round of interviews was conducted in July and August 2012. In the first round, 8 informants were interviewed, including four Senior Managers (SM), one Middle Manager (MM), one Occupational Therapist (OT), one Case Worker (CW), and one Occupational Therapist Assistant. Questions used in the first round interview are listed in Appendix 1. When analysing the first few interviews and the initial observations, I found that my original focus on workforce development did not fit with what I was hearing and observing in the field. I was surprised by the different accounts given by different staff groups about change, and subsequently, my research shifted focus to work role identity, emotion, and the sensemaking of different occupations. With new issues emerging from the data, I referred back to the extant literature for more conceptual insights. As Gioia *et al*. (2012) state, research questions and findings are likely to change with the research process, as are interview questions. In this study, several questions were added to the second and third round interview to probe newly emerging themes (Appendix 1).

The second round of interviews took place with thirteen informants including two MMs, three CWs, three OTs, three OTAs, and two line managers in November 2012, December 2012, and January 2013 (Appendix 1). The third round of interviews took place in January and February 2014. The third round interview was conducted with 22 informants including six SMs, three MMs, two line managers, three OTs, and eight HAOs. There was a one-year gap between Time Period 1 and Time Period 2. The main reason for the gap was to reveal

possible changes to people's views and emotions towards the Project.

The interview questions in both Time Period 1 and Time Period 2 focused mainly on people's roles, emotion, and sensemaking of the Project (Appendix 1). These questions aimed to uncover work role identity and sensemaking by investigating the anomalies that informants noticed related to their roles brought by the change, their retrospection and prospection about the Project as well as their sensemaking about change. Some questions revealed informants' feelings towards certain aspects of their old and new roles and their changing feelings about the Project, so as to capture the dynamics between emotion and sensemaking.

By undertaking three rounds of interviews, the researcher developed some interview techniques such as asking dumb questions, double checking some claims, and deliberately misunderstanding interviewees' meanings (Stake, 1995: 65). Given the fact that I was a novice and foreign student, interviewees showed their understandings of the difficulties I had in gaining an awareness of certain issues, and provided a detailed explanation, which revealed some information that would not otherwise be obtained. If I had been an experienced native researcher, the interviewees might find these dumb questions annoying, and a good relationship might not have developed in the way it did.

I also discovered that during my first few interviews with informants, some interviewees offered interesting accounts after I stopped the recording (Corbin and Strauss, 2008). The following reasons might have attributed to this phenomenon. First, interviewees' thoughts were provoked by the interview, and therefore, they wished to express their opinions even after finishing the interview. Second, interviewees felt more secure without recording. In any event, I asked the interviewee's permission to take notes when the recorder was switched off.

In reflecting back on the interviews, and in order to avoid the switch off phenomenon, I found trust to be essential in the interviews. Trust between researcher and interviewees also meant that the latter might be more revealing in their account (King, 2004).

Thus, I focused upon gaining trust and building rapport before the formal interview commenced throughout Time Period 1 and Time Period 2. I tried to build rapport with staff by attending both official meetings and informal staff gatherings, such as breakfast meetings, staff birthday drinks and the Christmas lunch. These informal meetings built trust between informants and me and, as a result, they were able to share information with me and freely express their views to me. A close relationship with the staff enabled me not only to obtain more in-depth information, but also to see the emotional side of the informants in carrying out the Project, which otherwise would not have been accessible.

I also found that another way to gain trust and build rapport was to be open and reveal something about myself as a sign of intimacy and a willingness to share information, since the exchange of information between interviewees and interviewers establishes foundation for trust building (Holstein and Gubrium, 2004: 147). Moreover, the confidentiality of an interview is essential for a trusting relationship. I spent a few minutes before each interview, explaining to the interviewees that the research is confidential and anonymous. I also informed them how I would use and store the recordings, so that they felt reassured about the safety and confidentiality of their accounts.

4.4.2. Observation

Apart from semi-structured interviews, observation was also employed to collect data. Observation can take several forms, such as non-participant observation, participant

observation, structured observation, and unstructured observation. This study adopts a non-participant semi-structured observation. The rationale is as follows.

Non-participant observation means that "the researcher-as-observer makes no claim to be a participant and remains an outsider" in the research process (Thorpe and Holt, 2008: 142). This study examines prospection, work role identity, emotion in employees' sensemaking process. The task for observation was to note the reactions and behaviours of the research subjects towards incidents that affect themselves, and the events that could elicit the emotions of the research subjects. Therefore, non-participant observation is more appropriate.

Structured observation is restricted by "explicitly formulated rules" (Bryman, 2012: 272). On the one hand, predefined concepts may impose existing framework on the setting and eliminate some interesting and emerging issues (Bryman, 2012; Guthrie, 2010). On the other hand, an unstructured observation might become superficial because of lack of theoretical base (Guthrie, 2010). Therefore, semi-structured observation was adopted in this study; that is, I had a certain familiarity with existing theories prior to the observation and an open mind with regard to other interesting and emerging themes.

Nevertheless, nonverbal behaviours may be misinterpreted in observations (Guthrie, 2010). To present a fairer view, what has been observed and interpreted should be confirmed by the informants to eliminate misunderstanding (Patton, 2002). Moreover, informants might adjust their behaviours because of the researcher's presence (Thorpe and Holt, 2008; Bryman, 2012). Other methods such as interviews and documents should be combined with observation, to validate analysis from the latter (Thorpe and Holt, 2008; Guthrie, 2010).

Notes were taken manually during the observations, which were also audio-recorded with participants' consent. Following Guthrie (2010), notes included the setting, what people say and what they do, as well as their body language and facial expression. When doing observation, one should record as much information as possible (Corbin and Strauss, 2008; Eisenhardt, 1989), since something that was once not important might prove to be essential for data analysis and generate further literature research.

Given limitations of time, the notes taken during the observation was crude. Following this, I wrote field notes based on the unpolished observation notes immediately after the observation, when the happenings in the field were fresh in my memory. Field notes were descriptions of what happened during the observation. While producing the field notes, if something was unclear, I would go back to the recording and confirm what has been said by whom.

In this study, I observed four meetings of the team, one training session, and one conference as well as one meeting with all staff and managers, totalling 26 hours' observation (Appendix 2). Data from observation were mainly used to cross check the interviewees' accounts and reveal some of the phenomena that are not mentioned by the interviewee. Both what people say and what they actually do should be taken into consideration in validating analysis (Guthrie, 2010; Thorpe and Holt, 2008).

4.4.3. Document analysis

Documents serve as part of the data collected in this study, and documentary analysis should be carried out with other sources of data, in order to increase validity (Bryman, 2012). Documents present a 'reality' based on the potential readers and the context in which the

documents were produced (Atkinson and Coffey, 2010; Bryman, 2012). Thus, to get reliable data, the document analysis in this study was carried out with regard to the following guiding questions: when, where, who, and why the documents were produced, the form of the documents, and what is missing in the documents (Thorpe and Holt, 2008). Documents in this study included meeting minutes, training documents, and job description documents.

Meeting minutes since the official initiation of the Project were collected, including the meetings between staff and line managers, meetings among staff, line managers, middle managers, and senior managers, and meetings between middle managers and senior managers. To avoid any misrepresentation in my analysis of meeting minutes (Bryman, 2012), meetings were recorded with participants' consent, and the minutes were analysed in conjunction with the audio recordings. The training and job description documents were intended to determine the chronology of the Project and crosscheck the accounts of interviewees regarding their responsibilities and roles, both prior to and post the Project.

4.5. Data analysis

Analysis of qualitative research is designed to pull the issues or phenomena in question apart and piece them back together again in a more meaningful way (Stake, 1995: 75). Analysis is mainly a case of "asking questions, making comparisons, and talking in terms of concepts" (Corbin and Strauss, 2008: 20). In data analysis, an issue is broken into its components, which will be examined in terms of its properties and dimensions (Corbin and Strauss, 2008). This section shows how I broke the data apart and put it back together in a coherent way. First, I discuss the nature of this study through comparing theory building versus theory testing approach. Then, my approach to data analysis is presented, followed by an example of how I actually operated the principles of coding and the final conceptualization of emergent themes.

4.5.1. Theory building vs. theory testing

As mentioned in the previous section, following the initial data analysis of first round interviews, the study was adjusted from its initial conception of workforce development, towards analysis of the emerging theoretical themes of work role identity, emotion, and sensemaking. The initial interviews and subsequent literature review suggest that the framework created by Weick *et al.* (2005) was applicable to the emerging analysis. However, the framework produced by Weick *et al.* (2005) did not fully explain what was happening in the research field. Therefore, I sought to extend the framework to include prospection and work role identity within the process, and to increase the depth and the breadth of analysis.

Thus, as I have explained, a theory building approach is utilised in this study. A theory building approach tends to be most appropriate in the early stages of research on a topic or to develop an already researched but comprehensive issue (Eisenhardt, 1989). The theoretical framework presented by Weick *et al*. (2005) explains a considerable proportion of the data. However, the data I collected was richer than the framework allowed for, and some of the phenomenon cannot be explained fully. A close fit of theory and data could thus take advantage of the new insights possible from the data, and yields an empirically valid new theory (Eisenhardt, 1989). In short, the ultimate aim of my analysis was to develop a theoretical framework that explains the field phenomenon, which calls for an extension of the sensemaking framework presented by Weick *et al*. (2005).

4.5.2. Data analysis approach

In line with Eisenhardt (1989), this research seeks to extend the original theoretical framework generated by Weick *et al*. (2005), combining the existing literature and data analysis regarding the case. The following section firstly discusses analysis methods by some

scholars (Pentland, 1999; Corbin and Strauss, 2008; Gioia *et al*., 2012; Binder and Edwards, 2010; Pratt *et al*., 2006), and then my own data analysis process is presented. The data includes interview transcripts, observation memo and documents.

Table 4. 3. Levels of structure in narrative

Level	Definition	Example
Text	Particular telling of a story by a specific narrator	Actual text of his or her story: "when I showed up at the interview…"
Story	Version of a fabula from a specific point of view	A new employee's own version of how he or she was hired
Fabula	Generic description of a particular set of events and their relationships	How a particular person was hired: what happened, who did what
Generating mechanisms	Underlying structures that enable or constrain the fibula	Overall recruiting process: how people in general are hired

Source: Pentland (1999)

Pentland (1999) argue that data analysis should go beyond the mere description of the data, to look into the deeper meanings, so as to generate a higher-level mechanism or an underlying pattern that explains the phenomenon observed (Table 4.3). Similarly, Corbin and Strauss (2008) grouped data into lower-level and higher-level concepts. The lower-level concept is closely associated with the data, and often adopts the phrases and expressions given by the informants. On the other hand, a higher-level concept is often an abstraction of the lower-level concept and has more explanatory power. Different lower-level concepts may be categorized under one higher-level concept.

Gioia *et al*. (2012) also presented a way of developing inductive concepts, and at the same time, ensuring a scientific data collection and analysis. Gioia *et al*. (2012) adopt the notion of first order and second order analysis, which in essence, are the same as lower-level and higher-level concepts. A lower-level concept is derived from first order analysis, and both terms are closely related to the informants' accounts. Meanwhile, the higher-level concept

originates from second order analysis, both being focused on the theoretical abstraction of the lower-level concept and the first order analysis. Their approach shows the link among lower-level concepts, higher-level concepts, and the final theory developed.

The main difference between the scholars mentioned above lies in their views of the degree of the researcher's involvement with the existing literatures prior to analysing data. Corbin and Strauss (2008) believe that familiarity with theoretical concepts could lead to the imposition of concepts to data. Likewise, Gioia *et al*. (2012) argue that informants are "knowledge agents" of their daily work and organisation, and therefore, should be given the chance to express their views to allow new perspectives to emerge around a phenomenon, rather than going to the field with predetermined concepts for testing.

More specifically, at the beginning of the research, Gioia *et al*. (2012) set out a more general research question to guide interviews, and to avoid "confirmation bias", instead of investigating the literatures extensively beforehand to derive a more specific set of questions. According to them, a general research question enables the researcher to know enough, but not too much, so as not merely to confirm the findings from the literature or impose theoretical concepts upon certain data.

In contrast, Binder and Edwards (2010) argued that the knowledge of possible templates and concepts is essential to data analysis. The first step in Binder and Edwards' (2010) data analysis is to have some template categories ready. In this research, the data analysis is carried out with due respect to the relevant literatures reviewed, but with an awareness of possible new emerging themes. Thus, it falls between the models of inductive analysis set out above (Corbin and Strauss, 2008; Gioia *et al*., 2012; Binder and Edwards, 2010).

The similarity between the analytical frameworks of Pentland (1999), Corbin and Strauss (2008), and Gioia *et al*. (2012) is the inductive analysis of raw data and the inverted pyramid conceptual ladder (Figure 4.2). Other scholars such as Pratt et al. (2006) and Binder and Edwards (2010) have also adopted the conceptual ladder. The conceptual ladder allows one to draw from common phenomena and gradually comes to the theoretical framework. The next section details how I analyse my data using the conceptual ladder.

Description

Lower-level concepts (first order

Higher-level concepts (second order analysis)

Categories/abstract

Theoretical
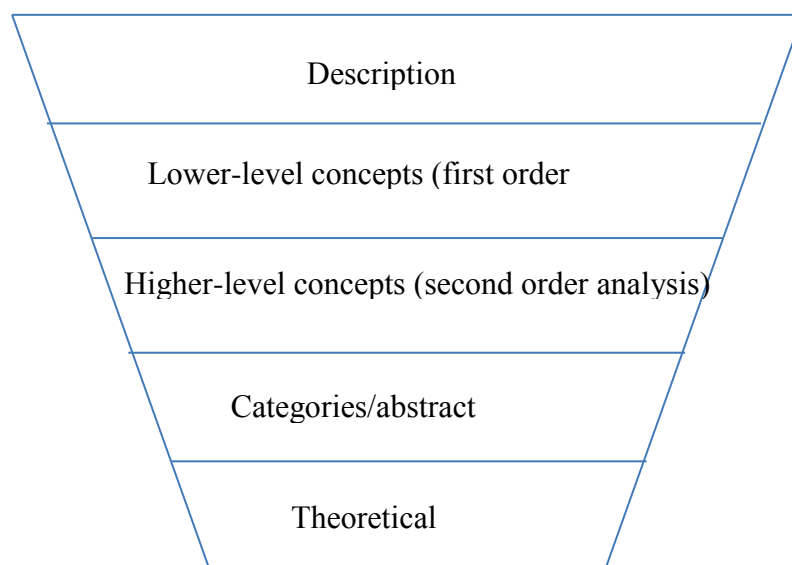
Figure 4. 2. Conceptual ladder

My analysis began with an immediate transcription and analysis of each interview, leading to the development of a descriptive account of each informant, so as to get a grip on the enormous amount of data and to increase my familiarity with the empirical case (Figure 4.2, Description stage). As Corbin and Strauss (2008: 54) argued, description forms "the basis for more abstract interpretations of data and theory development. Eisenhardt (1989) and Pentland (1999) also argued that the explanatory power of a theory depends on a good story.

More specifically, I wrote up narrative accounts for all informants based on the sensemaking framework by Weick *et al*. (2005). I detailed all the anomalies an individual noticed and their

emotions with regard to these anomalies (The analysis of individual's accounts showed emotional element in their sensemaking). At the same time, I presented how each informant makes sense of the future development of the Project. These summaries, such as 'more recording and admin work because of the two recording systems' serve as a basis for conducting the first order analysis later on (Table 4.4).

Table 4. 4. Data coding structure

Summaries of quotations	First order analysis	Second order analysis	Aggregate dimension
1. More recording and admin work because of the two recording systems (frustration) 2. Taking CW role and overseeing the process, got lost in the process (frustration) 3. The process quicker than before due to staff empowerment and more freedom rather than the new process introduced by the Project (no specific emotion, disengaged) 4. Telephone assessment (anxious) 5. CWs doing OT role (no specific emotion) 6. Information overload for customers (no specific emotion) 7. Other staff asking whereabouts of Helen (anger)	Loss of core activities and values Challenges brought by new colleagues Encroached autonomy of working	Threatened role identity (with negatively valenced emotions)	Narrow sensemaking
People becoming more proficient doing the Project, but still mainly feeding the beast (recording)	The future development of the Project based on the realisation of core values	Future-oriented prospection	
Sensemaking outcome: Helen did not agree with the process, and believed that if people stick to their own role and specialism, the system would work better and more efficient. Helen left the Project a few months after the Time Period 1 interview			

Then, the analysis moved on to abstracting the properties and dimensions of the issue in question, so as to avoid the qualitative research being unduly descriptive. This was achieved through first order and second order analysis (Figure 4.2; Table 4.4). The first order coding is

used to derive lower-level concepts, where all possible meanings of the data should be considered, so as not to miss something important. The number of lower-level concepts derived from first order analysis might be considerable. In the first order analysis, the cues people selected for their sensemaking about the Project, their prospection, and their emotions towards these cues are analysed and summarised at a more abstract level, such as 'loss of core activities and values in the new role'.

Following lower level concepts, I conducted second order analysis, whereby the number of concepts was reduced by categorizing several lower-level concepts under one higher-level concept. Second order analysis is a practice of thinking theoretically and conceptually. The properties and dimensions of higher-level concepts could be examined by studying those of the lower level concept within each high level concept. For example, 'loss of core activities and values', 'challenges brought by new colleagues', and 'encroached autonomy of working' is abstracted as 'threatened role identity' (Table 4.4).

Finally, the theoretical framework was developed based on the higher-level concepts. At this stage of analysis, the phenomenon was explained in theoretical terms, and the dynamic inter-relationships among the high-level concepts were presented. For instance, the aggregate dimension in the sample case in Table 4.4 is drawn as 'narrow sensemaking', which brings together the high-level concepts developed in the second order analysis, i.e., 'threatened role identity', 'negatively valenced emotions', and 'future-oriented prospection'. As Eisenhardt and Graebner (2007) contend, theory can be derived from the underlying logical arguments of the constructs, which is from the analysis of the relationships among constructs. Moreover, in developing the theoretical framework, I found it useful to brainstorm alternative conceptual links and models, and rearrange how the concepts could be linked to each other by drawing

figures and graphs.

Following Pratt *et al.* (2006), the theoretical framework developed was examined and compared against the data to assess the fitness of the theory. On the basis of the data, it was possible to confirm, extend and sharpen the literature by comparing conflicting and converging literature. Consistent cases were able to confirm the theoretical framework developed, whereas contradictory cases provided an opportunity to refine and extend the framework (Eisenhardt, 1989).

Moreover, the study shows that the sensemaking process is messy, and the outcome of sensemaking and ongoing development of role identity involve several iterative mini-cycles. The initial sensemaking result provides individuals with the repertoire to re-examine or realign one's perceived self and the assigned role. There might be several mini-cycles during the Project, and these cycles are of arbitrary length. We only know what we know in this case based on data collected in Time Period 1 and Time Period 2, and thus, our analysis is a simplified version of the dynamics between role identity and sensemaking.

4.5.3. Data analysis techniques

Some techniques may be utilised for data analysis, and for developing lower and higher level concepts, such as asking question, making comparisons, using a flip-flop technique, waving the red flag, and examining negative cases, memos, and diagrams (Corbin and Strauss, 2008). Asking question enables the researcher to read between the lines and discover new interpretations and multiple realities. In my data analysis, apart from the normally asked who, what, when, how, and why questions, others such as frequency, duration, and rate, were also used, such as the frequency of Helen mentioning 'feeding the beast' in the interviews. As

Hamberg and Johansson (1999: 458) contend, episodes of interviews that feature tension, contradiction, and hesitation should raise researcher's awareness for questions.

In future analysis, a comparison may be made in regards to both lower-level and higher-level concepts. Different informants might assign different meanings to the same issue, and this can bring out the different dimensions and properties of a concept. Theoretical comparison is to use a theoretical framework or similar personal experience, to examine the phenomenon in a theoretical level. I compared concepts from the extant literature with those discovered in the data, so as to determine the similarities and differences. On the basis of the extant literature research and some data analysis, I generated a list of general properties and dimensions of the issue in question, and produced a framework, which was used as a comparative base to further analyse the rest of the data. Then, further analysis either adjusted or enriched the original framework.

In terms of future analysis, I will seek to use a flip-flopping technique to examine "an opposite or extreme range of a concept to bring out its significant properties" (Corbin and Strauss, 2008). Corbin and Strauss (2008) also pointed out that the analyst should be cautious in interpreting expressions that indicate an extreme such as always, never, everyone, since a good qualitative research should examine things in dimensional level rather than "one point along a continuum". Moreover, it would be both interesting and useful to examine the "sometimes" and the conditions that are likely to lead to such dimensional variations.

I also wrote memos after each interview and observation. Later, these memos were used in the first order analysis to explore the possible meanings of a concept. The field notes taken during an observation were more descriptive, whereas the memos were more theoretical concepts. Following Corbin and Strauss (2008), I wrote field notes documenting each

incident observed, and soon after this, a memo based on the field notes was produced for more in-depth thinking. Memo-writing was also helpful for the next round data collection, since familiarity with the data is generally improved through writing and thinking. I was thus more sensitive to the issues that might be described by the next interviewee, and asked more appropriate/useful questions.

Modeling the change process and generating diagrams to represent this process were also key aspects of my data analysis. This proved to be useful in helping me to focus on the essence of the analytical dimensions of the case. The diagram derived in this study is built on that of Weick *et al*. (2005). At first, work role identity notion was brought into the analysis, and gradually, the diagram became more complex. As the analysis progressed, the model of the sensemaking process and the related diagrams required refinement.

4.6. Reflexivity on data collection and analysis

The case study approach, as with all qualitative research, has been seen as liable to be influenced by the researcher. Indeed, the researchers' own identity such as occupation, age, gender and ethnicity, influences the research process and outcome (Creswell, 2007). Moreover, researchers have their own values and beliefs, which are shaped by their background (Denscombe, 2010), and therefore, are certain to influence the way they interact with those being researched. For example, data gathered and analysed by a novice foreign researcher is likely to be different from that of an experienced native professor. In addition, the interview place and time can also affect research results. Although the list is endless, the most important thing is to be reflexive, i.e., to constantly reflect on what is done and what could have been done, as mentioned in the switch off phenomenon.

Data, particularly interview data, is a conversation between research subjects and the researcher, which might be influenced by both the researcher and the researched. Thus, reflexivity in the research process is important (Corbin and Strauss, 2008). Data gained through interviews is subjective (Stake, 2005), as is the researcher's interpretation of data. Thus, the researcher can impact on how the data is interpreted. Meanwhile, the data collection and analysis process can affect the researcher's values and way of thinking. Therefore, the researcher should be aware of their own feelings and emotions towards the researched.

Chapter 5 OTs and OTAs

5.1. Introduction

The following two empirical chapters (chapters 5 and 6) analyse the data from the Project, with a particular focus on prospection, work role identity and emotion in sensemaking. Time Period 1 and Time Period 2 data are analysed together, to detect the change in the way in which employees make sense of the above-mentioned elements in making sense of the Project. Chapters 5 and 6 focus on each individual's sensemaking about the Project across five different staff groups, i.e., the Occupational Therapist (OT), the Occupational Therapist Assistant (OTA), the Case Worker (CW), the Technical Officer (TO), and the newly recruited Housing Assessment Officer (HAO) involved in the Project.

As mentioned in the previous chapter, I wrote up narrative accounts for all informants, based on the sensemaking framework by Weick *et al*. (2005). Following this, I detail all the anomalies that each individual noticed, and their emotional response towards these anomalies. Following this, I present the cues that people selected for their sensemaking about the Project, and their emotions elicited by these cues. At the same time, this chapter analyses how each informant makes sense of the future development of the Project.

All staff in each group were analysed; however, due to the space limit and for the sake of simplicity, only one example is given in the case of similar sensemaking patterns. Chapter 5 focuses on the OTs and the OTAs, given the similarity between the OTs and the OTAs. There are six OTs in the Project (Helen, Laura, Adele, Leo, Edward, and Victoria) and three OTAs (Emily, Justin, and Sally). Since the case for the OTs and the OTAs are quite similar; thus, to avoid redundancy, the following analysis only covers OTs. The following sections will

present the data analysis according to the different sensemaking outcomes of the informants.

The managers of the Project also recognised the differences in the outcomes of staff sensemaking. For example, in Time Period 1, Ashley found that there is a mixed picture of the sensemaking outcomes of the OTs and the OTAs.

"…I think some OTs and OTAs are now embracing the change, and quite excited by new roles, new opportunities, and I think some of them still put their head in the sand, like an ostrich, pretending it's not happening…"

Ashley (Manager, Time Period 1)

Also, Amanda noticed the views of the OTs and the OTAs about taking up the CW role, and their objections of the Project.

"…Some people had the idea that they were the professionals, and they shouldn't be doing casework. Even the OTAs, who have had no formal training whatsoever, felt they were superior to caseworkers…"

Amanda (Manager, Time Period 1)

In Time Period 2, Kevin found that the OTs give high importance to their original roles and some of the OTs left the Project because of the changes in their work roles.

"…They (the OTs and the OTAs) say to themselves, I don't want to dilute that (their original health professional role)…"

Kevin (Manager, Time Period 2)

"...Justin (OTA) wants to be an OT, and I think he would find it better to be an OT in the environment he's gone to (the new job Justin accepted)…"

Kevin (Manager, Time Period 2)

5.2. Disengaged actor

Victoria (OT), Helen (OT), Emily (OTA) and Justin (OTA) all objected to the Project ethos, resulting in their leaving the Project. Here I analyse Helen's account as an example, with some illustrative quotes from other informants.

Table 5. 1. Data coding structure (Helen)

Summaries of quotations	First order analysis	Second order analysis
1. More recording and admin work because of the two recording systems (frustration) 2. Taking CW role and overseeing the process, got lost in the process (frustration) 3. The process quicker than before due to staff empowerment and more freedom rather than the new process introduced by the Project (no specific emotion, disengaged) 4. Telephone assessment (anxious) 5. CWs doing OT role (no specific emotion) 6. Information overload for customers (no specific emotion) 7. Other staff asking whereabouts of Helen (anger)	Loss of core activities and values Challenges brought by new colleagues Encroached autonomy of working	Threatened role identity (with negatively valenced emotions)
People becoming more proficient doing the Project, but still mainly feeding the beast (recording)	The future development of the Project based on the realisation of core values	Future-oriented prospection
Sensemaking outcome: Helen did not agree with the process, and believed that if people stick to their own role and specialism, the system would work better and more efficient. Helen left the Project a few months after the Time Period 1 interview		

Helen was employed by the Greenshire County Council. As an OT, Helen's main job was to visit and assess people for aids and adaptations to the home. If adaptations were required, she would make recommendations to the County Council, which were then sent to individual

Borough Councils. Her role prior to the Project was assessing and making recommendations of adaptation related to housing improvement service. The role set of Helen included OTAs and her line manager. Only one interview was conducted with Helen, since she left the Project between Time Period 1 interview and Time Period 2 interview.

With the Project, Helen noticed the following happenings: 1) more recording and admin work because of the two recording systems; 2) taking on the CW role and overseeing the process; 3) the process quicker than before; 4) telephone assessment; 5) CWs doing the OT role; 6) information overload for customers; 7) other staff constantly checking her whereabouts.

According to Helen, there was too much administrative work and too many recordings because of the two recording systems required by the Project. She claimed that 90 percent of her time was recording and doing admin, which does not comply with how she was educated and trained as an OT. Helen also expressed frustration in managing the two systems and engaging in admin work.

"...if I take 100% of my time, I probably take 10% face (to face) client time, and 90% feeding the beast (doing admin work), and that annoys me to death...copy and paste that, you are just doing, for God's sake...you are just feeding the beast. So that's how it feels, it feels very heavy for admin and things..."

"...It's frustrating at times, because there is new system, there was nothing they've done at the time. Same thing would be recurring is the IT issues, and stuff like that hold you back really...I think we all struggle, because we got two systems to manage, you know, you put something down, and then it's only perhaps a few weeks later you would say, oh, I forgot to

do that, or I forgot to send for approval, it's a lot harder to manage than it was…"

<div align="right">Helen (OT, Time Period 1)</div>

Helen was frustrated that she often got lost in the process and was unable to remember where she was with each case, whereas in the old process, she knew her case inside out and could move among cases easily. That is, managing the whole process from start to finish gave Helen a sense of being unprofessional, since she had not mastered the CW role.

"…I knew exactly what I was doing before, and now what am I doing? What do I need to do next? Oh, I've forgotten that, oh, I need that, oh, I've got to send an email for that, you know, it's frustrating I found it…It has been, learning all those processes have been frustrating, and I suppose we have changes within County as well, so we have changes there, and when we start the project, we've got lots more changes, so learning lots of things all at the same time, and you think, OH GOD…"

<div align="right">Helen (OT, Time Period 1)</div>

Helen also argued that CW was more of an admin role, which involved collecting information, writing letters and advising on benefits. Her skills were wasted doing admin and those additional tasks other than OT assessment. To put it another way, taking the CW role affects Helen's role identity as an occupational therapist.

"…Oh, I love that bit (the OT bit), it's what I'm trained to do, and the rest of it, you know, you just think I'm the wrong person to be doing this (caseworker role), you know, I don't mean just because I'm an OT, I shouldn't be doing it, it ain't my strongest thing really, we've got to give it somebody who knows what they are doing…"

"…I wouldn't work there, I probably wouldn't have gone down this route doing all this

different roles, all this additional tasks, you know, cause I feel my skills are wasted really, doing admin, feeding the beast..."

<div align="right">Helen (OT, Time Period 1)</div>

Helen also noticed that the adaptations that the Project provided to customers were done more quickly than before; however, she argued that the quick service was resulted from staff empowerment and more freedom given by the Project rather than the new process. Helen did not express enjoyment or happiness towards the quicker process, and there was no specific emotion expressed in this instance.

"...But obviously things were stricter then, we were guided by criteria, we haven't got the freedom we've got now where, you know, we could make decisions quicker. We've got other things we need to do first, so to a degree, after the Project, after the Review being completed, I think oh, they would speed up the process, and they have to a degree...they've taken out the paper work for all the grants, grant application, you know, they've reduced it, make it easier to work with, speeded up things with regard to approval and things..."

<div align="right">Helen (OT, Time Period 1)</div>

Helen felt anxious when doing the telephone assessment, because there were too many other tasks rather than purely doing initial medical assessment on the duty desk. Here, Helen's role identity as an occupational therapist was affected with the other tasks. Moreover, Helen believed that unqualified staff should stay at the duty desk and do the telephone assessment, since OTs were more experienced, and could deal with all the cases, whereas OTAs and CWs could not.

"...Even when you sit at the duty desk, you have a, you know, we had a call that wasn't meant for us, inappropriate call, we have to log this, we have to log that, we have to log this, and we

have to log that, do this, and that. I know we need to capture the information in order to say, look, this is working and this is why it is not working, but it's just feel really heavy going sometimes. You know, trying to remember to record this and record that, it's not just that you take a phone call and you take information. You have to pass on and do something, and copy and paste it there, and I have to have a script sheet, cause I'm sure that, oh, have I done an inappropriate call, or where do I log in, so you do get a bit anxious I suppose…"

"…I suggested the unqualified staff at the desk, taking the calls, and getting the information, and then all the information goes to an OT. Because we know we can do everything, where the OTA and caseworkers have got a limited field which they can work in…"

Helen (OT, Time Period 1)

Helen noticed that CWs were taking on some of the original OT responsibilities. According to her, CWs would be able to do some of the OT work with experience and training, similar to OTAs. Interestingly, Helen did not express specific emotions towards the CWs taking on some of the OT role. The following reasons might explain the phenomenon. First, Helen believed that an OT could only be replaced by another OT, and therefore, she was not worried about her job security. Second, Helen argued that OTs could do everything related to occupational therapy, while CWs and OTAs had a limited field to work in. Third, Helen contended that OTAs and CWs might lack the knowledge of the theories behind the adaptation services, whereas OTs had mastered the underpinning philosophy.

"…We train our OTAs, but you know, at some point, you have to go out and do it, and then come back and talk about it, you know, it's only by doing it you learn, same as OTs really, it's just we've got the theories behind why we are doing it, but I must suppose that I did not feel threatened by caseworkers doing what would be an OT role…"

In addition, Helen found that one person doing the whole process could create information overload for customers. Helen was quite empathetic in regards to the confusing and overwhelmed customers.

"...I think for the customer, well, they may not say this, I suppose, it depends which work you get. I almost feel like it's information overload, they are getting, cause when I was out before, I was just doing OT work. I will give them information about facts, about this, about that, and they would think, oh, my god, who is doing what? Cause it's a big wave coming at you, all these information. I'm gonna send you this report, I'm gonna do that, and now we get, especially if somebody is facts eligible, we have to explain about the Project, we have to explain the fact that we are gonna do an assessment that, explain that we want financial information, and I think sometimes you go away, and they would be like, my god, what was that?...I think having the right knowledge at the right place at the right time doesn't have to be everything all at once, which is why we are doing a little bit..."

<div align="right">Helen (OT, Time Period 1)</div>

Helen attached considerable importance to her autonomy at work, but this was challenged by her new colleagues. The dissatisfaction and hostility expressed by others in the team towards Helen contributed significantly to Helen's perception of her work role identity.

"...Sometimes, you know, what was she doing? Where is she going? Well, I was working, but why is she not here all the time? It was a bit of resentment, and lots of, you know, grumpiness and stuff, and I think for me, that's what it did for me, that's why I decided I need to leave, I can't deal with it..."

<div align="right">Helen (OT, Time Period 1)</div>

Similarly, Victoria regarded her autonomy of working highly and was unhappy about the line

manager questioning how many cases she handles per week. Victoria argued that after the Project, her autonomy of working was encroached, since the managers tried to decide how much work she should be doing, which never happened prior to the Project.

"...Lydia said that Victoria should aim for at least four more cases a week. Upon hearing this, Victoria was not happy, and said that "I would do seven to eight cases a week, and I would not be pushed to do more visits than I physically and mentally could". Victoria also claimed that: "I have never being queried by the line manager before. I do not like the fact that I have being queried of the work I've done"..."

(Staff meeting observation 2)

Four anomalies, taking caseworker role (doing admin and recording), overseeing the process, telephone assessment, and other staff asking Helen's whereabouts, were taken as sensemaking cues. Helen expressed frustration and anxiety talking about these anomalies. Also, being an OT made Helen feel a sense of professionalism, whereas taking on the caseworker role, a new role she was not proficient, made her feel a loss of professionalism. Helen was anxious to conducting telephone assessments, since it stretched her role as an OT to include other services in housing and other inappropriate calls. Helen also argued that doing telephone assessment was a downgrade from OT for her.

However, Helen did not engage in all the anomalies she noticed. For example, Helen did not engage in the quicker process, CWs doing OT role, and information overload for customers. The main reason for this lack of engagement might be that these three anomalies neither affected her work role identity as an occupational therapist, nor elicited her emotions or influenced her valuing of autonomy.

Helen presumed that the Project was intended to get people to do more work and to provide a better service. She argued that the Project would result in more work being done with the same money or less, because each staff is doing more in their role than they did before. On one hand, Helen stated that the Project is customer-focused, since the new process was quicker, and only one or two people were involved in the process. She argued that she would love to have only one or two people helping her mum regarding adaptation, rather than several people. On the other hand, she argued that the old process was better than the new process brought by the Project, since working within one's own knowledge base would be more efficient.

"…Everybody's got to be multi-skilled now, you can't just be an OT, you've got to be a bit of technical person as well, liaison with contractors. So the roles change, maybe it's just trying to get people do more works, you know, without losing any one particular person…I think with this one they are just trying to get a better service, you know, just a more smoother (service)…"

"…But from a customer's point of view, customer-centered…We all agree with the task of the project, and that was good, we want that. Without customers, we are out of a job, we are working for, you are a public body. So I don't think it's the actual task of the project, I think it was all the other things of the team, the team is trying to gel with each other…"

<div align="right">Helen (OT, Time Period 1)</div>

Helen also talked about the future development of the Project, and asserted that people would be quicker in doing the new process brought by the Project. However, she also pointed out that her job would be mainly to feed the beast.

"...It's supposed we will speed up. People will be quicker at what they are doing, because they are doing it all the time. So we have to see more customers once they've got the system...Because we are doing more in our post that we did before, more work would be done with same money or less...but you are just feeding the beast (recording on the computer)..."

Helen (OT, Time Period 1)

Helen did not agree with the ethos of the Project, and her emotions of the anomalies she noticed were mostly frustration and anxiety. She believed that the system would work better and more efficient if people stick to their own role and specialism, the staff was empowered, and some of the waste in the system was take away. The action Helen took was to leave the organization a few weeks after the interview, and to disengage with the Project.

To sum up, Helen expressed anxiety and frustration towards the anomalies that threatened her role identity, i.e., more admin work, taking CW role and overseeing the process, and telephone assessment, and other colleagues asking her whereabouts (Table 5.1). Helen valued her OT role. The threat to Helen's work role identity was reflected in the following two aspects. First, her autonomy of working was challenged by new staff. Second, Helen did not identify with the activities and norms of her new role brought about by the Project. This echoes other members' claims in this category, such as Victoria.

"...At the first session of the training, there was heated discussion about sharing each other's role. Victoria claimed that "I don't know anything about casework. I don't know what I am doing here (in the training session)"...During the lunch break, the researcher was initially chatting with Justin (OTA) and Leo (OT). Victoria came along and joined the conversation. She changed the topic to the Project and said, "I don't want my knowledge to be diluted; I am trained as an OT"..." (Observation from staff training)

5.3. Elite actor

Laura (OT) and Sally (OTA) exhibited similar sensemaking patterns; thus, the following section only takes Laura as an example, to explain how she made sense of the Project. Laura is employed by the Greenshire County Council. Her main job prior to the Project was to visit and assess people for aids and adaptations to their homes. If an adaptation was required, she would make recommendation to the Greenshire County Council, which would be forwarded to individual Borough Councils. Her role after the Project included not only assessing and making recommendations for adaptation related to housing, but also carrying out financial and feasibility assessments. The role set of Laura included OTAs and her line manager.

With the Project, in Time Period 1, Laura discovered the following anomalies: 1) some of her OT responsibilities have been given to unqualified staff (OTAs and CWs); 2) OTs have to learn CWs' skills such as doing means test, applying for funding, seeing the case through from start to finish, and other housing related services like repair; 3) there is more admin work due to the two recording systems; 4) OTs, OTAs, and CWs have very different philosophy and criteria for practice; 5) the mentoring role for members in the Project; 6) training; 7) single point of contact for customer; 8) telephone assessment; and 9) the quicker service brought by the Project. Laura's emotions accompanying the anomalies were summarised in Table 5.2. The following section analyses Laura's emotions of the anomalies she noticed, and her selection of the anomalies.

First, Laura found that the clear line of demarcation between the responsibilities of an OTA and an OT disappeared as the Project proceeded. The OTAs used to do minor adaptations and equipment, whereas now they are doing what the OTs used to do. Laura was worried when talking about caseworkers taking on the OT role. On the one hand, she argued that

caseworkers were not up to the job and could not master the skills of an OT.

Table 5. 2. Data coding structure (Laura)

Summaries of quotations	First order analysis	Second order analysis
1. Unqualified staff (OTAs and CWs) doing some original OT role (worry) 2. Taking CW role (frustration) 3. Two recording systems (frustration) 4. OTs, OTAs and CWs have very different philosophy and criteria towards practice (frustration and anger) 5. Mentoring the caseworker (disengaged) 6. Training (disappointment) 7. Single point of contact for customer (disengaged) 8. Telephone assessment (disengaged) 9. The quick process and service (satisfaction)	Loss of core activities and values Negatively valenced emotions Challenges brought by role set	Threatened role identity (with negatively valenced emotions)
OTs will be taken out of the Project in the future	The future development of the Project focused on OTs' job	Future-oriented prospection
Sensemaking outcome 1: The project is to cut down the OTs.		
1. Mentoring HAOs (enjoyment and excitement) 2. Representing and promoting the Project (satisfaction) 3. Delivering trainings to new staff (enjoyment) 4. Staff turnover (enjoyment, negative emotions here disengaged) 5. OTs taking up CW role (relief, disengaged) 6. Training (satisfaction) 7. HAO carrying out the new role (pleased and excitement) 8. Single point of contact (satisfaction)	Continuity of core activities and values Supportive line manager and other members in the team Postively valenced emotions	Enhanced role identity (with positively valenced emotions)
The diffusion of the Project to other Borough Councils in the region	The success of the Project now indicates a successful future of the County-wide Project	Past-oriented prospection
Sensemaking outcome 2: The Project is to deliver a more holistic, easier, and supportive service to customers.		

"...and also when you are working alongside somebody, who doesn't, has never worked in a

similar background, who has no knowledge of occupational therapy, it is very very difficult to

bring people in...Occupational therapist, you know, it's expected of us, we can take on more

extra work, work with people (who's) got complex neurological conditions, terminal cases people who are terminally ill, which are very very difficult to do if you've not had experience in that. It takes a long time…"

"…The thing is that they (CWs and OTAs) are not used to research conditions, health conditions, err, that sort of thing, whereas we are, we are more motivated if you like, to acknowledge things like pain, er, things like that, whereas they really don't…"

<div align="right">Laura (OT, Time Period 1)</div>

On the other hand, Laura was worried that if the OTAs and caseworkers became more proficient in performing the role generally fulfilled by the OT, she might lose her job.

"…I feel undermined, because I found that OTA's been given the job, my job basically. Because OTs are used to do major adaptations, and now I'm starting to motivate the assistant, does that mean they don't need OTs and our job is going to go…"

<div align="right">Laura (OT, Time Period 1)</div>

Second, OTs had to learn CWs' skills, such as doing means tests and applying for funding, seeing the case through from beginning to end, and other home improvement related services like housing repairs. Laura found that the CW role was very complex and tedious, since it included other services related to housing, rather than only adaptation.

"…To be perfectly honest, it (financial assessment) doesn't really interest me, I'm interested in what that person needs…to me, it is a tedious job to do, really. I don't like computer formulates for grants, feeding lots of numbers in, you know, and tune out another number. But to me, it's not what I'm trained to do, I might as well work in a bank…"

<div align="right">Laura (OT, Time Period 1)</div>

Laura found that applying for funding was very time consuming, and undermined her ability to work efficiently. Thus, she was frustrated to take on some of the financial assessment and carry out the means tests.

"...But it's very very time consuming and very, I'm not terribly motivated with that part of it, because it's not occupational therapy, you know, I'm trained to be a therapist, not to fill out endless forms, applying to funding...and they (the charities) have trustee boards, they have to sit and see whether to give you funding, and some of them only do every quarterly, and you only sit every month...You've got cases sitting around; you can't move on with, you can't process any further..."

"...so they have different assessment forms for different charities, they have to complete, some of the forms require, you just don't know why they want that sort of information..."

<div align="right">Laura (OT, Time Period 1)</div>

Laura also contended that the financial assessment was a very personal thing, and she felt uncomfortable and anxious to ask and assess people's financial situation.

"...I've never been comfortable, because I've never had to do it before, really uncomfortable asking people about their bank account, very personal thing. But we have to do it, and they have to go through the means test, and many people are open to that, they don't mind, but to me, personally, it's quite uncomfortable for me to just get somebody's personal finance..."

Third, Laura found that there was more admin work, due to the two recording systems; thus, the time that she could use to visit customers and do assessments was wasted on feeding financial information to the computer and filling forms. She was frustrated that she had to

record the same information twice on two different recording systems.

"…I still have to update the County Council's electronic recording system, try to keep up recording on two different systems for the same case, very very different recording systems, very very different…It's very, it's very very time consuming, and it takes the time you can actually going out the second time (visit), you know, so people are waiting longer and longer and longer…"

Laura (OT, Time Period 1)

Fourth, according to Laura, the OTs were qualified professional staff, and had the right levels of training, which enable them to have a holistic approach. Therefore, despite the fact that the OTAs and the CWs might have training courses and be able to do some of the OT's assessments, they lack the underpinning philosophy. Laura believed that certain skills needed in OT assessment could only be gained through professional training rather than several days' training courses. Also, the CWs had never worked in a similar background as OTs and OTAs; thus, it took caseworkers too much time to learn the OT role.

"…So many things aren't considered if you don't have that level of training, you know. There are training courses, you can do a trusted training course, they are planning to do…But nevertheless, it's about the holistic approach that OTs sort of adopt, so it's not literally somebody could get on and off a chair, it's just simply not about that…and I think you have to have that sort of underlying, sort of underpinned by that professional, that professional type of training, really, to do that…"

Laura expressed anger and frustration when talking about the different eligibility criteria used by the caseworkers and the OTs. According to Laura, OTs focuses on customers' level of needs, which are assessed against personal circumstances of the customer. On the contrary,

CWs focus on what the customers' wish, rather than what they need, which is a different practice philosophy compared to that of the OTs. She also gave an example of where a caseworker challenged her decision because of the different criteria that OTs and CWs abide by.

"...There have been some conflicts, with regard to eligibility, because I'm employed by the County Council, but I'm based on the Borough Council. They've got very different eligibility criteria for grants and things. So a person, any of our customers, has to have a certain level of need before we can recommend the County Council to fund whatever we are recommending...we have to work to their (County Council) eligibility criteria, somebody has to, they call a fair access to care services, our customers have to have that level of need..."

"...So I said, the County Council won't fund the adaptation and fund you to be dressed by other person, and I was challenged by my caseworker, and ever since then, they would say, oh, you did it for so and so, why aren't you doing this to this customer?..."

Laura (OT, Time Period 1)

As mentioned earlier, Laura was frustrated when fulfilling the caseworker role, and was worried about the unqualified staff (OTAs and caseworkers) performing the role originally undertaken by the OT. Laura's accompanied emotions of the first four anomalies (unqualified staff doing some original OT role, taking up CW skills, the two recording systems, and sharing OT skills with caseworkers) were negatively valenced emotions such as worry, frustration and anger. A possible reason might be that Laura's role boundary expands to include other non-OT related duties, which do not abide by her previous role identity as an OT. For example, there were certain values that Laura attached to the OT role such as helping people in need, which were not reflected in the practice of CWs.

Some of the anomalies that Laura noticed were not selected for her sensemaking of the Project. More specifically, Laura did not engage with mentoring the caseworker, training, and telephone assessment in her sensemaking about the Project (Table 5.2). These anomalies were briefly mentioned, but not extensively reflected on. Moreover, Laura mentioned some anomalies, but was not highly engaged in drawing on these cues for sensemaking. For example, Laura brought up single point of contact, which was deselected by concluding that "*it's difficult to say*".

"*…I think it's to put the experiences of the customer, only one person, so they don't have different people coming in to give same information time and time again to different people. I think if you pick up the case at the initial stage and through, I think it's a really good concept. I think it will be difficult to carry out, er, I mean, as you get more experience, it becomes more, but I think that, it's difficult to say…*"

Laura (OT, Time Period 1)

In addition, Laura expressed some satisfaction at the quick service customers get with the Project.

"*…What we do is because the work is done fairly quickly within a couple of months, we order the shower seats given the person's needs. So when the work is finished, it will be delivered. But that's the whole thing of lean system. They found that previously checking every single job was wasting a lot of time. It's taking an awful lot of time, which isn't necessary because vast majority of work is satisfactory, err, like I said, it's just the customer highlights to us now, they phone us to say, yeah, they are putting a ramp, it looks lovely, it's fine, but it looks a bit steep, and the wheelchair wouldn't move the way with me, is that right? Then we will go out. But we do telephone review, unless the customer tells us there is a problem, we don't go and*

review. We just close the case…"

Laura (OT, Time Period 1)

Laura only focused on the anomalies that affected her role identity and that induced moderately negatively valenced emotions. Laura believed that with the Project, the OT post would be taken away, and more unqualified staff would be recruited for the job in the future. Laura was thus engaged in thinking about what would happen in the future. Her sensemaking about the future was based on her conclusions about the Project. Laura asserted that fewer OTs would be needed, and there might be a cut down in the OTs, given that OTAs and CWs were doing the jobs that OTs were doing before the Project.

"…I think ultimately, I will be taken off the Project, because the OTAs will become (more proficient in doing assessment), because I think they want more unqualified staff to do the more sort of straight forward things…"

Laura (OT, Time Period 1)

To sum up, Laura did not identify with the work role identity associated with the Project. The actions Laura took were to distance her from the CW role and keep her to the OT role. Laura developed a negative view of the Project and its future, given her negatively valenced emotions and her interpretation of the purpose of the Project, i.e., cutting down OT staff.

"…What we (OT and CW) do is, before we go out (to visit customers), we say, right, I'm going to ask about this bit, and you ask about that bit. We would encourage each other to do each other's role. I would say, ok, I'm gonna leave that side of the assessing (financial assessment) with you, with the bank. I will do the part of the toileting and bathing…"

Laura (OT, Time Period 1)

Across Time Period 1 and Time Period 2 interviews, Laura's sensemaking about the Prjoect changed and her emotions towards the anomalies also changed. The following section analyses Laura's sensemaking process in Time Period 2.

In the course of the one and a half years between the two interviews, Laura noticed the following happenings: 1) mentoring the HAOs in the team; 2) representing and promoting the Project; 3) delivering trainings to new staff; 4) staff leaving and new staff joining; 5) Laura gained more experience in CW role; 6) more formal trainings put into place; 7) people taking up the skills required to do HAO role; 8) single point of contact. Laura's attitudes and emotions towards the above mentioned anomalies and her selection of certain anomalies as sensemaking cues are presented in the following section, with illustrative quotes.

First, with OTs and OTAs leaving and new staff joining, Laura had to mentor the HAOs and new staff, since she was the only experienced OT in the team. She delivered trainings for others, and had the opportunity to practice her OT philosophy. Laura showed enjoyment and excitement in mentoring the HAOs and practicing her OT philosophy in the office. Previously, in the Time Period 1 interview, Laura mentioned her mentoring role as well, but disengaged in taking it as a sensemaking cue. However, in the Time Period 2 interview, Laura engaged in talking about the mentoring role, and highlighted its importance.

"...I'm mentoring other members of staff, in some ways it's better, because what I'm doing is I'm relating OT concepts to other members of staff about OT philosophy, what's important to us as client centeredness, how being occupational active is important to somebody's health and wellbeing, so I'm able to reflect on these, on OT philosophy with my colleagues, and share with them. I'm selling to them, so that they consider these things when they are

assessing people…so that's been quite good, er, because I'm able to air my professional

philosophy in the office, with other members of the team. I quite enjoyed that, er, so that's

really reiterated to me that I'm still, that's still embedded in me, in my beliefs and values as

OT, er, and I've been able to share those with other members of the team…"

Laura (OT, Time Period 2)

Second, Laura mentioned that she was asked to present and promote the Project to other organisations. Laura kept mentioning this, which showed that she was proud and felt privileged to be at these events. Representing the Project also led to Laura's satisfaction in working for the Project.

"…I did a poster last month for an event at Greenshire golf club about the housing

assessment team to promote the team…I can see where the managers are coming from, why

they wanted to try this Project…"

Laura (OT, Time Period 2)

"…After the conference, I shared a car journey with Laura and Lydia (CW). They exchanged

their views about the conference and commented that the presentation given by organisation

A, an integrated customer service, was very effective and powerful…They felt proud that they

obtained other skills that could help customers in the same way as the integrated approach

adopted by organisation A…"

(Observation notes from the Conference)

"…There was a Q&A after the presentation by the Project Board…The last question was

about the doubt that the project processed more cases more quickly, and what if half way the

budget ran out? One of the Project Board members stated that more preventative cases were

done, rather than waiting until the person needed very expensive housing adaptation. Then

Laura said that as a result of the Project, the staff were more knowledgeable in other areas as

well and could offer customers more options. For example, they could be referred to for other charitable funding…"

(Observation notes from the Conference)

Laura was asked to run a few training sessions for the HAOs, and she was quite pleased to be perceived as a senior who had gained a considerable amount of experience. These training sessions also enhanced Laura's OT role identity, since she could practice her OT skills.

"…I've been asked to deliver training with regards to social services criteria, to do with equipment, to do risk assessment, to do something with writing reports, all sorts of tasks, really…people say I'm a senior, but I'm not a senior, do you see what I mean, but I'm perceived to be a senior, you know (here Laura had a pleased smile), because, only because I've got the most experience…"

Laura (OT, Time Period 2)

Staff turnover led to Laura becoming the only experienced OT, with two key consequences. First, staff leaving gave Laura the opportunity to practice her OT philosophy, which enhanced her role identity as an OT and gave Laura the excitement to do the new role. Second, staff turnover resulted in a lack of peer support for Laura. However, her line manager accommodated the support that Laura needed. Therefore, Laura was disengaged in adopting the possible negative consequences of staff turnover as a cue for sensemaking.

"…I wasn't very happy (abut staff leaving), cause I've worked with these people for a while, and there were one two, there've been four experienced occupational therapist leaving, and I felt a huge burden of responsibility being the only experienced OT left, and I just felt I still do, to some degree, a little bit, yeah, I just feel like. Obviously I miss them, I haven't got that opportunity really to discuss my cases, my complex cases with, you know, my peers, I don't

feel I have peers in my team now, whereas I used to have four, who were in similar level, similar ability, similar experience to me, I don't feel I have, I feel I'm out on my own almost, er, so that cause, I do have supervision with my line manager, but because there are other issues to discuss in supervision, and, obviously limited time, and there is the only very very complex cases, if I feel something is very urgent and I need to resolve it, I will contact my line manager by email…"

<div align="right">Laura (OT, Time Period 2)</div>

Laura was relieved to find that she was more proficient in the CW role and the whole working process from start to finish. According to Laura, the CW role had become embedded into her daily practice and become part of her everyday role. Laura regarded the new role as a full service to customers. She also adopted a few strategies to carry out the CW role, such as using different phrases to do the financial assessment and explaining the required documents to customers on telephone prior to the home visit.

"…Regarding what I found compromising before, it just become part of everyday role now, so I don't think about it, the caseworks, the grants, that sort of business, I just think about how I provided a more rounded service to my customers…"

"…but again it's about, I've got my own way, I've learned how to discuss someone's finance in a way, isn't too intrusive, ok, to put the customer at ease, to ensure that they know all the information that's necessary…so I've worked out my own way of discussing it really, and it seems to be working, cause the customers are fine…"

Laura was happy that more training had been put into place for staff. All staff undertook some significant training, and OTs took training sessions for housing related services such as home safety. Laura's confidence in performing the CW role increased with the training courses.

"...There is a lot more formal training, er, with the Project, we need to provide quite a lot of evidence to justify why certain training is needed, because it's really a complex role, and OTs did not know much about the technical side, or the hazards, home safety, those sort of things, every member of the team has to undertake some significant training as well as mandatory training we have to do every year..."

Laura (OT, Time Period 2)

Laura asserted that the HAOs were getting on well with their jobs, and the competencies of the HAOs increased. She was satisfied with the competence of HAOs, and their ability to carry out some OT assessments. Laura believed that the HAOs she mentored would be able to master all the skills needed. She was excited that the HAOs she was mentoring would be able to fulfil the role, and take their own caseloads in the near future.

"...I'm mentoring them, and give up some of my work time to support them to learn the new role, and sooner they will be up and running, they will be able to take the cases off the list as much as I am...I can see the light of the end of the tunnel, because once their competencies are signed off, all 4 of those people will be able to take the caseload of their own..."

"...I think they are doing a really good job, they are taking more and more complex cases...there are one or two HAOs I wouldn't hesitate to pass that case to, you know, I can potentially support them, so I think they are doing really well..."

Laura received positive feedback from customers, and she was satisfied with the 'single point of contact'. Laura's sensemaking cue focused on the satisfaction she got from the customers for single point of contact. Nevertheless, as I mentioned earlier, a single point of contact was not referred to in Laura's sensemaking in Time Period 1. The main reason might be that at the

Time Period 1 interview Laura did not have many finished cases, which means she got less customer feedback and less satisfaction.

"...I thought it was good that the customer has one person to deal with, I still feel that's the case, that's the most positive thing out of the service, the person has only one person to deal with, we have really good feedback from customers about it, they know who to phone, they only phone me if it's my case, you know, and, er, I will act on their behalf..."

Laura (OT, Time Period 2)

The cues Laura had adopted for her sensemaking were more inclusive in the Time Period 2 interview. Almost all the anomalies Laura noticed were taken as cues for her sensemaking. The cues for sensemaking are anomalies that can either elicit positively valenced emotions, or enhance her role identity as an OT. The increased proportion of activities related to OT in Laura's daily job explains her more positive view of the Project. Laura's role boundary has expanded to include mentoring HAOs, participating in the development of the new service, and delivering some of the training to new staff apart from managing complex cases from start to finish.

As discussed earlier, staff leaving as an anomaly elicited some negatively valenced emotion, which was disengaged with support from Laura's line manager. Thus, the negative consequence of staff leaving was disengaged in the sensemaking process. Moreover, Laura disregarded taking up CW role as a sensemaking cue. The main reason for this might be that taking up the CW role was seen to be part of her everyday role, and no longer affected Laura.

Laura also envisioned diffusing the Project to the other Borough Councils in Greenshire and a successful countywide service in the future.

"...I'm hoping Green Borough Council and Black Borough Council who just adopted it, I'm hoping it will be countywide, already the different localities are doing it in a slightly different ways, and I thought it was aimed to be the same service for everybody in Greenshire, but that's not going to be the case, but, er, the team, hopefully next year new staff will be trained up, those are being mentored are going to be more confident, they would have a year's worth of practice under their belts, and we will be able to take cases on more quickly... and it will be up and running the rest of the county..."

<div align="right">Laura (OT, Time Period 2)</div>

Laura acknowledged the waste in the old process, and contended that the Project would deliver a more holistic, easier, and more supportive service to customers.

"...I think we are trying to deliver a more holistic, easier, more supportive service to customers, and I think we are doing that effectively, the feedback we had, like I said, having one person to work with, so that they don't get passed from one person to another, is definitely a benefit, but I think staff are trying to deliver a better service to customers, quite what managers are trying to do, I'm assuming that's what they want as well..."

<div align="right">Laura (OT, Time Period 2)</div>

To sum up, Laura's emotions towards the new anomalies brought by the Project changed to a great extent from negatively valenced emotions like frustration, worry, and angry to positively valenced emotions such as satisfaction, enjoyment and excitement. Her work role identity as an OT has also been reaffirmed in Time Period 2. Her reaction to the Project has changed from keeping a distance to the new role to actively implementing the new role. Therefore, Laura's sensemaking result of the Project in Time Period 2 is much more positive than that of Time Period 1.

5.4. Accepting actor

Adele (OT) is employed by the Greenshire County Council. Prior to the Project's inception, Adele's main job was to visit and assess people for aids and adaptations in the home. If an adaptation was required, she would make recommendations to the County Council, which would be forwarded to individual Borough Councils. Her role prior after the Project was to assess and make recommendations for adaptation related housing improvement services, and to carry out feasibility and financial assessments. The role set of Adele includes OTAs and her line manager prior to the Project.

After the Project, the role set of Adele includes OTAs, CWs, HAOs, and her line manager. Adele values visiting customers face to face, and the flexibility and autonomy of her job. The interview with Adele was carried out once, since she left between Time Period 1 and Time Period 2 interviews. The following section details Adele's sensemaking about the Project.

With the Project, Adele noticed the following anomalies: 1) The quick process; 2) Flexibility and autonomy remained in the new role; 3) Customer rapport is not as good as before and information overload for customer; 4) CWs doing the original OTA role; 5) Taking CW role and overseeing the whole process; 6) Two recording systems and admin work (Table 5.3).

Adele was pleased to see the benefits of the Project and the final outcome of the service, which she had not been able to see before. Adele found that with the Project, customers could get their adaptations quicker. The time scale for an adaptation prior to the Project was poor, and within the waiting time, customers' needs changed, and therefore, the service prior to the Project was a poor service.

Table 5. 3. Data coding structure (Adele)

Summaries of quotations	First order analysis	Second order analysis
1. The quick process (pleased) 2. Flexibility and autonomy remained in the new role (pleased) 3. Customer rapport is not as good as before, information overload for customer (worry) 4. CWs doing the original OTA role, OTs more professional (mild emotions) 5. Taking CW role and overseeing the whole process. For casework, Adele would take the financial information back to the office if not sure (mild emotions), job satisfaction seeing the final product (pleased) 6. Two recording systems and admin work (mild emotions)	Clear line between the roles of OTs and CWs Continuity of core activities and values Continuity of flexibility and autonomy Positively valenced emotions	Maintained role identity (with positively valenced emotions)
1. A quicker service to customers 2. Less OT jobs in the future Project	The future development of the Project is based on the current quicker service to customers	Past-oriented prospection
Sensemaking outcome: The project is to speed up customer journey, to cut down OT posts, and get good value for money. Adele accepts the Project with some doubts and concerns for her own job.		

"…Customers, they are happy, you know, things are done quickly, and also I went to see somebody today and they have a housing adaptation done 30 years ago, well, I spoke to them today, they need another housing adaptation, she did say how long this will take. So it's lovely to tell her how long this may take, so customers benefit from it…you know when a job is completed quickly, when you get positive feedback from customers, it's nice to get a compliment. I think that's job satisfaction, that's what I enjoy...I think with the new system now, it's quite good for the customer, because it's so quick…"

Adele (OT, Time Period 1)

Adele found that with the Project, she continued to be flexible and autonomous in arranging her time and learning. She was pleased that flexibility and autonomy, which she values,

remained the same.

"…The flexibility is good, the autonomy, you know, we are autonomous learners and workers as well. So really, we are trusted to do our work…I'm pleased with flexible working, I do some extra work at home some weeks, just because when I'm off on Friday, if I've done a visit on Thursday, I have to write that visit up. If I don't write that visit up when it's fresh, by the time Monday comes around, I don't remember everything…"

<div align="right">Adele (OT, Time Period 1)</div>

However, Adele expressed her concern and worry that customer rapport was not as good as before. She was also worried about information overload for customers with the Project. However, her worry was dismissed soon, and she argued that customers might only care about the final product. Thus, this anomaly was not taken as a sensemaking cue.

"…The customers have come through the case with speed now. But I feel we are losing a bit of rapport with customer, because it's so fast. But I don't know if the customer is bothered about that at all, as long as the customer gets their needs, they are quite satisfied…"

"…If we are visiting, for example, somebody's got Parkinson, I think that's the longest visit I've ever did, two and a half hours because of speech problems, and when you have to, so you do your assessments, get forms signed, you talk about hazards, maybe you offer a carer's assessment, which we are expected to do as well. I think it's a lot for somebody to deal with on one visit, and you know, you talk about the processes of contracts will be out, you know, the next couple of days, I think it's a lot for a customer to absorb in one visit. So I tend to feel I'm pressuring somebody to have something that they really want to speak to the family about…"

Adele was not concerned about CWs doing some original OTA skills. First, she recognized the difference between cases for OTAs and OTs, claiming that most of the cases are straightforward OTA cases. Second, Adele regarded OTs as more professional. For example, in the OT assessment, she used her own notes and asked customers more relevant questions; whereas CWs used tablets on their visits. Adele argued that tablets were a barrier to customers and could stop a practitioner from noticing the body languages of the customer, so that something important might be missed.

"...Well, they (caseworkers) are meant doing the OTA skills, it's like the less complex cases, probably I would say 70% of them are pretty straightforward OTA cases..."

"...I've done a few visits with caseworkers. So when we went out on a visit, they take their tablets, I usually print off my forms, get it signed. I use my own notes on a visit. I don't use tablets on my visits. I think it's a barrier to customers, and usually you can observe a lot of body actions when you are speaking to somebody, especially if there are family members there as well...I think probably we are more professional, we are probably better..."

Adele (OT, Time Period 1)

Adele's emotions towards taking up the caseworker role were quite mild, which might be explained by the following factors. First, if Adele was out on a visit and saw other hazards in the house before the Project, she would report them back to relevant colleagues. Therefore, Adele was used to providing other housing related services other than adaptation. Second, Adele would take the financial information back to the office, and ask caseworkers to deal with it. Moreover, Adele utilized the resources available in the office for other aspects of the work that she was not familiar with, which made it easier for her to take up the CW role.

"...sometimes if I'm not sure, I will take that information back and ask one of the caseworkers to fill in the information to the computer system...or I send an email to Mary,

cause Mary is like in charge of the technical team, I send an email to Mary, or to Mark for home safety issue, send an email to him, or send an email to John, he is the council properties, he deals with them…"

<div align="right">Adele (OT, Time Period 1)</div>

Adele found that overseeing the process gave job satisfaction since she could see the end product.

"…But we are there from day one right to its end, we've been involved with contractors, so we are there from start to finish. So it's good you can see the end product, job satisfaction is good…"

<div align="right">Adele (OT, Time Period 1)</div>

According to Adele, the Project involved an increase in admin work, because of the two recording systems. Thus, the time to visit customers was taken to fill in forms. However, she argued that staff were in control of their own time management to keep up the recordings.

"…and part of the OT role, I think we've got a lot more admin to do, there is just so much admin to do. We've got two tools, we've got two diaries to keep, err, three diaries to keep…So recording the two systems, it's time management…we are responsible for our own time management…"

As I observed, Adele was pleased to experience the quick new process, oversee the case for customers, and retain her flexibility and autonomy. Adele did not take doing financial assessment or caseworker doing medical assessment as a devaluation of her role identity, and her emotions towards the two anomalies were mild, which might be because the values Adele attached to her OT role, i.e., flexibility and autonomy, remained unchanged. A few anomalies

were dismissed in Adele's sensemaking. For instance, customer rapport was not taken as a sensemaking cue, since Adele argued that customers might not care about the rapport.

Adele also discussed the future development of the Project, and asserted that the Project provided a quicker service to customers. This speed of service might lead to more staff cuts. This might explain why Adele was actively searching for jobs, and left the Project a few months after the Time Period 1 interview.

"...So I just see staff levels, when things get where they are hoping to be, I think there will be more staff cuts...We've got temporary expertise, they are not recruiting them, but they've got a huge waiting list as well. So I think realistically a long time, I'm just wondering do they need all the OTs if the OTAs and the caseworkers are gonna be doing the post..."

Adele (OT, Time Period 1)

Adele also found that the newly recruited OTs were on temporary contract, and presumed that OT posts might be cut down eventually, given that the OTAs and CWs were able to do the OT post. Therefore, Adele believed that the purpose of the Project was to speed up customer journey, cut down costs, and get a good value for money.

"...There are changes everywhere; we have to go with it. Otherwise there is (are) agencies out there...there are lots of competition out there. I think it's an opportunity for us as well, to try to work with it, and try to be quick with customers..."

Therefore, Adele had a good understanding of why the Project was being carried out, and was able to identify with the Project to some extent. She argued that the project was to speed up customer journey, to cut down OT posts, and get good value for money. Adele was seen to experience a small disparity between her previous and new roles, contrary to the other OTs.

To sum up, there was less disparity between Adele's work role identity and the work role identity associated with the Project. From the angle of emotion and sensemaking, Adele's emotions towards the anomalies she noticed were either positively valenced emotions, or else mild emotions. She expressed worry towards the anomaly of customer rapport not as good as before and information overload for customers; however, the anomaly was dismissed and was not taken as a sensemaking cue. Adele's prospection was based on the view that OT job would be cut down with people becoming more proficient in carrying out the new role.

5.5. Ambivalent recipient

Leo was recruited as an OT one year after the Project began. His role was to carry out the medical and financial assessment, and oversee the case from start to finish. Leo worked as an OT in another organisation for six months, where he was mainly responsible for the telephone medical assessment. After joining the Project, at first Leo went on a few visits with other colleagues to shadow and learn. Then, gradually the complexity and volume of his cases increased. The interview with Leo was only conducted in Time Period 2, since he was not part of the Project during Time Period 1 interviews. During the one year in the team, Leo noticed the following anomalies: 1) staff leaving and its various affects; 2) financial assessment; 3) the face to face medical assessment; and 4) the incompatible IT systems (Table 5.4).

Leo noticed that the staff left were OTs and OTAs. Staff leaving affected Leo in the following aspects. First of all, only one experienced OT remained in the team due to staff leaving. Thus, as the only other OT, Leo was given complex cases, which he was not very confident about. Leo had a bad experience while dealing with a complex case given to him. He expressed dissatisfaction towards management, and argued that as a new OT, he should not be given

complex cases.

"…So really, the things I said, somebody who is inexperienced shouldn't be given a case like this. But the way things were going, they carried on that way. All the experienced staff left, and you know, that created a problem, you know…"

Leo (OT, Time Period 2)

Table 5. 4. Data coding structure (Leo)

Summaries of quotations	First order analysis	Second order analysis
1. Only one experienced OT and Leo left in the team, difficult for Leo to manage complex cases, which OTs are supposed to be doing (dissatisfaction) 2. The inherited cases from staff left are challenging (dissatisfaction) 3. Taking on face to face medical assessment rather than pure telephone medical assessment prior to the Project 4. The financial assessment is quite challenging 5. The incompatible IT system resulted from different organisation working together	Taking on activities that one values Challenges brought by other members of the organisation indirectly Taking on activities that was not desired	Mixed impact on work role identity (with mild emotions)
People will get more experienced, and the Project will run better	The future development of the Project is based on staff's current ability to carry out the new role	Past-oriented prospection
Sensemaking outcome: The Project is to streamline the service and make it faster. However, he does not approve of how the Project was designed. He believed that people should stick to their specialism and it would be more efficient to separate the roles. Leo accepts some parts of the Project, while disapproving the design of the Project		

Second, Leo inherited several cases from the people left, which he found challenging. According to him, most of the cases inherited had limited work or incorrect recording done; as a result, Leo had to start the case over from the beginning.

"…What I found was, the case was a second hand or third hand case I picked when people

left, you pick them up, they became the hard ones, because there wasn't enough work done on them, or there wasn't enough work recorded. In theory, even though somebody started this thing off, or even got to the point they've plan permission, they did drawings, they did all these, third one down the line, you had to own it like you started it, and these were the challenges I found…"

"…You find a bit that people can be malicious with what they are recording, so they don't record everything, and you end up picking up cases you are in the dark, really, don't know what's going on. In the past, I tended to trust that they are doing the right thing, and then found that because. I've been given a case, somebody has done it, two to three people have done it, you think it is ok, but you find some missing bits. So you don't have ownership of it, really, so in a way, to some extent, it's a learning curve all the way through this, and if I knew now, if I knew what I know now, then it would be a lot better, but I had to learn it the hard way, if you like…"

<div align="right">Leo (OT, Time Period 2)</div>

Leo believed that the main reason for OTs and OTAs leaving was that they wished to remain OT-focused. Also, being an OT made them feel like an expert, whereas adding the caseworker role (doing financial assessment and overseeing the case) challenged their perception of being an expert, since they have not mastered the caseworker skills.

"…But you've (been) given more work other than OT work, you know, admin work, work to do with housing issues, you know, so the workload has increased. So the people who are OTs realize they don't want to do it, so they left, they created more pressure for those who are already here…"

<div align="right">Leo (OT, Time Period 2)</div>

Leo found the financial assessment difficult. He cited the example of a senior caseworker doing the financial assessment, stating that this senior caseworker had to do the financial assessment three times to get the final figure right. However, Leo did not express too much emotion in carrying out the financial assessment.

"...I find it (financial assessment) really tricky, because I've only done a few, it's not my expertise...So it's actually getting that figure right, you know, because it's the thing, what you put in (the computer) is what you get out, isn't it? If you miss something else, it can change the figure wildly..."

Leo (OT, Time Period 2)

Nevertheless, Leo contended that OTs and caseworkers should stick to their own specialism. If people stuck to their own roles, the service would be quicker.

"...I'm an OT, I did not want to be good at (the casework), because I wanted to be an OT. But people that aren't OTs, who are office workers, admin workers, would be good at that. I mean, there are people who are good at communications, typing and using systems, IT, you know, good at IT...so that means all the time that would be managed by the people who are just doing that..."

Leo (OT, Time Period 2)

Similarly, Leo argued that the telephone assessment should be carried out by the same person, so that they could become more efficient in doing this.

"...If I design it (the Project), so you would have at the front of the operation, the desk, the desk, the same people doing that and doing nothing else. So they would be admin workers, there would be two or three of them, bearing in mind, obviously, holidays and stuff like that.

Other people can step in their shoes, and stuff like that, so you have those people doing that (telephone assessment) all the time, they will become very very good at it, and be. They can answer the questions, they would have the sort of, they wouldn't need to know other things, because that's what they would be doing..."

<div align="right">Leo (OT, Time Period 2)</div>

Leo believed that there should be compromises from all participating organisations for the IT system, rather than having two different recording systems. He also argued that the confidentiality issue should be resolved, so that staff from the team could all do the recording and access the same document. Unlike other staff such as Simon (section 6.2), Leo did not accuse middle managers of the problem of the two systems.

"...I think they have to make some compromises here. In order to get everyone on board with this, with the Borough Council here, and the County Council, I think they have to do a bit of compromise, that's why we are having two recording systems..."

"...But there are, along the way, there are lots of things crossing the board, you know, cross boundaries, er, being, you know, attached different systems, being allocated, what's it, confidentiality, and you know, sort of data protection, all these sorts of things, somebody is not allowed to look at things, some people are, you know, created problems along the way..."

<div align="right">Leo (OT, Time Period 2)</div>

The emotions expressed by Leo in noticing the above mentioned anomalies were relatively mild. For example, most of the time Leo was talking about how staff leaving affected him and the advantages of separate roles. Leo also believed that staff would become more experienced in the future, and that the Project would run better.

Leo agreed that the Project was intended to streamline the service, and make it faster. He argued that the Project had improved the service greatly. However, he did not approve of how the Project was designed. He believed that people should stick to their own specialism.

To sum up, Leo's job focused solely on the telephone medical assessment prior to joining the Project. Thus, Leo's work role identity as an OT was not as strong as those who left the organisation. With the Project, his role remit changed to include face to face medical assessment and the caseworker role such as financial assessment and recording on the two systems. Therefore, Leo's role identity increased to some extent, since he was able to carry out some face-to-face medical assessment other than pure telephone medical assessment.

However, some aspects of Leo's work role identity were also adversely affected by the Project. As mentioned earlier, Leo found it challenging to handle some of the cases passed on from the colleagues left, the mishandling of which affected Leo's professionalism and created dissatisfaction. This might explain the decrease in Leo's role identity as an OT. Leo's argument that people should stick to their own role showed that he regarded doing other caseworker role as a decrease in his professionalism.

Nevertheless, Leo was recruited under the Project, and was aware that his role as an OT would include both OT assessment and caseworker role. Therefore, Leo's reaction to the caseworker role and his emotions towards the anomalies noticed were not as strong as the other OTs. Leo disapproved of the design of the Project, and accepted the Project ambivalently. Thus, Leo is categorised as ambivalent recipient. This category also included Edward, who experienced both enhancement and a decrease in his work role identity and ambivalently accepted the Project.

5.6. Summary

This chapter looks at the sensemaking of the OTs and the OTAs by examining how and why particular cues are selected for sensemaking. A few factors such as prospection, work role identity, and emotions are discussed with regard to each individual's sensemaking. The OTs and the OTAs exhibited four different behaviours, these being disengaged actor, elite actor, accepting actor, and ambivalent recipient.

Disengaged actors experience a level of dissonance between their original work role identity and the work role identity associated with the Project. Their sensemaking is focused on a few anomalies and their prospective sensemaking is more future-oriented. They are also challenged by the other members of the organisation, and their autonomy of working is encroached. Staff in this category exhibit negatively valenced emotions and disengage with the Project.

For elite actors, valued qualities in a role are enhanced. They may also gain support from other colleagues and line managers. Staff in the elite actor category experience positively valenced emotions. People in this category are engaged in prospective sensemaking, and their prospective sensemaking is more based on past events, since these events helped people to practice valued attributes in their roles.

There is a small disparity between accepting actor's original work role identity and the work role identity associated with the Project. The small disparity leaves people enough challenge to accomplish the next level of learning. People in this category show positively valenced emotions and express positive views of the Project. Nevertheless, they might have doubts about the Project, as compared to elite actors.

Ambivalent recipients, in contrast, experience both an enhancement and a decrease in their work role identity. They show mild emotions to the anomalies noticed with the Project. They disapprove certain aspects of the Project, and thus, accept the Project ambivalently. The next chapter adopts a similar approach to this chapter, and analyses the sensemaking of the Caseworkers, the Technical Officer, and the Housing Assessment Officers.

Chapter 6 CW, TO, and HAO

6.1. Introduction

The previous chapter analysed the sensemaking of the Occupational Therapist (OT) and the Occupational Therapist Assistant (OTA). This chapter adopts a similar approach to examine the sensemaking of the Case Worker (CW), the Technical Officer (TO), and the Housing Assessment Officer (HAO). There are five CWs (Lydia, Mellissa, Lizzy, Elaine, and Mark), three HAOs (Gillian, Adam, and Jess) and one TO (Simon) in the Project.

All the three HAOs actively participated in carrying out the Project. Similarly, the CW Mark actively participated in the Project. The CW Lizzy and Mellissa accepted the new way of working. However, the CW Elaine and the TO Simon rejected the Project, but stayed in the team and caused trouble. Lydia (CW) showed variation in her sensemaking of the Project across Time Period 1 and Time Period 2 interviews.

The managers of the Project also expressed their views about how staff view the Project. For example, Ashley indicated that Simon (TO) did not acquire the necessary skills to fulfil his role prior to the Project, and therefore, struggle to perform the new role brought by the Project.

"...I think it (the Project) also identified that people in some positions haven't necessarily got the skills to do that job. I question how they performed prior to the Project. Some of the housing staff (Simon) are not necessarily performing, so people are struggling with the new job..."

Ashley (Manager, Time Period 1)

Kevin also noticed that the newly recruited HAOs change the team dynamic of the Project and are active in learning the new role.

"...I think for me it's a breath of fresh air coming through and I think they have changed the dynamic of the team. I think it's been really exciting..."

Kevin (Manager, Time Period 2)

6.2. Reluctant participant

Simon was a technical officer prior to the Project. His role was to visit the customer, decide on the most cost-effective way of putting in the adaptation, and inspect the final work. Simon valued the face-to-face contact with customers, and regarded sitting in the office and doing paperwork as a waste of time. Simon valued the confidence and professionalism he held in doing his job.

"...so the whole point is to go out, for me it's a waste of time to be sitting in the office. I should be there doing inspection. Paperwork should be done by someone else. I should be out doing the inspections, doing the recommendations, that sort of thing, that's what I should be doing..."

Simon (TO, Time Period 1)

With the Project, Simon noticed the following aspects in his new role: 1) Doing the OT role; 2) Training; 3) Being mentored; 4) Not being able to see the final product; 5) Lack of care from management; 6) The way the Project was carried out; 7) Work become more adaptation oriented; 8) OTs doing two systems; 9) Taking the CW role (Table 6.1).

Table 6. 1. Data coding structure (Simon)

Summaries of quotations	First order analysis	Second order analysis
1. Doing the OT role (worry, anxiety) 2. Training (anxiety) 3. Being mentored (dissatisfaction) 4. Not being able to see the final product (dissatisfaction) 5. Lack of care from management (disappointment) 6. The way the Project was carried out (frustration) 7. Work becomes more adaptation oriented (no specific emotion, disengaged) 8. OTs doing two systems (worry) 9. Taking the CW role (dissatisfaction)	Loss of core activities and values Large disparity between the core activities of the new role and the previous role Challenges brought by new colleagues Negatively valenced emotion	Threatened role identity (with negatively valenced emotions)
The new role is too much work for one person and people will burnout in the end.	The future development of the Project is based on the future prospect of the new role	Future-oriented prospection
Sensemaking outcome 1: The Project is to serve the managers rather than being customer focused. The project is to cut down staff level, get master thesis for one middle manager, and secure position for the other middle manager.		
1. Being more proficient in the OT role (relief) 2. Logging of the training courses (dissatisfaction) 3. The way the Project was carried out (dissatisfaction) 4. People on different pay scales (dissatisfaction) 5. Staff leaving (no specific emotion) 6. Taking minutes (dissatisfaction) 7. Keeping paper records (dissatisfaction)	Mastered core activities in the new role Dissatisfaction experienced through role set	Threatened role identity but not as severe as Time Period 1 (with negatively valenced emotions)
The Project entails too much work for one person to deal with, and could only be taken on by energetic youngsters	Focusing on the volume of the work in the Project	Future-oriented prospection
Sensemaking outcome 2: With the Project, the management is trying to get as much done with as little as possible. Simon reluctantly stayed with the Project and complained carrying out his daily activities.		

Simon regarded himself as a professional when he was a technical officer. However, he found that doing medical assessment gave him a sense of unprofessionalism, since he was not confident about the medical assessment. According to Simon, he had never carried out

medical assessment in his previous jobs, and felt awkward when doing a medical assessment. Simon was worried that he did not do the medical assessment correctly.

"...I think people can sense whether you are confident or not in what you are doing, and that worries me because I'm not confident yet in learning the medical side of it, because we are looking at people's medical problems to see whether they are capable to do certain things, and we have to recommend things that can assist them...I don't have enough knowledge of the medical problems, and how that affect people's daily life. So if somebody's got arthritis, I know it makes the joint sore, but how does it affect what they can do. I mean, it's gonna affect them with walking, but are they still going to be able to sit up properly, or whether they can use their arms up or, so it's the medical side worrying me...and it was so worrying, you worry, am I doing the right thing? Looking at it, if it can be altered, if I've done the wrong thing, but it's so stressful when you are in somebody's house..."

Simon (TO, Time Period 1)

Simon found that the training courses provided were very intensive, and he felt anxious to master the courses. He argued that the management was just trying to tick the boxes, so that the management could claim that staff were trained.

"...We went away for a course, a couple of weeks ago, we had to live in, we stayed in two nights. It was intense, that's the word I'm looking for, very intense. You've got everything showed to you in a very short period of time, and we had an exam in the end of that as well...But then you've got so many varying subjects, you've got, you've got an occupational therapists coming in and talk about the body, skeleton, the nerve system, I mean this is all in two hours, and you are expected to learn all about the body and the nerve systems in two hours...So everything was throwing at you, and you have to start at nine o'clock in the

morning and you don't finish until six thirty at night. There was about an eight minute-break in the morning, eight minute-break in the afternoon, and three quarter to an hour for lunch. I mean it was intense, so many different things from legislation to biology to, and the lecturers are different people on different things, and it was just, so about three o'clock in the afternoon, it just switched off..."

"...I mean we had all different people on different courses, and all courses we do, we don't get enough details, because it is too short, too short that they are trying to (tick boxes). It appears that you get a particular box. Yeah, that's done, yeah, that's done, and no one wants to know what's in the box, and just done, done, done, that's how it feels..."

Simon (TO, Time Period 1)

Simon expressed dissatisfaction towards the mentoring that he had to undertake. The mentor was to teach Simon medical and financial assessments. However, according to Simon, his mentor is someone who is younger and who teaches him the job that he has been doing for the past 25 years. The mentoring scheme gave Simon the sense that he did not know how to do his job, which affected Simon's perception of being a professional.

"...Well, I've got stuff I've got to learn, I've got to be mentored, I've been here for 25 years, I've got to go out with somebody who is gonna mentoring me to see if I'm doing the right job or not, and they are a lot younger than me..."

"...I'd much rather having somebody teach me about the bits I don't know rather than through all things again, because I've been doing it for twenty odd years. So I need to, it's the medical side I need to get to grips with, and the actual, cause we are expected to go out and look helping people get extra benefits, if they are not getting the right benefits, helping people

get charity. That's something I don't know how to do before, that's another side I've got to take on board, it's just so much being thrown at you at the same time…"

<div align="right">Simon (TO, Time Period 1)</div>

As mentioned earlier, Simon's previous role allowed him to inspect the final product. However, with the Project, only a few customers were called after the adaptation for feedback. Simon expressed dissatisfaction at not being able to see the final product.

"…We don't see the finished job, which I think, used to be a bonus, a reward to see the benefits people get out of things…After the job, one of the, they have the percent of 30%, they will check to see if the work has done ok, whether they are happy, but we don't actually see that…"

<div align="right">Simon (TO, Time Period 1)</div>

Simon argued that the management did not show enough care to the staff. He was quite disappointed that no one from management cared to ask him how he was after he came back to work from two months sick leave.

"…I don't think the management gave them (the staff) enough credit for that. They (staff) feel as if they (management) are building this empire. They are building this thing, and it's got to succeed, man, because it's gone so far and it's got to succeed at any cost, doesn't matter if the staff are falling over, or getting stressed out…"

"…Not enough care for the staff, they don't seem to care. People have been walking out in tears; the pressure's got to them. Nobody seems to come up and say, are you all right? You know, how are you coping? Nobody seems to care, there is no care…"

<div align="right">Simon (TO, Time Period 1)</div>

Simon was frustrated, and expressed dissatisfaction towards how the Project was carried out. He argued that staff were not prepared, and had been thrown into the Project without a proper plan.

"...Because it's been, instead of, normally, you expect everything to be put into place, the computer system, ok, that's working, we've got this, we've got that, you get training. Then you start, it hasn't been like that. We started with nothing, add everything as it goes along, things have gone wrong, and we have to put it right. We haven't got enough staff, so it's all taken its toll, because everything changes, constant change, constant, something new, oh, we've got this, we've got to do it this way, we've got to do it that way..."

<div align="right">Simon (TO, Time Period 1)</div>

Simon also found that with the Project, the service they provided shifted to being more adaptation focused, whereas before there were other services too. However, Simon did not express a specific emotion towards this anomaly.

"...But I have to say that things did tend to be more to disabled facility side, more than things like the casework, benefits stuff like that, so yeah, it was dominated really by the disabled facility work, not much came up on the, in the line of renovation or problems with the property itself..."

<div align="right">Simon (TO, Time Period 1)</div>

Simon also noticed that the OTs and OTAs had to use two recording systems. He was also worried that he might need to do the two recordings in the future too.

"...But we still have two totally separate systems. We have our systems and assessment, which has to be all done, and the OTs have to do their recording...National health wants their

recording done in a specific way, and local government want their recording done in a specific way, so we have to do everything twice. Now the OTs and OTAs are already doing it, they have to do ours as well, cause we haven't got access to it. So we, once we've got access, we have to do that as well. So it's another thing I'm not looking forward to, because you've got to use all the medical terminology and stuff like that..."

<div align="right">Simon (TO, Time Period 1)</div>

Simon asserted that with his new role in financial assessment and recording, his face-to-face contact with the client decreased. He was dissatisfied with the change in his job.

"*...Now, we are tired up with a lot of paper work, a lot of learning, a lot of courses, a lot of things keep us away from the clients, basically, because we have to sit at the desk, deal with people on the telephone, so it's, yeah, it's cut down the amount of contact we had with clients...*"

<div align="right">Simon (TO, Time Period 1)</div>

Simon expressed negatively valenced emotions such as worry, anxiety, dissatisfaction, frustration and disappointment towards the anomalies he noticed. He engaged with almost all anomalies he noticed in his sensemaking of the Project except work becoming more adaptation oriented. The possible reason for engaging or disengaging the anomalies can be that certain anomalies affect either Simon's core activities or the attributes that he values in his role, such as the frequent contact with customers. Simon was anxious about carrying out medical assessment, and worried that he might prescribe wrong equipment for customers. As I showed earlier, Simon's lack of competency in doing the medical assessment affects his sense of professionalism he values in doing a job.

Simon asserted that the Project had the purpose of serving the managers rather than

customers. His conclusion was that the project was intended to cut down on staffing level, to enable one middle manager to get a master's thesis, and to secure a position for another middle manager. Thus, staff were '*guinea pigs*' for the management and subjects for experiments. Moreover, other slander was uttered against the managers, discrediting him/her taking of the management position in the first place. Simon claimed that only because of nepotism were the managers able to have the position they had now.

The gap between the first and second interview with Simon was one year. After a further one year implementation of the Project, Simon noticed the following anomalies: 1) being more proficient in the OT role; 2) logging of the training courses; 3) the way the Project was carried out; 4) people on different pay scales; 5) people leaving; 6) minutes taking; 7) keeping paper records.

Simon felt relieved that he had mastered some knowledge of the OT assessment and had become more confident in carrying out the assessment.

"…I've got a lot better at that (OT assessment) now, I'm more confident with that now, I know if, if I look and I'm not sure about this, I'm gonna get back to the office and get some advice, if there is something difficult and I know I can't do that…"

Simon (TO, Time Period 2)

Simon was dissatisfied that he had to go back to his calendar and find out all the training courses he took so as to give management an up-to-date record. He complained about how disorganized the Project was.

"…We've got to log on to all the courses we've done, and where we were, what days they

were, and whether we had to do a, what is it you do, a review of the course you've done, can't remember what it's called now. Anyway, you have to put down what's your thoughts on the course, what you've learned, what you, so you've got all that to do now. It's something that should have been done at the beginning, but it's just put on my desk today…"

"…For me, this means I've got to take some of my time to do that now, and I've got to go right back to my calendar, find out what course I went on, when I went on? Did I do this? Did I do that? So that's gonna take a lot of time, and that time I should be doing catching up what I've got to do…"

Simon (TO, Time Period 2)

Simon did not approve of the way the Project was carried out. He talked about the delivery of the Project in a sarcastic way to express dissatisfaction.

"…I don't know whether it's the modern way of doing things that, they do these thing where you set off on something new without having planned it, and then you sort of, any obstacles you come across you are supposed to solve. I don't know whether that's the new way or not, but it's made it very difficult…"

Simon (TO, Time Period 2)

Simon found that the staff who did the same job were on different pay scales. He expressed dissatisfaction towards the unequal treatment, and argued that it is impossible to work as a team under different conditions. Simon also aired his concerns and empathy to Sally regarding the differences in their payment during the consultation meeting.

"…We are supposed to be a team, but we are not a team. We are all different, we are all working (under different conditions). There are different pay scales, there is a different,

you've got people with degree, you've got people with technical experience, you've. All these people are sort of moulded into one, but they are all separate, because some of them are from Greenshire County Council, some are from (different Borough Councils). There are natural barriers, because they do things differently from what we do, we do something different to them...I mean it's ridiculous that I'm on my pay scale, and Sally (OTA) for example is doing the same job as me, and she is on a much lower pay scale, and that's only because she is employed by Greenshire, and I'm employed by the Borough Council. So you can't really be a team if you know what I mean, because there is that natural barrier. If you are all on the same pay, all doing the same thing, then you will be a team, but you are not..."

Simon (TO, Time Period 2)

"...Simon said that as a team, somebody else (the OTAs) is doing the same job, but paid less, and it's not fair. He mentioned this pay inequality, arguing that "you are a team, you don't want to feel strange." "Strange" is very interesting word to use here. To other people, it should be Sally (OTA) who raises this question, because she is the one who is most affected; however, Simon raised the question. It might because Simon feels bad about doing the same job but earning more..."

(Consultation meeting observation)

Simon offered a rational explanation to staff leaving, towards which he expressed no specific emotion. He argued that, first of all, staff were not satisfied with the level of professionalism they perceived with the new role and decreased customer rapport.

"...Along with that change comes the feeling that you are not doing the job as well as you used to do it. You are not as thorough, cause you haven't got the time to spend on it, and that breathes a sense of dissatisfaction. Because you don't think you are doing the job as well as you used to, and you are not being good with the clients. You are not spending as much time

with the clients as you used to, because we only see them once now. So consequently, you don't get a rapport, you used to get a rapport with the client…"

<div align="right">Simon (TO, Time Period 2)</div>

Second, Simon inspected the final product. He asserted that the Project took away job satisfaction, since he couldn't see the actual final product. He argued that the other staff felt the same way.

"…But there's the other thing we don't get now, that's the job satisfaction. We should have seen something done, er, so you don't get that, er, there is also final inspections, go around and do the final inspection and get the client signed off, so you see the client, you've been in more control than you are now about the job itself, and you would see the finished product, so you will get the feedback of the client, er, you get the reward for seeing something done, you don't see that now…"

<div align="right">Simon (TO, Time Period 2)</div>

Third, Simon asserted that with the Project, one person is doing the roles of several people. Thus, staff could not keep up with the high volume of work and left the organisation.

"…Plus, obviously there is more work than it used to be, you do a lot more now, we are doing three four jobs now, cause I was technical, now I'm doing technical, I'm doing the medical assessment, I'm doing the admin work, and then I'm doing all the courses the paper work, and the rest of it that goes with it now, much more paper work that I used to have…"

<div align="right">Simon (TO, Time Period 2)</div>

The Project team held meetings every month, and staff were asked to take turns for minutes taking. Simon complained that there should be an admin support for minutes taking, and his time should not be wasted on minute taking.

"...The ridiculous thing that we have to do now which we shouldn't have to do, like minutes. When we have a meeting we have to take our own minutes, why? My question is why do we have to take our own minutes? We have admin, who used to take minutes. I've never taken minutes in my life...You miss everything that's going on in the meeting, cause you are trying to concentrate on all the bullet points you've got to put down. So you miss, you don't take part in the meeting yourself, which you should be, and you spend a day trying to reproduce the minutes to send them out, half a day, say half a day. So that's another half a day of my time out of my three days..."

Simon (TO, Time Period 2)

Simon found that he had to keep paper records because of the '*over-complicated system*'. Simon expressed dissatisfaction towards the records keeping method that he had to adopt.

"...The over-complicated system we have to work with, it's just so complicated, why? This is the question. Why do we keep paper records? We should not need to keep paper records. We have a computer surely. They can be designed to remind you, to tell you whatever, but no, we keep records, because it's the only way to keep track of what's going on, cause it's so complicated...I mean we don't have to do that if we've got a system that works adequately, but it's so complicated. I don't think you can design a system so complicated, it's ridiculous..."

Simon (TO, Time Period 2)

Simon believed that the Project entailed too much work for one person to deal with, and could only be taken on by energetic youngsters. He argued that in future, young people would get burned out quickly and leave the job.

"...I should think it would be full of very young people. I don't think the old people would

take the stress and the strain, because we've been used to do things in certain ways. Changes are always very difficult, especially when you don't agree with it, but if people are recruited for something, they don't know any difference. So that's the way it will go, it will be very young people, and they will get burned out quite quickly and move on…"

Simon (TO, Time Period 2)

To sum up, Simon experienced a large gap between the activities entailed in his role prior to and after the Project, due to his lack of knowledge related to medical assessment and IT skills. He became more proficient in doing the OT assessment in Time Period 2 and was relived to 'carry out the OT assessment', yet he had not fully identified with the work role identity associated with the Project. Throughout Time Period 1 and Time Period 2, most of the anomalies elicited moderately strong emotions like worry, anxiety, and frustration. The anomalies that neither affected Simon's role identity, nor elicited specific emotions, were not selected for his sensemaking process such as the new service being more adaptation oriented.

Simon's sensemaking about the future was narrowly focused in both Time Period 1 and Time Period 2. Thus, although Simon stayed in the team, he complained a lot about daily activities compared to other staff in the team. These complaints were reflected in his emotions of the anomalies noticed as well. For example, Simon expressed more complaints and dissatisfaction with anomalies such as logging on to all the training courses, keeping records of the telephone assessments, and minute taking. Moreover, Simon insulted the middle managers and expressed sarcasm in talking about the delivery of the Project in the interviews and during informal meetings such as the Christmas lunch gathering. Thus, Simon believed that with the Project, the management was trying to get as much done with as little as possible. He argued that the ideal way of working should be people sticking to their own specialties.

"...Simon refused to do minutes taking in the staff meeting and argued that, "there should be some support for minutes taking. There should be somebody there to take the minutes. Why do we have to take turns to do it? Why does anybody here have to do it? Why do I have to keep asking questions?..."

(Staff meeting observation 4)

As a caseworker, Elaine's main task was to carry out housing related services concerning adaptation, home safety, loans and repairs. There was a low disparity between Elaine's new role brought by the Project and her old role, mainly because some of the medical assessment knowledge required in the new role was covered in Elaine's previous role of home safety, as with other caseworkers. Nevertheless, Elaine had a much more negative view and reaction to the Project.

At the beginning, Elaine was involved in the Project for a short time, and she was then assigned to other housing related tasks. However, Elaine came to the Project when the OT and OTA who were working with her left. Thus, the interview with Elaine was carried out during Time Period 2, when she was more involved in the Project. Elaine noticed more negative anomalies and exaggerated some of the anomalies in making sense of them: 1) lack of training; 2) too many managers; 3) explaining the service to customers on the phone; 4) doing the OT assessment; 5) staff leaving; 6) the services provided are less than prior to the Project (Table 6.2).

Elaine argued that the lack of training affected her ability to deal with the medical assessment. She was worried that she could not perform the job sufficiently.

"...What I dislike is feeling out of my, I mean, I don't feel way out of depth, but I would like a

little bit more, I would like more shadowing at the beginning, so that. Somebody said to me the other day, for instance, or I can't get on this toilet seat, I can't, she said I can't get on with it, she said it needs to be higher, so I said, ok, did I know how to check? I was like, you know, you feel such an idiot, you are there as the expert, and you don't know how that toilet seat works, and you are telling them they need one, I think that's poor, I think I need to know how that toilet seat works without a shadow of doubt, or before I'm allowed even to say, yes, we will get you a toilet seat, that's my opinion, I think that's poor, and I think that's somebody hasn't had enough training actually…"

Elaine (CW, Time Period 2)

Table 6. 2. Data coding structure (Elaine)

Summaries of quotations	First order analysis	Second order analysis
1. Lack of training (worry, frustration) 2. Too many managers (anxiety, exaggeration) 3. Explaining the service to customers on the phone (frustration) 4. Doing the OT assessment (worry, anxiety, frustration) 5. Staff leaving (dissatisfaction and disappointment) 6. The services provided are less than prior to the Project (dissatisfaction)	Taking on activities that was not in one's original role and one was not confident about Challenges brought by other members of the organisation Negatively valenced emotion	Threatened role identity (with negatively valenced emotions)
The Project might either fail to provide a quicker service to customers, or be taken out in the future	The prospection is based on Elaine's ability to master the role in the future	Future-oriented prospection
Sensemaking outcome: the Project is not thought through and not well delivered. The Project is not better for customers		

Elaine asserted that she needed more training apart from the four weeks' learning and shadowing from the OT and the OTA. Elaine was frustrated that she was thrown into the new service without enough shadowing and training.

"…I go and assess bed rails to check they are not wobbly, I don't really know how they

should be fitted but I go and check the bed. Er, just about everything, really, whether I feel is enough shadowing done, I really don't feel, if I'm perfectly honest, up to the job. I don't, I just think four weeks' visit, even if it is two per day. How on earth am I supposed to really have any in-depth knowledge, to me, that's not enough, and I think in five years' time, if I'm still here, and I look back at me today, I would be, bloody hell, I know nothing, and I think I really will think that. What happens, how far do we go? We wait until somebody gets strangled on the bedrail, then we say, actually, Elaine could have done with a bit more training…"

Elaine (CW, Time Period 2)

According to Elaine, there were too many managers from different organizations giving different orders to her, and she was anxious about whose order to follow. However, there was some exaggeration in Elaine's accounts. Some of the managers mentioned in Elaine's accounts are not actually working for the Project such as Miranda and Cathy; therefore, they would not advise Elaine on how to do things in the Project.

"…I've got that many bosses I don't know what to do, I've got Miranda, I've got Kate, they were originally two of my bosses, I've Cathy, who is my line manager, who I answer to, I've got a guy from Council, I have got Lydia, and her boss Edward, and everyone else who wants to and tell me no, we are not doing it like that, things change on a daily basis, one day we are doing it this way, one day we are not doing it that way, that person says no, no, you can't do it like that, cause of this. It's awful, I'm not sure what you want me to do really, it really is awful…"

Elaine (CW, Time Period 2)

Elaine expressed frustration in explaining the service to customers over the phone.

"…Oh, it's awful, people ring up and say, are you Grey Council? And you sort of say, yeah,

we are Grey Council. You are Grey Council? Grey Council who? Grey Council the social landlord department. So you are Grey Council care and repair? Yeah, Grey Council care and repair. When you answer the phone you said you are housing assessment officer, yeah, we are…that's just ridiculous, that happens a couple of times a day when people say who are you, because you literally putting your hats on…"

<div align="right">Elaine (CW, Time Period 2)</div>

Elaine was worried and anxious about doing the medical assessment, as she claimed that she was not a nurse and had no medical knowledge. Elaine expressed frustration in doing the medical assessment, and argued that she lacked knowledge and experience in noting the customer's conditions.

"…I'm not a nurse. I worked in a shop. I've worked in a call centre. I've got no medical training whatsoever, and I'm guessing what's gonna happen to you, and what's good for you, how on earth do I know, you know, we are sent off and told, you get a bit worse, sometimes you get a bit better, you don't, this can happen, that can happen…"

"…I don't know what they are telling me about, whatever it was called, I think that's something with his spine. I don't know. I know what arthritis is. I know what a headache is. I've got, I need to see the opticians, (be)cause my eyes hurt. Or you know, but when they start saying big long words, I haven't got a clue what it is, try not to look stupid, I say I will note it down, then go back to the occupational therapist…"

"…If it's like that, what's it called, xxx, something to do with that, it is to do with the bowel, or, er, I will try to find out a little bit beforehand. When I went out with Mary, oh, I've got so and so, she would say are you having stereo injections to those, right? Haven't you? I don't

know what to say, I will just go and right, spell as best as you can, and then I have to look into dictionary, D-E xxx (Elaine spell), and I haven't got a clue, if you are stereo injection or not, are they planning to operate? I haven't got a clue…"

<div align="right">Elaine (CW, Time Period 2)</div>

Elaine commented that the Project was not able to retain staff, because people were on different pay scales and contracts despite doing the same job. Elaine was dissatisfied that staff were being treated differently.

"…They can't keep the staff, they just can't…Nothing is compatible, nothing is the same…Nothing gets better. Nobody seems to be listening, and nothing is compatible. Nobody gets treated the same, as far as nobody's treated the same, nobody's terms and conditions are the same…"

<div align="right">Elaine (CW, Time Period 2)</div>

Elaine found that the Project did not include all the services they provided prior to the Project such as the handy person and home safety scheme. She also expressed dissatisfaction at not having enough time to provide other services that she used to provide for customers.

"…What is making me uncertain is whilst we are not really fulfilling Caseworker's role, being a proper home improvement agency, which is where we were, this has never took us anywhere near…that frees me and Lizzy (CW) some time to be able to, yes, we can do a home safety, yes, of course we can spend the day asking him and doing his paperwork and sort him out. Yeah, what about the loans…We are supposed to go out and do a certain amount of networking, which is basically going out into the community and work with voluntary organizations, that sort of thing, saying don't forget us, you know, if you come against a client, and they are struggling, remember us, it's good, cause you know what's out there…"

As I have stated, all the anomalies elicited negatively valenced emotions such as worry, frustration, anxiety, and dissatisfaction, and were taken as sensemaking cues. The happenings to Elaine's role set, i.e., the turnover of most OTs and OTAs, affected how Elaine makes sense of the Project. Moreover, Elaine's perception of managers' actions also affected her sensemaking. She argued that the Project Board should have thought through the project and brought in an outside manager to create one new system for the Project rather than doing the Project in a cheap way.

"…I feel the Project Board do not understand or even have a hint of what's going on the ground. This is too much a big mistake. If from the beginning, they have a project manager came in and said, ok, you've got County Council system, you've got Borough Council system, not compatible, and we need a new system. But nobody wants to spend a penny…"

Elaine (CW, Time Period 2)

Elaine believed that in the future, the Project might either fail to provide a quicker service to customers, or be taken out completely. Elaine's prospective sensemaking was more pessimistic and narrowly focused, which might be based on her presumption of how well she could master the new role in the future.

"…Nothing would have changed. But I see the waiting list growing and growing, until the end, people are gonna wait for 12 months, the same as they (customers) waited before the Project came out. Or we might not be here in 12 months' time, like I said, we are all for tender, er, I don't know..."

Elaine (CW, Time Period 2)

To conclude, there was little disparity between Elaine's old role identity and the role identity associated with the Project. Contrary to other staff that have a low disparity between the two

role identities such as Lizzy, Mellissa, and Mark, Elaine expressed negative views about the Project and claimed that "*the whole system is a monster*".

6.3. Accepting actor

Lizzy and Melissa were caseworkers for the Project. The interview with Melissa was carried out only in Time Period 1 because of maternity leave. In the Time Period 1 interview, Lizzy and Melissa exhibited similar sensemaking patterns. They welcomed the changes to their roles, and accepted the Project. However, Lizzy showed different sensemaking pattern in the Time Period 2 interview. The main reason for this might be the influence that Lizzy's role set exerted. Due to space limits, the following section only focuses on Lizzy's sensemaking across Time Period 1 and Time Period 2.

The interview with Lizzy in Time Period 1 was carried out earlier than those with the rest of the staff. At the time of the interview, Lizzy was still shadowing the OT and the OTA to learn the OT assessment. Lizzy noticed two main happenings: 1) CW learning the medical assessment; 2) OT and OTA taking on the CW role (Table 6.3).

According to Lizzy, her role prior to the Project covered home and safety checks, which provided basic knowledge for the medical assessment required by the Project. The existing knowledge of Lizzy enabled her to recognise people that may need medical assessment.

"…We did the home safety check. We referred our people to the OTs, because we think they are struggling, they might need a stair lift, we used to look into that level (of work) and send them on (to OTs and OTAs)…so we were not officially making the assessments, kind of underlying what we did…"

Table 6. 3. Data coding structure (Lizzy)

Summaries of quotations	First order analysis	Second order analysis
1. Taking on OT assessment 2. OT and OTA taking on CW role	Small disparity between the original role and current role Negotiating one's work role identity New colleagues being challenging	Maintained and protected role identity (with mild emotions)
The roles of OTA and CW will emerge in a year's time and people will be able to carry out the new role	The future development of the Project based on Lizzy's ability to carry out the role	Past-oriented prospection
Sensemaking outcome 1: Lizzy asserted that the Project was to provide a quicker service to the customers and she believed that the OTs viewed the Project as a tool for their managers' personal benefits.		
1. Carrying out the new role (mild emotion) 2. IT system being slow and ineffective (worry) 3. No OT support (frustration) 4. Issues raised in the Project were dealt with by the management in a slow pace (disappointment)	Continuity of core values and activities Unsupportive role set (including OT and management)	Mixed impact on role identity negatively valenced emotions
"…I've no idea, I've no idea where we would go with it (the Project)…not an awful lot (will change)…"	Disengaged in discussing what might happen in the future	Not engaged in prospective sensemaking
Sensemaking outcome 2: Lizzy conclude that the Project is not well organised and structured. She comments that the constant changes in the Project make it difficult to learn and manage.		

Lizzy emphasised her skills in doing a home and safety check, which was to protect her work role identity as a CW.

"…It is, as our professional capacity, we wouldn't be allowed to go to a property, and ignore something we see as dangerous, we are doing home and safety with half of the Council…"

Lizzy (CW, Time Period 1)

"…During today's staff meeting, Lizzy constantly referred to the importance of home safety issues, and asserted that home safety is important for every visit…"

(Staff meeting observation 2)

Lizzy also asserted that the services given by OTs and OTAs prior to the Project did not provide holistic care to customers, which she regarded as more important. Lizzy believed that the CW role is a lot to learn. This comparison with OTs and OTAs also gave Lizzy a sense of distinctiveness, and was used to protect Lizzy's work role identity as a CW.

"…They (OTs and OTAs) have a quite narrow job to do. It's not as holistic as our service is, because we have to do quite a lot of different things to provide our service. We have to know benefits. We have to look at safety issues within the home. We look at fire hazards, condition of the home, all sorts of things, a bit like social workers. We are looking at the general condition of that person at their home, not just the disabled adaptation…"

Lizzy (CW, Time Period 1)

Lizzy found that the OT and the OTA were protective against their jobs. She felt like the personal assistant to the OT, since she was asked to watch and learn how to do OT assessment, but not to practice. This is also evident from Lizzy's interactions with the OT observed during and after the staff meeting.

"…The OT and OTA were a bit like, we go in, they wanted us to watch and learn, but when it comes to express what we can do (within our power as a CW to provide something for the client), they were like, no, the clients were not interested in that. I feel a bit like the PA, just there to watch, and not to do anything…People protecting their jobs, locking at homes a bit. It is not meant to be that. I also felt that [Victoria, OT] in particular is creating a barrier…"

Lizzy (CW, Time Period 1)

"…During the meeting, the OT Victoria invited me for a home visit that she and Lizzy would go in the afternoon. I agreed to go on a visit with Victoria and Lizzy, and thus, hanged around the office for the day. However, later on Lizzy said that she would not go for the joint visit in

the afternoon, since she was very busy with other work. Lizzy's refusal of the agreed visit might be that she didn't like the way Victoria works during joint visit (taking her as personal assistant as Lizzy claimed), especially in front of an outsider…"

<div align="right">(Staff meeting observation 3)</div>

Lizzy was quite happy to learn and do the OT assessment, which according to her, was a level up compared to her skills in home and safety check.

"…It's (medical assessment) quite interesting! I've learned more about this incremental approach, about trying the equipment. You first try to offer one person (a certain type of equipment), and gradually scale up. I think that's been quite interesting…"

<div align="right">Lizzy (CW, Time Period 1)</div>

Lizzy mentioned that she was involved in designing the Project, and was aware that the Project would be carried out.

"…When they designed the Project, they had a steering group basically. So they had a team of professionals and managers to device how to streamline the services, and I was asked to put my input on what a caseworker role is in the process now…"

<div align="right">Lizzy (CW, Time Period 1)</div>

Lizzy believed that the CW role would emerge with the OTA role, and people would be able to carry out the new role in the future. Lizzy's prediction about the future was based on her assumption that she was able to master the new role. This anomaly was used as a cue for sensemaking regarding the future of the Project. Thus, Lizzy's prospective sensemaking in Time Period 1 is past-oriented.

"…It's gonna be growing and changing, isn't it? That's what's gonna happen. Our roles will

emerge with the OTA, and who knows, in five years' time, it might not be as recognizable as it is now. But you've gonna have to go along with that. You know, whatever that flow is, as workers, we have no option but to go along with it…"

<div align="right">Lizzy (CW, Time Period 1)</div>

Lizzy asserted that the Project was to provide a quicker service to the customers and she believed that the OTs viewed the Project as a cynical project for their managers' personal benefits.

"…It was devising steering board, basically to look at reducing (the backlog) and streamlining the service, that's why the Project was born…I think it's streaming line services basically, but tell you what the OTs think about that if you are interested. She thinks her manager, her manager's manager is doing her masters, and she has to devise a project, and this is what it is about. Now she's devised the project, she can pass her masters work. That's how Victoria understands what it was…"

<div align="right">Lizzy (CW, Time Period 1)</div>

To sum up, not all the anomalies brought by the Project in Time Period 1 elicited high level of uncertainty for Lizzy, and she exhibited mild emotions to the anomalies noticed. Like Laura in Time Period 2, the cues noticed and selected for sensemaking were more inclusive. Moreover, Lizzy's prediction about the future was based on her assumption that she was able to master the new role, and her prospective sensemaking was past-oriented. This anomaly was used as a cue for the sensemaking of the future of the Project. Thus, Lizzy accepted the Project and the new way of working.

In Time Period 2, Lizzy became even more proficient in her new role. She was fine with the new role, and had taken HAO role as her everyday activities.

"...I'm ok to go on my own, unless it's complex case. Sometimes backup would be welcome, but most of the time it's ok (to do the HAO role)..."

<div align="right">Lizzy (CW, Time Period 2)</div>

Lizzy was worried to find the current IT system ineffective, claiming that a new and better system should be adopted by the Project.

"...It (the IT system) is working slowly, but it can be more effective than it is probably. I think we need a better system than the spread sheet (the system adopted by the Project), really clever spread sheet. Mark is very clever in designing that, but I think it needs to be backed up with a proper system, not just Mark, who is on holiday, off sick, it is crazy not having a proper system...we need a proper IT system in place, this (the IT system adopted by the Project) is a very unprofessional way to deliver the service, very basic primitive way to deliver it..."

<div align="right">Lizzy (CW, Time Period 2)</div>

At the time of the Time Period 2 interview, the OT and OTA working with Lizzy just left the organisation. Lizzy was frustrated to find that there was no OT support for her.

"...This week there has been thirteen cases just put through. You've got your assessments booked in, and you've got OT's cases. We were supposed to be doing the roles of an OTA, and suddenly they (the thirteen cases) were reassessed and nine of the OT's cases are suitable for two inexperienced HAOs to go and visit, without an OT sitting here. I'm prepared to take on the HAO role, I'm prepared to do what I can do, but just a bit of support, and the form of an OT being here..."

<div align="right">Lizzy (CW, Time Period 2)</div>

Lizzy was slightly disappointed that the management sometimes disregarded the issues raised by staff in the Project, and sometimes they dealt with the issues at a very slow pace.

"…We (staff) do bring issues, and things change very slowly if at all. Things would just have to do that way, whether you like it or not. Sometimes I think it might get changed a little bit, but no, it tends to be at certain pace. So whether we are happy or not, that's how it is…"

<div align="right">Lizzy (CW, Time Period 2)</div>

The factor that affected Lizzy's sensemaking about the Project in Time Period 2 was mainly the turnover of the OT and the OTA. Interestingly, Lizzy disengaged in making sense of what might happen to the Project in a year's time. A possible reason might be that Lizzy was experiencing a sensebreaking while predicting about the future of the project, since her current work role identity was greatly affected.

"…I've no idea, I've no idea where we would go with it (the Project)…not an awful lot (will change), and the stuff (Project) is still going. So presumably if this is still in existence, we will still be going out doing an assessment. If they scrap it, I don't know what they will do. I don't think they will scrap the process…"

<div align="right">Lizzy (CW, Time Period 2)</div>

Lizzy concluded that the Project was not well organised and structured. She commented that the constant changes in the Project made it difficult to learn and manage.

"…They (the management) changed their minds a lot to try to make it (the Project) fit. So it's not easy to teach somebody this job, cause it might change. There are different workarounds to make the system work…It's chaos. It's badly organized. It's not structured. It's a new project, and things are changing…"

Although Lizzy was more proficient in carrying out the new role in Time Period 1, she developed a negative view of the Project. The anomalies noticed in Time Period 2 elicited negatively valenced emotions for Lizzy. Like the disengaged actor Helen, the cues noticed and selected for sensemaking were more exclusive and focusing on the ones that elicited negatively valenced emotions. Moreover, Lizzy disengaged in making sense of what might happen to the Project in the future.

6.4. Active participant

People from this category were the newly recruited Housing Assessment Officer including Gillian, Adam, and Jess, and the CW Mark. They exhibit similar patterns of sensemaking; thus, for simplicity and to avoid redundancy, this section takes Adam as an example to illustrate the sensemaking of active participants, the accounts of other active participants are included when necessary. The interview with Adam was only carried out during the Time Period 2 interviews, since Adam joined the Project 9 months before the Time Period 2 interviews.

According to Adam, his role was to conduct telephone medical assessment, visit people in their own homes, and do face to face medical and financial assessment for them. Upon joining the Project team, he noticed the following anomalies: 1) visiting customers; 2) training every week; 3) telephone medical assessment; 4) doing face to face medical assessment; 5) financial assessment; and 6) staff leaving (Table 6.4).

Adam was quite satisfied and pleased with the HAO role, since he could visit customers and carry out some hands-on jobs. The HAO role elevated Adam's role identity as a call centre operator to an occupational therapist without qualification.

"…I find it (the HAO role) satisfying because it's hands on, I feel it's quite hands on, er, and dealing with people, and I feel there is a payoff. You get to see outcomes, rather than perhaps just a cog somewhere in the chain…When people ask me what job do I do, the way I say it, I'm an occupational therapist who doesn't have qualifications, because the way in that office, effectively that's what we do, we do the same job, but just at a different level…"

Adam (HAO, Time Period 2)

Table 6. 4. Data coding structure (Adam)

Summaries of quotations	First order analysis	Second order analysis
1. Visiting customers (satisfaction and pleased) 2. Training every week (satisfaction and pleased) 3. Telephone assessment (no specific emotion) 4. Doing medical assessment (no specific emotion) 5. Financial assessment (no strong emotion, a bit worry) 6. Staff leaving (no specific emotion)	Taking on activities that were not once in one's role, but aspire to include Support from the management Positively valenced emotions	Enhanced role identity (with positively valenced emotions)
People will get more experienced and be quicker in carrying out the new role	The future development of the Project is based on Adam's ability to carry out the role	Past-oriented prospection
Sensemaking outcome: the Project puts the customers at the centre of the service		

Adam believed that the weekly training course was a sign of management's good will to invest in the staff, and he was quite happy and satisfied that the management was spending time and money on staff training and a competency framework.

"…If you prescribe a wrong piece of equipment, it could be, you know, very dangerous, so they are investing quite a bit of time ensuring that we are competent doing that, so it's good. I like the fact that they are doing that, because I, it gives me faith that their best interest is for the customer, because, you know. I'm sure if I'm working in a shop selling mobility, I will be trained within a month or less than that, we will be training for two weeks, I'm sure, out there

selling equipment to people, whereas this is not, it's not sales, it's about the absolute best interest of the customer…"

<div align="right">Adam (HAO, Time Period 2)</div>

Adam stayed on the duty desk at the beginning to carry out the telephone medical assessment. He found the telephone assessment manageable, since he had worked as a call center operator previously for a few years and was used to help people on the telephone.

"…So it's basically answering phones calls and conducting assessments. In my last job I did very similar thing. It was a different environment, because I was in a customer service center, but I was dealing with very similar things. The idea of speaking to people on the phone, getting information from them, filling in forms, you know, to try to identity needs for them, so in terms of that side of things, it wasn't difficult for me, cause I've been doing that sort of things for years…I felt confident to speak to people about health problems and things like that, and sort of give people advise…"

<div align="right">Adam (HAO, Time Period 2)</div>

Adam stated that he had experience in helping people with health problems, and therefore, the medical assessment in the HAO role was part of his role identity. Adam expressed no specific strong emotions towards medical assessment.

"…In terms of in my old job, I liked to speak to people, I felt confident to speak to people about health problems and things like that, and sort of give people advise, so effectively any job in that role, any job in that sort of area, which pays me money to live, I would have taken…"

<div align="right">Adam (HAO, Time Period 2)</div>

Adam contended that financial assessments were quite difficult to carry out, because of the

resentment some customers have against others who are on benefits. However, Adam found a solution to tackle this problem, namely to explain the rationale for carrying out the financial assessment and the rules he had to follow.

Adam also noticed the staff leaving. He argued that customers' expectations were higher now than before, and thus, the staff were under pressure to perform.

"...I perceive expectations today as being different from your employers, and from the customers, the customers expect you can answer everything, people expects now, not next week when you look into the files, so there is a lot more pressure on nowadays..."

<div align="right">Adam (HAO, Time Period 2)</div>

Adam was pleased to visit customers and with the training he received. Not all the anomalies noticed were taken as sensemaking cues. For example, the cue taking telephone assessment was deselected at the sensemaking process, since taking telephone assessment did not affect Adam's work role identity, nor elicit strong emotions from him. Moreover, Adam did not take financial assessment as sensemaking cue, because the financial assessment was not difficult enough to elicit Adam's emotions, combined with the coping strategies. Also, Adam did not show strong emotions about medical assessment and staff leaving. Only two out of six anomalies were taken as sensemaking cues.

Adam also commented that in the future, people would become more proficient in carrying out the role, and the Project would be successful in helping customers with their housing adaptation needs. Adam's prospective senemaking about the Project reaffirmed that the Project was created with customers at the centre. Adam's prospective sensemaking about the Project was thus to reconstruct history and support his current sensemaking outcome.

"...Well, what will happen is that we will all still have the same people working here now, and because everybody is fully trained, everybody knows what they are doing, hopefully we will have shorter waiting list, things will get done quicker, and people will be less stressed..."

<div align="right">Adam (HAO, Time Period 2)</div>

Adam believed that the happenings around the office actually impeded the work, rather than the multi-skilling nature of the Project.

"...I don't think there is anything necessarily wrong with the process, I think it's resources and external factors, computers not working, people being off sick, people being stressed, not being able to work as you want, not being able to, feeling as though you are not being able to do your job, because of other things happened around you..."

<div align="right">Adam (HAO, Time Period 2)</div>

He also trusted the genuine intention of middle managers to provide a customer-centred service, unlike other staff such as Simon, who insulted managers and was sarcastic towards the delivery of the Project (Section 6.2).

"...The way [a middle manager] comes across to me is somebody genuinely believes that he can make a difference, he not only just sat there taking his pay check, doing what he has to, so I do believe that's (the Project) the aspiration..."

<div align="right">Adam (HAO, Time Period 2)</div>

The influence of middle managers' sensegiving to the newly recruited staff also reflected on Jess, who argued that the service time under the Project is much shorter than previously.

"...when I first started here, I remember [middle manager] saying, this was how it used to be, he's got all the diagrams up there. Er, I don't if he still got them there actually. He had his

diagrams up, and saying this is how the process was before we started the Project, and this is the process now. It's a lot shorter, time-scale wise, so that's positive…"

<div align="right">Jess (HAO, Time Period 2)</div>

Adam believed that the Project was created to streamline the service with customers at the centre.

"…I have the impression that the aspiration is high, they want, they want to help people, they want to try and improve people's health and wellbeing…"

"…Ultimately it's the benefit of the customer, because you can get it done quickly, that's great for the customer, quick, simple done…So I think that's what they are trying to do, to speed things up for the benefit of all (customer and the organisation)…"

<div align="right">Adam (HAO, Time Period 2)</div>

To conclude, work role identity associated with the new role brought by the Project, occupational therapist without qualification, is an elevation of Adam's previous work role identity as a call centre operator. Adam identified with the role brought by the Project, i.e., carrying out telephone medical assessment, face to face medical assessment, and financial assessment. Moreover, Adam expressed either positively valenced emotions such as satisfaction or content or mild emotions towards the anomalies he noticed with the Project. Adam's prospective sensemaking about the future of the Project reassured him that the Project was created for customers and managers aimed to provide a better service to customers.

As with Adam and other newly recruited HAOs, Mark actively participated in the Project. However, unlike the newly recruited HAOs in this category, Mark was a CW. I will briefly

mention Mark's sensemaking of the Project to illustrate why Mark is categorised as an active participant. Mark was a CW, whose main responsibilities were to do the financial assessment and oversee services such as adaptation, housing repair and home safety for customers. Mark worked for an IT position for a number of years prior to his role as a caseworker. He valued the people-focused approach in the Case Worker role. With the Project, Mark was required to carry out telephone medical assessments, face-to-face medical assessments, and develop IT system for the Project, and other CW roles.

Mark took on the medical assessment quite confidently. According to him, his previous role in home safety helped him to accomplish the medical assessment. Because of his IT skills, Mark was appointed to develop the IT system for the Project while carrying out his daily jobs.

Mark exhibited positively valenced emotions such as enjoyment and mild emotions towards certain anomalies he noticed when the Project was implemented.

"…It's (the new role assigned by the Project) apparently different from Case Worker, but from my experiences from my previous roles before I even come to the council, I'm always involved in meetings with customers, discussing requirements, specifications. So it's not completely unfamiliar to me, I could draw on that experience to help me with this role. It's quite interesting. I'm enjoying it…"

Mark (CW, Time Period 1)

Mark was also influenced by middle managers. He noticed that managers were trying to solve the obstacles staff encounter in carrying out their jobs rather then not caring, as some staff such as Simon and Elaine stated.

"...[Middle managers] have got a meeting with people from County for IT issues next week, next Tuesday. So those things are moving forward, things were happening, but that (the IT issue) wasn't necessarily anybody's fault. It's just how things are with this type of project, to get these things sorted out, they need to be sorted out at a high level (rather than middle management level)..."

<div align="right">Mark (CW, Time Period 1)</div>

Similarly, Mark was involved in predicting the future. He argued that the staff would be able to work on their own in a year's time, and carry out their roles confidently. Mark's prospective sensemaking is based on the observation that people could carry out their new role competently, and thus, is past-oriented.

"...I would hope in 12 months, all housing assessment officers are working individually on their own from a visiting point of view...hopefully there will be continuous training in place, which I'm sure there will be, to keep our skills up do date. In twelve months, we would be working, I would hope, as we need to be, and the major issues we've got at the moment are at least mitigated to the point that it (the two recording systems) has a much smaller effect on a day to day work..."

Mark looked forward to the realisation of a countywide service, believing in a countywide service, and argued that all the resources could be put to better use under one system.

"...I hope that in about a year's time, we have some results from the South (Green Borough Council and Black Borough Council), and we've got something in place to make is a County wide service. I know that's where we are aiming, to make it a countywide service. So I would hope in 12 months' time, we are moving towards that..."

Mark believed that the Project provided a quicker and better service to the customer, whereas the old system was costly to run, and did not serve the customer.

"…The old system has grown out a number of years, and actually evolved into something which was not really serving the customer; it was serving the other systems, and the reports and management tools…the whole project is about providing a more customer focused service to make the customer feel that they are at the centre of what we are trying to do…"

Mark (CW, Time Period 1)

With the Project, Mark's role changed in several aspects. First of all, Mark's role identity as a caseworker dealing with some home safety issues was enhanced by taking on the OT assessment, which was a level up from home safety issues. Second, Mark was rebranded as an IT expert in the Project team, where he could utilise both his IT skills and caseworker skills, both are valued by Mark. His IT skills were valued by his role set, both the team members and the management. He showed positively valenced and mild emotions towards the Project. Like Adam, Mark's sensemaking was affected by the happenings in the organisation and middle managers. Mark was also involved in prospective sensemaking, which were constructed positively and reassured him that the Project was to provide a better service for the customers.

6.5. Ambivalent recipient

Ambivalent recipient includes Lydia and Lizzy. Lydia disengaged in the Project in Time Period 1, but became the ambivalent recipient in Time Period 2. Lydia was the senior caseworker and the line manager prior to the Project.

Lydia valued customer rapport, relationship building, and a holistic care for customers. She enjoyed looking for additional funding for customers from various sources, seeking solutions

to people's financial problems, and looking at the holistic needs of the person. With the Project, in Time Period 1 Lydia noticed that: 1) service become more adaptation focused; 2) doing medical assessment; 3) uncertainty of the team leader post; 4) information overload for customers; 5) the two recording system (Table 6.5).

Table 6. 5. Data coding structure (Lydia)

Summaries of quotations	First order analysis	Second order analysis
1. Service become more adaptation focused (worry) 2. Doing medical assessment (frustration) 3. Uncertainty of the team leader post (frustration) 4. Information overload for customers (worry) 5. The two recording system for OT and OTA (worry)	Large disparity between the core activities of the new role and the previous role Challenges experienced by other immediate colleagues	Threatened role identity (with negatively valenced emotions)
…I've no idea, I might find another job, I don't know what might happen…	Disengaged in making sense of what might happen in the future	No prospective sensemaking
Sensemaking outcome 1: the Project provides a streamlined but less quality service. Tried to look for other jobs, but was unsuccessful.		
1. Back to line manager post (enjoyment) 2. Staff leaving (frustration) 3. HAO becoming more competent doing the job (relief) 4. New staff joining (pleased) 5. Service becoming more adaptation focused (worry, a less extent) 6. Service settling down gradually (pleased) 7. Telephone assessment (worry) 8. Information overload for customers (worry)	Valued core activities regained in the new role Challenges experienced by other immediate colleagues	Mixed impact on role identity
In the future, people will become more experienced and proficient, fewer OTs will be needed	Successful Project in the future	Past-oriented prospection
Sensemaking outcome 2: Some parts of the Project are good, some not good for the customers. The Project could be successful, but needs some improvements		

Lydia found that in her previous CW role, staff could spend more time and build a better relationship with customers, so that the difficulties that customers face could be detected.

According to Lydia, the new process was streamlined and staff did not have enough time to build up relationships and ask customers more detailed questions, which might contain vital information to provide a better service to the customers. Therefore, Lydia was worried that the service provided through the Project would become more adaptation focused, and customers would get fewer quality services with the Project.

"...In my role before, if I've gone out to see somebody, I make sure I make time to see and casework. They got a more quality service previously, if I'm honest. We have the time to spend with them and build up that relationship with somebody. But now this process is very streamlined...I just feel that if you are under pressure to get an adaptation, because you've got 50, 60 people on the waiting list. The intention is that things like this (helping people get funding from some charities they are associated with) will be missed..."

"...Because for some people, housing, adapting the property is not just the outside, it's giving different options and letting them think about things. Some people, it might be considered for them to move to shelter accommodation, because they might be socially isolated. That's what worried me about the Project, that we are only focused on doing adaptations, not looking at the bigger picture..."

Lydia (CW, Time Period 1)

Lydia frowned upon the idea of carrying out a medical assessment. She contended that she would never have taken a medical related job in the first place, which was not what she wanted to do. Lydia resented doing the medical assessment and felt frustrated by the fact that she had to do a job that she disliked.

"...I don't like that side of the job. I've always enjoyed, it sounds contradictory, I've always

enjoyed helping people. But the thought of assessing people getting on and off the toilet, getting in and out of bath, doing all those personal, independent things, all leaves me cold...If I was going back 20 years ago, I would never have applied for a job where I would be assessing people with medical and physical disability. So to find myself in a job now I'm doing, it really doesn't inspire me at all..."

<div align="right">Lydia (CW, Time Period 1)</div>

With the Project, Lydia noticed that the line manager post was removed, and the Project Board was not sure whether the line manager post would be restored in the future. Lydia became a front line member of staff, and carried a caseload like the other staff for 12 months. She found the operational role, especially the medical assessment, very difficult. Because of her dislike of medical assessment and the uncertainty of the line manager post, Lydia tried to find other jobs but failed. Lydia was frustrated and felt trapped by the situation.

"...But the last 12 months have been very very difficult, and I didn't know when we were first enrolled to the project, because I was totally operational, whether there would be a team leader, whether that (the Project) would go anywhere..."

"...I've always enjoyed my work, always enjoyed coming to work. The last, say 12 months, it was very difficult for me, because it's been a total turnaround. I've been from total enjoying the job to intensely disliking my job. I didn't know whether I could continue the role. I started to look at what else is out there, but at my age, employers are reluctant to take people on. So I felt I was limited and trapped, and I haven't got anywhere else to go really..."

<div align="right">Lydia (CW, Time Period 1)</div>

Lydia found that doing both medical and financial assessments in a single visit was information overload for customers, given that most of the customers were elderly or disabled. Lydia was worried that customers were unable to digest these information.

"…I think sometimes that's too much for the customer. You know, it's a lot of information to get in one sitting for the customer…You need to get some preparation for some of it, like the financial side of, you are going to someone's house, and you are asking questions about their independence, their personal care, and then disabled, ok, then. I can consider giving you a level access shower, you are not in the benefits, so now we have to apply for a means test. If somebody is not feeling very well, that's quite a lot of information. I think that it's probably better to break it up, because you might go there and you say these are your options of bathroom, have you thought about X, Y, Z? Have you thought about moving? Have you thought about, you know, they might have to pay something towards it. Sometimes I think it's too much when you going out on one visit, I think it might be better just to break it up…"

<div align="right">Lydia (CW, Time Period 1)</div>

Lydia found the management of the Project to be inefficient, noting the two recording systems for OTs and OTAs. She was dissatisfied with the duplication that OTs and OTAs had to do. Lydia was also worried that customers could not get a good service with the disconnected IT systems.

"…For the county staff, they still have to feed the old system. I think it's easier for us caseworkers. We haven't got this expectation that we complete and feed this previous system, whereas they still have to do it. For them, it's quite a lot harder, it's like their work has been duplicated, have to feed the system, there is reluctance to let that (the County Council recording system) go…"

<div align="right">Lydia (CW, Time Period 1)</div>

Lydia expressed worry, frustration, and dissatisfaction in being assigned to her new role. All the anomalies noticed were taken as sensemaking cues. Lydia was disengaged in making sense of what might happen in the future, *"…I've no idea, I might find another job, I don't know what might happen…"*. As mentioned earlier, the happenings to OTs, OTAs and the

customers also affected how Lydia made sense of the Project. The OTs and OTAs have to do two recordings, which Lydia regarded as a result of the bad organisation of the Project. She also found that the Project overburdened customers with too much information during one visit. Thus, Lydia asserted that the Project provided a streamlined service, which quickened the customer journey to some extent, but with less good quality.

Two months after the Time Period 1 interview, Lydia reassumed her line manager and senior caseworker post. One year later, from the time Lydia got back her line manager post, the Time Period 2 interview was conducted. Lydia regarded her responsibility as supporting staff and helping them to get to full competence. In Time Period 2, Lydia noticed that: 1) getting back to line manager post; 2) staff leaving; 3) HAO becoming more competent doing the job; 4) new staff joining; 5) service becoming more adaptation focused; 6) service settling down gradually; 7) telephone assessment; 8) information overload for customers.

Lydia was very happy that the line manager post was back in position. She enjoyed helping with the development of staff competency and the team compared to being a front line staff and doing the assessments.

"...In the main I'm enjoying what I'm doing. I'm enjoying the support. I enjoy people. I didn't enjoy the assessments, and going out into the community and doing the assessments for people, the disability assessments. So I feel this suits me better, I feel I could use these people skills to support the team rather than support the community. Yeah, I feel a lot happier than I did..."

Lydia (CW, Time Period 2)

Lydia found that both temporary staff and OTs had a high turnover rate in the Project. She

asserted that there was a lot of investment given to the temporary staff, but they left for other permanent jobs. Lydia felt frustrated, and stated that the temporary staff leaving created great difficulty.

"...We had a lot of temporary staff, that was really difficult, I'd say that's more difficult at that stage, because we were having to go through an intensive schedule with them, and then they are leaving, they were continuously replaced, and that was really very very hard, and that took, I felt very frustrated about that, because it took up so much time. You have to invest so much time in getting somebody up to speed to be able to do the job, and then they will be looking somewhere else for a permanent position and we lost quite a few people like that..."

Lydia (CW, Time Period 2)

However, Lydia showed an understanding of the leaving of OTs and OTAs. She asserted that people were asked to work outside their role remit, and therefore, they were resistant to the Project and chose to leave the position.

"...The people who were in the project when we first started, they had memories of how things used to be...they were doing the job they applied to do, and they were expecting to do; whereas in the new regime, they were expected to do tasks they weren't comfortable with, they have to learn to do, they wouldn't have necessarily chosen to do...so it was not the job we set out to do..."

Lydia (CW, Time Period 2)

Lydia found the HAOs were getting better with their jobs. She also understood that HAOs need reassurance sometimes regarding specific cases. Thus, she was not frustrated or worried when HAOs had certain problems that they could not deal with.

"...I think in the main they (HAOs) are getting on quite well with it. They are all quite confident, but as you probably picked up this morning, they do need reassurance that they are doing things properly, and this role is really unique, everybody is an individual, and their problems are individual as well. So you often come across different situations, you can't guarantee that because you know how to put a bath for one person, and that's gonna be appropriate for another person, so you have to weight up and take into consideration that individual and that individual person's difficulty, and sometimes they need to get some advice about or reassurance about what is the right solution for that person..."

<div align="right">Lydia (CW, Time Period 2)</div>

Lydia was pleased that new staff joined the Project. She argued that new staff were eager to learn, and had no preconceptions about how the service should be delivered.

"...I think as well, because the staff we've got now are new, so they've not come to the service with any preconceived ideas of how it used to be, they've got no knowledge of how it used to be. They are eager to please, because it's a new challenge for them..."

Lydia was worried that the service provided by the Project had become more adaptation focused. However, her worry was less intense compared with the Time Period 1 interview.

"...I feel like we've become almost an adaptation service. You know, it's good I'm saying we are still proving other types of work, services for customers, but we are not actually doing the job anymore. What we are doing is we identify and we signpost on, with no real re-assurance that that person has got the capabilities to access these services, or they are following things through. It's not good doing an adaptation to a property if that person is living in a cold and unheated property. It's not working if they haven't got a carpet on the floor. The basics that you would need, that's equally important to somebody I feel, having that comfort, that

security…"

Lydia was pleased to see that the service was settling down gradually. She believed that in a few months' time, the service could be even better and more improvements could be made to service development.

"…I've got some good ideas I think, for developing, but you know, the team is a bit more stable. I don't think we can put those (some good ideas) in place yet, but that inspired me a little bit. I think eventually things will settle down. In the last twelve months, things have settled down for quite a lot. I can see that maybe six months, nine months, things could be even better. We can focus on the service development, and you know, making some improvements to what we are actually doing…"

Lydia (CW, Time Period 2)

Lydia asserted that the telephone assessment was a waste of time. On one hand, there were lots of irrelevant calls to the Project team. On the other hand, the County Council has an established contact centre, which could be utilized to filter the calls to the Project team. Lydia was also worried that customers did not get a good service because of confidentiality issues resulting from inadequate equipment in the Project team. Interestingly, Lydia only noticed this anomaly in the second interview. One possible reason is that as a line manager, Lydia would consider the most efficient way of staff doing the job, and thus, she identified telephone assessment as a waste.

"…One of the biggest wastes of time I think is that duty desk. It has tied up too many people doing that duty desk, and we are duplicating again what's happening in the County Council. I think all those calls should go through one route. It should go to the Greenshire County

Council, be screened, and they should be sent over to us. We can still do the assessments here, but we have a lot of waste calls that come through that desk, and people got involved doing things that really have nothing to do with Project... I can see that there is a lot of time wasted trying to sort out problems that really have nothing to do with us, when there is already a team set up for a robust system. There are all sorts of issues on that duty desk. There are issues about confidentiality. They are discussing some really sensitive issues over telephone…and that's been discussed in an environment that could be overheard by housing colleagues, and it's just not very nice. I would not like to think that my details have been discussed in an open environment like that. For customers, they can hear background noise, I mean, I can hear, it's been discussed in an open office things that are very very private, you know, it's not ideal…"

Lydia (CW, Time Period 2)

As with the first interview, Lydia was worried that it might be overwhelming for customers to have just one single visit for both medical and financial assessment. Also, she contended that for staff there might be a lot to do in one visit as well. Interestingly, in the Time Period 2 interview Lydia focused on staff as well, compared to the Time Period 1 interview. One possible reason could be that in the Time Period 1 interview, as a caseworker, Lydia was more focused on her peer the front line staff, whereas in the second interview, she noticed the anomalies from the perspective of a line manager.

"…I think it's too much for the customers sometime, to go out, to do it all in one hit, where they've got assessment, they've got to provide all their financial details, and proposedly doing more, home safety as well when we were out there. I just don't think it's feasible sometimes to do all that. So I personally feel that maybe it doesn't necessarily have to be one person doing everything, going to the doctors, having, you know, you expect people to take

different roles, to do different tasks, so I don't know…"

<div align="right">Lydia (CW, Time Period 2)</div>

Also, as a line manager, Lydia was more familiar with the future strategy of the Project. The possibility of adopting the Flare system gave Lydia more confidence in the Project.

"…So hopefully at some point, we will be using Flare…Flare is a professional (system), I've got a lot of confidence for Flare, cause I've used Flare before, and it's a professional robust system. We will link it to the spreadsheet, is my understanding. It will produce documents, it will have lots of qualities the spreadsheet hasn't got, and it will have, you will see the historic data there, who's done what previously, so that will be useful, it will be useful for budgeting, and they are using flare for the recording, and the grants, and everything on, so hopefully it will stop that duplication as well, so I'm quite confident that will be good…"

<div align="right">Lydia (CW, Time Period 2)</div>

Lydia believed that in the future, people would become more experienced and proficient in doing the Project. As a result, fewer OTs would be needed.

"…When people become more multi-skilled, more experienced, it could be that we don't need as many OTs, but we haven't got the evidence to support that now, but that's what I think would happen…"

<div align="right">Lydia (CW, Time Period 2)</div>

The eight anomalies noticed by Lydia were all considered at the selection stage. In Time Period 2, Lydia returned to her line manager post and stopped doing OT medical assessment. She maintained the core activities she valued and witnessed the challenges brought by the Project to staff. Thus, the Project brought a mixed impact on Lydia's role identity. Accordingly, Lydia expressed both positively and negatively valenced emotions towards the anomalies noticed.

Lydia believed that in the future staff would be more experienced and proficient in carrying out their activities, and her prospective sensemaking is past-oriented. Thus, Lydia developed an ambivalent view about the Project, arguing that some parts of the Project were good, and some not good for the customers. More specifically, Lydia believed that the new process was helpful for simple cases, but for complex cases, staff should stick to their specialisms so as to provide the customers a better service.

"...if it's a straight forward case, say you've got somebody who just needs an adaptation, then one person can deal with that. But when you need some specialist support, you've got people in that team who've got that right skills, and you can say, this is more complex, and you've got that set of skills, I'd like you to work with the customer…"

Lydia (CW, Time Period 2)

"...At the end of the staff meeting, people got engaged in talking about the Project in general. They felt that the changes in the Project were more effective at the beginning than now, the possible reason they concluded were that the workload increased by almost half. Lydia mentioned at the end of the conversation that: "more visits should be done, but the OTs are tired up with administrative work. One should focus on one's own speciality…"

(Staff meeting observation 1)

6.6. Summary

This chapter looks at the sensemaking of the CWs, the TO, and the HAOs by examining how and why particular cues are selected for sensemaking. Elements including prospection, work role identity, and emotions are discussed with regard to each individual's sensemaking. The CWs, the TO, and the HAOs exhibited four different behaviour, those of a reluctant participant, an accepting actor, an active participant, and an ambivalent recipient.

Similar to disengaged actors of OTs and OTAs, reluctant participants experience dissonance between their original work role identity and the role identity associated with the Project. They are also challenged by the other members of the organisation, and their working autonomy is affected. Staff in this category exhibit negatively valenced emotions and disengage with the Project. Their sensemaking is more focused on a few anomalies and their prospective sensemaking is more future-oriented. People in this category resolve to staying in the Project and complain while carrying out daily activities.

There is a small disparity between accepting actor's original work role identity and the role identity associated with the Project. This small disparity leaves people enough challenge to accomplish the next level of learning. People in this category show positively valenced emotions and express positive views of the Project. Nevertheless, they might have doubts about the Project compared to elite actors.

Active participants are the newly recruited HAOs. They are actively engaged in learning the new role and taking on the activities entailed. Active participants exhibit positively valenced emotions towards the anomalies noticed. Active participants are positively engaged in making sense of what might happen in the future based on previous events, and construct a positive sensemaking outcome of the Project.

Ambivalent recipients in this chapter experience both an enhancement and a decrease in their work role identity. They show both positively and negatively valenced emotions towards the anomalies noticed with the Project. They accept the Project ambivalently and might disapprove of certain aspects of the Project.

Chapter 7 Discussion

7.1. Introduction

The previous two chapters presented and analysed the data collected with regard to different groups. Chapter 5 focused on the OTs and the OTAs. Chapter 6 analysed the CWs, the TO, and the HAOs. This chapter brings the data analysis together and develops a sensemaking model incorporating work role identity and emotion based on Weick *et al*. (2005). Based on chapters 5 and 6, Table 7.1 lists the initial and assigned roles of all the recipients prior to and after the Project, as well as their emotions and sensemaking outcomes of the Project. As Table 7.1 shows, individuals' work role identities, emotions, and sensemaking outcomes changed in the period of the study. This chapter also discusses prospective sensemaking.

7.2. Role identity and sensemaking

The findings chapters reveal three interactive patterns of work role identity and sensemaking. In the first pattern, people's work role identities are enhanced through a supportive role set and the maintaining of the core attributes they value in a role. Their views of the Project are positive in general. The second interactive pattern of work role identity and sensemaking is that of threatened role identity and value dissonance, where informants exhibit negative attitudes towards the Project. In the final category, people either accept the Project with some doubts or have an ambivalent level of acceptance of the Project, i.e., they disagree with the design of the Project. People in the final category either experience a mixed impact on their work role identities, or experience maintained and protected work role identities with the Project. The following section further explains the three patterns.

Table 7. 1. Role identities and sensemaking results of the employees of the Project

	Role prior to the Project	Role after the project	Emotions	Sensemaking about the Project
Edward	*LM (line manager)+ OT*	*LM+OT (occupational therapist)*	Mild emotions (T1) Positively valenced emotions (T2)	Ambivalently accept (T1) Accept (T2)
Lydia	LM+CW (caseworker)	CW+OTA (OT assistant) (T1) LM+CW+OTA (T2)	Negatively valenced emotions (T1) Positively valenced emotions (T2)	Reject (T1) Accept (T2)
Laura	OT	OT+CW (T1) Senior OT+CW (T2)	Negatively valenced emotions (T1) Positively valenced emotions (T2)	Reject (T1) Accept (T2)
Victoria	OT	OT+CW	Negatively valenced emotions (T1)	Reject (T1)
Helen	OT	OT+CW	Negatively valenced emotions (T1)	Reject (T1)
Leo	OT	OT+CW	Mild emotions (T2)	Ambivalently accept (T2)
Adele	OT	OT+CW	Positively valenced emotions (T1)	Accept (T1)
Sally	OTA	OTA+CW	Negatively valenced emotions (T1) Positively valenced emotions (T2)	Reject (T1) Accept (T2)
Emily	OTA	OTA+CW	Negatively valencced emotions (T1)	Reject (T1)
Justin	OTA	OTA+CW	Negatively valenced emotions (T1)	Reject (T1)
Lizzy	CW	CW+OTA	Positively valenced emotions (T1&T2)	Accept (T1&T2)
Mellissa	CW	CW+OTA	Positively valenced emotions (T1&T2)	Accept (T2)
Mark	CW	CW+OTA+IT expert	Positively valenced emotions (T1&T2)	Accept (T1&T2)
Simon	TO	CW+OTA	Negatively valenced emotions (T1&T2)	Reject (T1&T2)
Elaine	CW	CW+OTA	Negatively	Reject (T1)

			valenced emotions (T2)	
Gillian		HAO (CW+OTA)	Positively valenced emotions (T2)	Accept (T2)
Adam		HAO (CW+OTA)	Positively valenced emotions (T2)	Accept (T2)
Jess		HAO (CW+OTA)	Positively valenced emotions (T2)	Accept (T2)

7.2.1. Enhanced role identity and sensemaking

Within this category, two groups emerged from the data. I labelled them as elite actor and active participant. People are elite actors when their valued qualities in a role are enhanced, such as the cases with Laura (OT) and Sally (OTA). As has been seen in Chapter 5 section 5.3, Laura did not identify with the new role in Time Period 1, this was because a large gap was identified between Laura's original role identity as an OT and the role identity associated with the Project. The elements she valued in her OT role were diluted by the taking on of other activities. The actions Laura took were to keep a distance from the CW role and to avoid carrying out financial assessments. The professionalism that Laura attached to her OT role was encroached upon by other non-qualified staff learning the OT assessment. Thus, Laura developed a negative view of the Project, similar to the other OTs and OTAs in Time Period 1.

However, in Time Period 2, Laura began to identify with the new role. She informally assumed the role of a senior OT; since she was the only experienced OT left in the team, and mentored all staff until they were competent to carry out the assessments. Laura also represented and promoted the Project at several events. She was also asked to provide training to new staff for the Project South. The new role gave Laura the opportunity to practice her OT philosophy, which enhanced her role identity as an OT. In addition, Laura

became proficient in fulfilling her CW role, and this helped her to feel more stable in an interim role identity.

People also experience an enhanced role identity when they actively shape their role identities. Individuals that fell within this category included newly recruited staff including Adam (Housing Assessment Officer), Gillian (HAO), and Jess (HAO). The role identity brought by the Project, namely OT without qualifications, was an enhancement of Adam's previous role identity, which was an operator in a call centre.

For both Gillian and Adam, the role identities associated with the Project progressed from their previous role identities. Gillian (HAO) had been working as an admin support in a similar organisation for eight years before joining the team. Jess (HAO), meanwhile, was a fresh graduate as an occupational therapist, but her role identity as an OT was in flux and was not yet attached to the OT role identity. Thus, there was similarity in the three cases, since none of these individuals were as yet registered to a particular role identity, and were ready to embrace new roles.

To sum up, an enhanced role identity arises both as a result of a supportive role set and the enhancement of valued norms and attributes of one's role identity. The enhancement could be the enrichment of certain valued elements of a role. For example, as an elite actor, Laura was able to experience the continuity and enhancement of valued core attributes by mentoring other colleagues and practicing her OT philosophy within the new role. This enhancement may be seen to have reflected the 'positive-distinctiveness' elements of role identity associated with new roles (Ellemers *et al.*, 2002; Petriglieri, 2011). The positive-distinctiveness elements of the new role identity could be achieved through changes in both

the content and the context of a role. For instance, Adam took pride in being an OT without a qualification.

7.2.2. Threatened role identity and sensemaking

Two sub-groups fall within this category: the disengaged actor and the reluctant participant. Disengaged actors in this study included Justin (OTA), Emily (OTA), Helen (OT), and Victoria (OT). As mentioned in Chapter 5 section 5.2, Helen valued her OT role, which became diluted with the Project. According to Helen, the encroachment on her role was reflected in the following two respects. On one hand, Helen gave high importance to her autonomy at work, which was challenged by her new role set, the CWs working with her. The level of dissatisfaction and hostility expressed by others in the team towards Helen contributed significantly to her perception of her role identity.

On the other hand, Helen's role boundary expanded to include other housing related services, rather than purely OT assessment. Being an OT made Helen feel a sense of professionalism, whereas fulfilling the caseworker role, which she was not proficient in, undermined this sense of professionalism. Moreover, the assigned new role required Helen to carry out telephone medical assessments, which she felt was a step down from her original OT role. According to Helen, her anxiety in doing telephone assessment was also because telephone assessment led to other inappropriate calls being made.

Therefore, Helen did not agree with the processes brought about by the Project. She believed that the system would work better and more efficiently if people were to stick to their own roles and specialisms. There was a large disparity between Helen's original role identity and the role identity associated with the new role brought by the Project. In addition, no attempt

was made to reduce the large disparity in Helen's role identity. The action that Helen took was to exit her role and to leave the organisation.

The reluctant participant category included Simon (Technical Officer) and Elaine (CW). Simon was not proficient in either the financial assessment or medical assessment; thus, he experienced a large gap between his original role identity and the role identity associated with the new role. In Time Period 1, Simon took all the anomalies he noticed in his sensemaking of the Project, apart from the anomaly work becoming more adaptation oriented. A possible reason could be that these anomalies either affected the attributes that Simon valued in his role, or exposed him to the challenges presented by his role set.

More specifically, Simon was anxious to do the OT assessment and worried that he might prescribe the wrong equipment for customers. Simon's lack of competence in doing the OT assessment affected his sense of professionalism he valued in doing a job. Simon also regarded the assigned role as one of admin and filling forms, rather than visiting the clients. Moreover, the challenges brought by Simon's role set were those of being mentored, lack of care from the management, and OTs and OTAs recording data twice on two different systems. Simon felt being mentored was declaring his unprofessionalism in doing his job. Also, OTs and OTAs using two recording systems and duplicating paperwork made him feel that the Project was not well organised, and this, therefore affected his sensemaking about the Project.

In Time Period 2, despite Simon becoming more proficient in carrying out the OT assessment, he did not fully identify with the role identity brought about by the Project. Simon's threatened role identity could also be seen in his empathy with the challenges experienced by his role set in Time Period 2. These challenges affected how Simon made

sense of the Project. Therefore, although Simon remained within the team, he also caused some trouble. This trouble making was reflected in his complaints and dissatisfaction towards minor things such as logging on of training courses, keeping records of telephone assessments, and minute taking. Moreover, as I mentioned in Chapter 6 Section 6.2, he insulted middle managers, and was sarcastic about the Project.

To sum up, disengaged actors normally find a high level of value dissonance between their previous role identity and the role identity associated with their new roles, and thus, may decide to leave the job. However, despite finding great value dissonance, some people might stay with the job, but express dissatisfaction in carrying out their daily jobs. The most common characteristic within these two responses is that of 'condemning the condemners' (Sykes and Matza, 1957; Petriglieri, 2011). For example, disengaged actors leave the job and declare the invalidity of the Project's design, whereas the reluctant participant category questions the very ability of the managers to manage. Role identity exit ultimately avoids the threat to one's role identity by condemning the change or the people that initiate such a change. Condemning the source of identity threat protects one's identity (Petriglieri, 2011).

7.2.3. Mixed impact on role identity and sensemaking

The third category involves a mixed impact on role identity and includes two sub-groups, i.e., ambivalent recipients and accepting actors. Ambivalent recipients include Leo (OT), Edward (OT), Lizzy (CW) in Time Period 2, and Lydia (CW) in Time Period 2. Accepting actors include Adele (OT), Melissa (CW), and Lizzy in Time Period 1.

The role identity of Leo as an OT, an ambivalent recipient, was not as strong as those who left the organisation. As an OT, Leo's job prior to joining the team focused solely on carrying

out telephone medical assessments. Within the Project, his role identity changed to include face to face medical assessment and the caseworker role such as financial assessment and recording on the two systems. Therefore, Leo's role identity was enhanced to some extent, since he was able to carry out some medical assessments on a face to face basis, rather than simply by telephone. However, staff turnover affected Leo's role identity. Some of the cases that were left were challenging for Leo, the mishandling of which affected Leo's professionalism and created dissatisfaction. This might explain the decrease in Leo's role identity as an OT.

Leo also regarded his fulfilling of the caseworker role as a decrease in his professionalism. Nevertheless, he was recruited under the Project, and he was aware that his role as an OT would include both the OT assessment and caseworker role. Therefore, Leo's reactions to the caseworker role were not as strong as those of other OTs such as the disengaged actor Helen. Leo believed that the Project was to streamline the service and make it faster. Nevertheless, Leo did not approve of how the Project was designed and believed that people should stick to their specialism.

The accepting actor category is normally characterized by a maintained or protected role identity within the Project. The valued attributes of Adele's previous role, i.e., autonomy and flexibility, are maintained in the new role. Adele was also aware of the clear line of demarcation between the responsibilities of OTs and CWs in carrying out the OT assessment; thus, her work role boundary was also maintained. However, Adele experienced challenges with her role set. She found that customer rapport after the Project was not as good as it had been prior to the Project's inception. She also believed that there would be fewer OT jobs in the future. Thus, Adele ambivalently accepted the Project and the new way of working.

To sum up, people falling within this category experience a mixed impact on their role identities. This mixed impact might be reflected in one of the following two scenarios: people experiencing both gains and losses of valued attributes in the new role content and role set such as the ambivalent recipient Leo; or the continuity of one's core activities and at the same time challenges brought by role set, as in the case of Lizzy and Lydia in Time Period 2. The role identities to which people under this category attach themselves lie somewhere in between their original role identity and the role identity associated with the new role. People in this 'between identities' space normally face identity conflict (Ibarra, 2007), and therefore, sensemaking in this category is ambivalently accepting the Project.

7.2.4. Work role identity in sensemaking

Previous research has shown that change recipients' level of participation affects their sensemaking of a particular change initiative (Maitlis, 2005; Bartunek *et al.*, 2006). This study goes further, by revealing the underlying reasons for different levels of staff participation in organisational change. The current research shows that depending on the disparity between one's role identity and the role identity associated with the new role, people's views of the Project vary.

Three patterns of role identity and sensemaking are disclosed, these being enhanced role identity (Ellemers *et al.*, 2002; Petriglieri, 2011), threatened role identity (Petriglieri, 2011; Ashforth, 2001), and mixed impact on role identity. This section now seeks to draw on the data analysis and explain the relationship between role identity and sensemaking outcome.

This study has also shown that the sensemaking process is messy, and the outcome of sensemaking and the ongoing development of work role identity involve several iterative

mini-cycles (Figure 7.1). The initial sensemaking result provides individuals with a repertoire to re-examining or realigning one's perceived self and the assigned role. Similar to the cyclical pattern of sensemaking proposed by Balogun and Johnson (2005), the main difference is that the current study shows more specifically how the mini-cycles are formed through the lens of work role identity. For example, as analysed earlier, elite actor Laura and Sally objected to the Project in Time Period 1. However, with the enhancement of their valued aspects of their roles and a supportive role set, Laura and Sally became elite actors in carrying out the new role brought by the Project.

Figure 7. 1. The spiral pattern of role identity and sensemaking
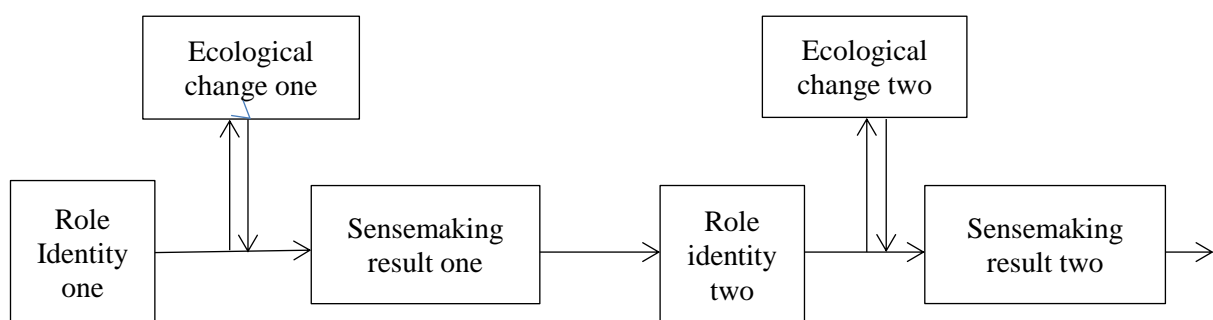
Nevertheless, there might have been several mini-cycles during the Project, of arbitrary length. I only know what I know in this case based on data collected in Time Period 1 and Time Period 2, and thus, role identity 1 and 2 are only the role identities at the time of the interviews and my analysis is in effect a simplified version of the dynamics between role identity and sensemaking.

In addition, the initial role identity and the role identity associated with the new role are two ends of a spectrum. There are several interim role identities on the spectrum, which are in between the initially perceived role identity and the role identity associated with the new role

(Figure 7.2). The recursive process between role identity and sensemaking goes on until one identifies with the assigned role identity or the process is terminated by individuals leaving the organization.

Given the socially constructed nature of role identity (Ashforth *et al.*, 2008), one's interim role identity and the role identity associated with the new role are malleable, and may be adjusted. Therefore, people may actively engage in role identity reconstruction, so that the finalised role best reflects the attributes they value in their work roles (Nicholson, 1984). For example, elite actors and active participants actively assimilate certain aspects of the new role into their interim role identity, so that it will be easier for them to identify with the new role.
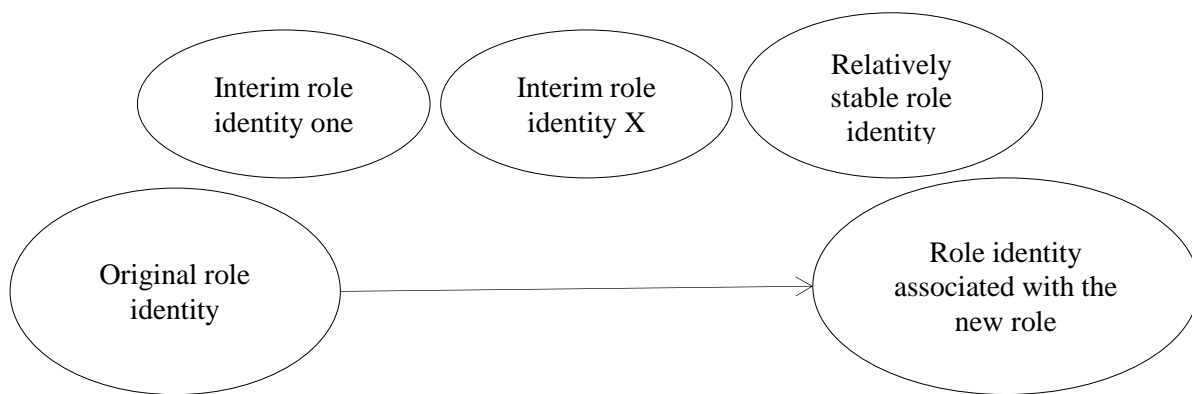

Figure 7. 1. The role identity spectrum

With the mini-cycles, employees' sensemaking moves from conscious to unconscious, until a point of equilibrium, i.e., unconscious sensemaking (Maitlis *et al.*, 2013) is reached. During this process, people either identify or dis-identify with the changes to their original role. Role identities are continuously adjusted and redefined in order to achieve a balance between one's desired self and the role assigned to individuals, as with the 'punctuated equilibrium model' discussed in Chapter 3 section 3.4 (Gersick, 1991; Ashforth, 2001).

However, the equilibrium is not only reflected in the alignment between one's original role identity and the role identity associated with the new role, but also on one's emotional state. The next section examines emotion in sensemaking, which emerges as a crucial part of sensemaking from the data analysis conducted.

7.3. Emotion and sensemaking

It seems evident that at an empirical level the recipients of the Project had emotional reactions to what was happening around them (chapters 5 and 6). Scholars have also found that people exhibit emotional responses towards changes in the environment (Walsh and Bartunek, 2011; Weick *et al.*, 2005). Emotion thus plays a crucial part in sensemaking (Bartunek *et al.*, 2006; Maitlis *et al.*, 2013), and is a factor to be managed in the sensemaking process (Weick *et al.*, 2005). Researchers have called for more studies on emotion in sensemaking (Weick *et al.*, 2005; Bartunek *et al.*, 2006; Myers, 2007; Maitlis and Sonenshein, 2010; Weick, 2010).

Chapters 5 and 6 coded the emotions expressed by individuals with regard to previous research on emotion and sensemaking (Walsh and Bartunek, 2011; Cornelissen *et al.*, 2014). Consistent with previous studies (Huy, 2002; Cornelissen *et al.*, 2014), emotions are identified through interviews and observation of team meetings and training. Following this, the relationship between the identified emotions and the triggering of sensemaking as well as the selection of sensemaking cues was examined.

In the light of earlier work by Maitlis *et al*. (2013) and Liu and Maitlis (2014), this study focuses on the valence and intensity of emotion (Table 7.2). Liu and Maitlis (2014) studied the role of emotion in top management decision-making, and mapped five kinds of emotional dynamics, i.e., excited, neutral, amused, annoyed, and frustrated. However, the spectrum of

emotions in this study is broadened, given the emotions emerged from the data collected.

As shown in table 7.2, this study revealed the following positively valenced emotions: relief, satisfaction, enjoyment, pleased, and excitement. Relief and excitement are classified respectively as mild and strong positively valenced emotions. The other three emotions appeared in the data, satisfaction, enjoyment, and pleased, are classified as moderate positively valenced emotions (Huy, 2002; Maitlis *et al.,* 2013). Negatively valenced emotions in this study include dissatisfaction, disappointment, worry, anxiety, frustration, and anger. There are three moderate negatively valenced emotions, these being worry, disappointment, and dissatisfaction, and three strong negatively valenced emotions, encompassing anger, anxiety, and frustration (Huy, 2002; Maitlis *et al.,* 2013).

Table 7. 2. The intensity and valence of emotion

Valence of emotion	Intensity of emotion	Examples
Positively valenced	Mild	Relief
	Moderate	Satisfaction, enjoyment, pleased
	Intense	Excited
Negatively valenced	Mild	Rational explanation of phenomenon
	Moderate	Worry, disappointment, dissatisfaction
	Intense	Anger, anxiety, frustration,

The following section firstly discusses the data analysed in Chapters 5 and 6, with a particular focus on emotion and sensemaking. It is organised according to the discussion fashion in role identity and sensemaking section. The rationale for doing so is as follows. As shown in Chapters 5 and 6, people in the enhanced role identity category showed positively valenced emotions in general; informants from the threatened role identity group expressed negatively valenced emotions; and those that experienced a mixed impact on the role identity category exhibited mild emotions or both positively and negatively valenced emotions. This discussion focused on the relationship between the emotions and the triggering of the sensemaking

process, and the dynamics of selecting and deselecting certain anomalies as sensemaking cues. Following this, a tentative model of emotion in sensemaking is developed with regard to the existing literature on emotion in sensemaking.

7.3.1. Positively valenced emotions and sensemaking

Consistent with the analysis of role identity and sensemaking, Laura, an elite actor, may be used as an example to examine the role of emotion in sensemaking. Following this, the emotions and sensemaking of active participants are detailed, with Adam being given as an example.

As highlighted in Table 5.2, in Time Period 1, elite actor Laura's selection of sensemaking cues focused on four anomalies, which were associated with moderate and intense negatively valenced emotions such as worry, frustration, and anxiety. For example, Laura found it difficult to understand the tasks involved in financial assessment, and was frustrated that the process obstructed her work flow. These four anomalies were taken as sensemaking cues. This corroborates to the arguments advanced by some scholars (Carver & Harmon-Jones, 2009; Walsh and Bartunek, 2011), namely that, moderate and intense negatively valenced emotions might trigger the sensemaking process.

However, no specific emotions were expressed towards some of the anomalies noticed. For example, Laura did not show emotions towards mentoring caseworkers, training or carrying out telephone medical assessments in her sensemaking process (Table 5.2). These anomalies were briefly mentioned, but not extensively reflected upon and selected for her sensemaking of the Project. As Maitlis *et al*. (2013) argue, anomalies that do not elicit specific emotions could not trigger the sensemaking process.

Moreover, Laura expressed a level of satisfaction at the quick service that customers obtained with the Project, but she did not take this anomaly as a sensemaking cue. One possible explanation for this might be that Laura was already experiencing moderate and intense negatively valenced emotions, and she tended to generalise and homogenise her emotional experiences (Bartunek *et al.*, 2011). The cues that elicit positively valenced emotions in this case were therefore not considered.

The actions that Laura took were to distance herself from the CW role and to stick to the OT role. Together with her interpretation of the purpose of the Project (cutting down OT staff), and her moderate and intense negatively valenced emotions, Laura developed a negative view of the Project and its future.

In Time Period 2, six out of eight anomalies noticed by Laura brought moderate and intense positively valenced emotions such as satisfaction, happiness, enjoyment, and excitement (Table 5.2). For example, Laura enjoyed mentoring other colleagues about OT assessment in Time Period 2, and she was happy to air and practice her OT philosophy. All six anomalies were taken as cues for her sensemaking. Moderate and intense positively valenced emotions thus played an active role in triggering sensemaking (Bartunek *et al.*, 2006).

The scenarios for the other two anomalies were more complex. Laura expressed relief towards the anomaly of OTs taking up the CW role. Laura was, for example, relieved that the CW role had been embedded into her practice and had become part of her everyday role. Laura disengaged from taking the cue of OTs doing CW role. This suggests that mild positively valenced emotions did not trigger sensemaking.

Moreover, while the anomaly staff turnover originally elicited worry, a moderate negatively valenced emotion, this was actively dealt with by Laura. The consequence of staff leaving for Laura was a lack of peer support in the team, but this was accommodated by the support from her line manager.

Therefore, Laura disengaged from taking staff turnover as a cue for sensemaking. There might be two reasons for this. First of all, as noted earlier, people tend to generalise their emotional experiences and deselect cues that might cause disharmony, in this case, staff turnover (Ashkanasy *et al.,* 2002; Bartunek *et al.*, 2011). Second, people experiencing positively valenced emotions are more open to alternative approaches to a problem, and strive to make the initiative that caused the positively valenced emotions successful (Rafaeli *et al.*, 2009; Maitlis and Sonenshein, 2010).

Laura asserted in Time Period 2 that the Project provided a holistic and more supportive service to customers. In sum, Laura's emotions towards the anomalies brought by the Project changed from the negatively valenced emotions in Time Period 1 to positively valenced emotions in Time Period 2. Also, Laura's view of the Project was more positive in Time Period 2, compared to Time Period 1. This contradicts the argument made by Liu and Perrewe (2005).

Liu and Perrewe (2005) analysed the emotions of those who experienced change and identified different emotional stages that employees go through in the change process. They found that the emotions experienced at the beginning of the change are more intense than those of the later stage. Laura's emotions towards the Project were intense throughout the change, but with different valences. That is, Laura showed negatively valenced strong

emotions towards the Project in Time Period 1, whereas she showed positively valenced strong emotions in Time Period 2.

Active participant Adam expressed either positively valenced emotions or no specific emotions towards the anomalies he noticed. He was happy to visit customers, and was satisfied with the training he received. Adam showed moderate positively valenced emotions, and the anomalies that elicited these emotions were taken as sensemaking cues.

Moreover, there were no specific emotions elicited for the other anomalies noticed. For example, carrying out a telephone assessment did not elicit strong emotions from Adam, and this cue was not selected at the sensemaking process. Moreover, financial assessment was not a powerful cue for Adam. The main reason for this might be that Adam did not find the telephone assessment or the financial assessment difficult, and he was actively involved in seeking coping strategies for both telephone and financial assessments. Thus, moderate positively valenced emotions were able to ignite the sensemaking process, and enable individuals to be more open to other alternative approaches to solving the problem (Rafaefi *et al.*, 2009; Maitlis *et al.*, 2013).

7.3.2. Negatively valenced emotions and sensemaking

As shown in Table 5.1, Helen, a disengaged actor, expressed intense negatively valenced emotions of anxiety and frustration towards the anomalies she noticed, i.e., more admin work, taking CW role, and doing telephone assessment. Helen did not engage in all the anomalies she noticed. For example, she did not engage in the quicker process brought about by the Project, CWs doing OT role, and information overload for customers. She was frustrated that the new process was difficult to remember, and she felt that she had lost her professionalism

in doing her daily job.

The intense negatively valenced emotions triggered Helen's sensemaking process; however, at the selection stage, the turmoil emotional state made Helen emotionally charged and required substantial effort to be restored. Therefore, Helen was disengaged when making sense of the ecological change, and she chose to exit the Project. As scholars argue, intense emotions such as fear, panic, and anger might impede the sensemaking process (Maitlis and Sonenshein, 2010; Cornelissen *et al.*, 2014).

The difference between Helen and Laura (in Time Period 1) was that in Laura's case some positively valenced emotions were also elicited, rather than pure intense negatively valenced emotions. Although these emotions were homogenised for Laura, that is, Laura only selected the cues that elicited negatively valenced emotions, the positively valenced emotion did have some effect in balancing Laura's emotional state. However, Helen only experienced intense negatively valenced emotions, which required even more of an effort from Helen to continue the sensemaking process.

As mentioned earlier, the reluctant participant category also exhibited negatively valenced emotions. For example, in Time Period 1, the anomalies noticed by Simon elicited moderate and intense negatively valenced emotions such as worry, anxiety, and frustration. He was worried that he might make a wrong medical assessment. Simon also expressed dissatisfaction and disappointment towards anomalies such as being mentored, not being able to see the final products, taking the CW role, and the lack of care from management. However, the fact that the service was more oriented to adaptation did not elicit specific emotions from Simon, and this anomaly was not selected as a cue for sensemaking.

Unlike Helen, Simon stayed in the team, but he made a lot of complaints while carrying out daily activities brought in by the Project, as could also be seen from his emotions. For example, the most frequently expressed emotion in Time Period 2 was the moderate negatively valenced emotion of dissatisfaction, despite Simon's proficiency in the new role. Nevertheless, his emotions towards the anomalies eventually toned down, and the emotions expressed towards the anomaly of doing OT role were not as strong in Time Period 2 as in Time Period 1, which were mostly anxiety and worry. For example, Simon felt relieved that he mastered some knowledge of the OT assessment, and became more confident in carrying out the assessment. This is consistent with Liu and Perrewe (2005), who argue that people's emotions towards change are less intense at a later stage of the change, compared to the initial stage.

The sole presence of intense negatively valenced emotions leads to meaning void; as a result, individuals might disengage with the Project and leave the organisation such as Helen, Victoria, Emily, and Justin, or stay with the Project and complain when carrying out daily activities such as Simon and Elaine. As Walsh and Bartunek (2011) argue, an intense negatively valenced emotion might lead to a pause in sensemaking. Thus, people in this category believe that they should stick to their own roles as they were prior to the Project. They contend that the Project is merely intended to get staff to do more work with the same amount of resources.

7.3.3. Mild emotions and sensemaking

This study shows that people express mild or no specific emotions towards some anomalies they notice within the Project. This data set reveals two scenarios for mild or no specific emotions in the sensemaking process. First of all, people's entire sensemaking is

characterised by mild emotions. As an ambivalent recipient, Leo expressed mild emotions towards the anomalies he noticed, and showed ambivalent sensemaking with regards to the Project. For example, he found the financial assessment difficult, but did not show specific emotions in carrying out the caseworker's role.

Secondly, mild emotion or no specific emotion is elicited alongside other emotions. For example, Elite actor Laura showed mild emotions towards some anomalies among other moderate and intense negatively valenced emotions in Time Period 1. She expressed no specific emotions towards mentoring CWs for OT assessment in Time Period 1. Although Laura briefly mentioned that she was mentoring the CWs, she did not select this anomaly as a sensemaking cue.

Simon also showed no specific emotion towards certain anomalies he noticed. For example, he found that with the Project, the service they provided shifted to be more focused around housing adaptation, whereas prior to the Project other housing related services were focused on. However, no specific emotion could be detected in Simon's accounts. He disengaged with this anomaly when making sense of the Project.

To sum up, the presence of mild emotions can either lead to ambivalent sensemaking of the Project, as exemplified by the ambivalent recipient Leo, or to helping people deselect a few anomalies in their sensemaking, as shown by the elite actor Laura in Time Period 1.

7.3.4. Emotion in sensemaking

This section firstly presents findings of this study with regard to previous research on emotion in sensemaking. Then, I will synthesis the findings on work role identity and

emotion in sensemaking and explain the underlying reasons for the dynamics between emotion and sensemaking.

As shown in the previous sections, anomalies that induce moderate and intense positively valenced emotions can trigger the sensemaking process. This study shows that people in a positive emotional state tend to avoid selecting cues that might cause negatively valenced emotions into the sensemaking process. Similarly, scholars have also found that people tend to select information that is in accordance with their current emotional state (Ashkanasy *et al.,* 2002; Bartunek *et al*., 2011). Therefore, people experiencing positively valenced emotions tend to generalise the situation in a positive way, and are also more open to alternative methods in dealing with a problem and active in their attempt to make the initiative successful (Rafaefi *et al*., 2009; Maitlis and Sonenshein, 2010). People in positively valenced emotions such as enjoyment, satisfaction, and pleasure might actively promote the Project to other people or actively participate in the delivery of the Project.

Maitlis and Sonenshein (2010) also contended that positively valenced emotions in change and crisis might induce an overly positive sensemaking result and lead to catastrophe. However, this phenomenon was not seen in the current study, since no informant in the study expressed purely intense positively valenced emotions.

This study shows that both moderate and intense negatively valenced emotions could also trigger sensemaking. Negatively valenced emotions such as anger and anxiety are more likely to instigate sensemaking (Rafaefi *et al.,* 2009; Maitlis *et al*., 2013). Ashkanasy *et al.* (2002) also argue that people experiencing negatively valenced emotions tend to be involved in active sensemaking activities so as to reduce these negatively valenced emotions.

People in negatively valenced emotions generalise their experience to the negative sphere, excluding any possible positive elements and reaching a negative sensemaking result. People experiencing negatively valenced emotions are less open to alternative approaches to problems as compared to people in positively valenced emotions. However, people experiencing moderate and intense negatively valenced emotions might conclude different sensemaking outcomes, and this may result in different behaviour. This study identified the following two sensemaking outcomes and behaviours.

First of all, people experiencing intense negatively valenced emotions such as frustration, anger, and anxiety might disengage in making sense of the Project and exit the organisation. Intense negatively valenced emotions such as fear and panic could meanwhile impede actors' ability in making sense of others' behaviours and eliminate alternative explanations (Maitlis and Sonenshein, 2010; Cornelissen *et al.,* 2014). Second, people experiencing moderate negatively valenced emotions such as worry, dissatisfaction, and disappointment might resolve to stay in the organisation and complain when carrying out their daily activities.

Most of the extant literature on emotion and sensmaking has focused on moderate and intense emotions (Rafaefi *et al.,* 2009; Walsh and Bartunek, 2011; Maitlis *et al*., 2013), while few papers have examined mild emotions in sensemaking (Maitlis and Sonenshein, 2010; Maitlis *et al*., 2013). It seems to be the case that mild emotions are not easily noticed, let alone taken as cues for sensemaking. However, this study shows that people experiencing mild emotions are more likely to develop an ambivalent view of the Project. Also, people tend to disengage with anomalies that elicit mild or no specific emotions in sensemaking.

To sum up, this study shows that both moderate positively and negatively valenced emotions are liable to trigger sensemaking and affect people's behaviour. Bartunek *et al.* (2006) also contended that the arousal of both pleasant and unpleasant emotions in change shows that certain actions should be taken to interrupt the process, so as to maintain a successful change initiative. However, the sensemaking outcomes in the case of positively and negatively valenced emotions were distinct, as has been seen.

Thus, one may conclude that emotions affect sensemaking through noticing and selecting anomalies. Certain anomalies were chosen as sensemaking cues while others were ignored (Maitlis *et al.*, 2013; Cornelissen *et al.*, 2014). More specifically, different anomalies brought about by the stimulus engender emotions with distinctive valences and intensities, and this may serve to determine the extent of an individual's engagement with the very anomalies. That is, people can be highly engaged, ambivalently engaged, or disengaged in taking certain anomalies as sensemaking cues. The cues selected for sensemaking are used to inform meanings and to form presumptions. Presumptions are made to produce a plausible story and inform sensemaking results (Weick *et al.*, 2005; Elfenbein, 2007).

Figure 7. 2. Emotion in the sensemaking process
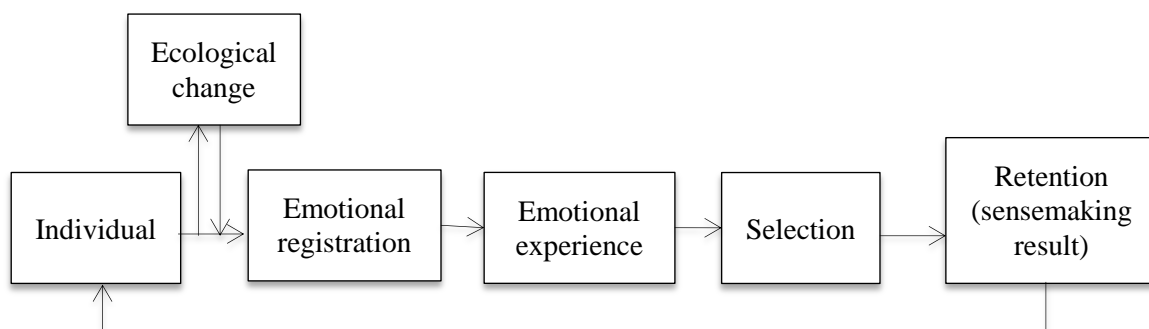
This study is not concerned with the emotional registration process and emotional experience (Elfenbein, 2007); the main concern of this study is the relationship between emotion and the sensemaking process. However, the importance of emotional registration and emotional

experience in the sensemaking process is recognised in the present research, and thus, emotional registration and emotional experience are included in the model (Further information on how an emotion is registered, experienced and expressed is provided by Elfenbein, 2007).

In addition, the study shows that people tend to disengage from one or two anomalies that are not consistent with their current emotional state. This corresponds to the homogenising phenomenon discussed by Bartunek *et al.* (2011). People tend to generalise their emotional experiences, and deselect any cue that might cause disharmony (Ashkanasy *et al.,* 2002; Bartunek *et al*., 2011). A possible reason for the occurrence of homogenisation might be that the one or two exceptional anomalies do not harm the core attributes of one's role identity or their role set. For example, Helen, as a disengaged actor, appeared to be pleased that the new process was quicker than before; however, with the presence of other anomalies that elicited negatively valenced emotions, she did not extract the cue of a quicker process in her sensemaking, as detailed in section 5.2. Helen's core attributes of her role identity were thus autonomy in regards to her health professional work and her immediate role set, rather than a quicker process for customers.

The following section aims to answer the question of why certain cues are selected for sensemaking, from the angle of emotion in sensemaking. Specifically, I will synthesis the findings on work role identity and emotion in sensemaking and explain the underlying reasons for the dynamics between emotion and sensemaking.

Emotions upon ecological change balance the cognitive dynamics created in interpreting the change and complement the sensemaking of ambiguous and uncertain situations (Myers,

2007: 617). Emotion leads to interpretations that balance the current volatile state upon the change, and shape the presumption that individuals draw from ambiguous and uncertain situations (George and Jones, 2001). Hence, the selection of anomalies is to restore an acceptable state regarding one's work role identity, which individuals have prior to the Project.

As discussed in section 7.2.4, the discrepancy between the original work role identity and the assigned work role identity determines whether certain anomalies are taken as sensemaking cues. The valence and intensity of the emotions elicited indicate the selection of certain anomalies as sensemaking cues.

Moderate and intense emotions are more likely to fuel the sensemaking process (Carver & Harmon-Jones, 2009; Walsh and Bartunek, 2011). Since moderate and intense emotions suggest a strong violation of one's work role identity, which requires considerable effort to be restored. The effort is thus used to energise the sensemaking process, which in turn can restore the discrepancy between the original relatively stable work role identity and the current uncertain work role identity. However, the effort to adjust the intense emotions and to restore one's work role identity might be beyond the individuals' ability. This is also echoed by other scholars (Catino and Patriotta, 2013). Catino and Patriotta (2013) find intense positive emotions could lead to automatic processing of information and mindless behaviour, whereas intense negative emotions could lead to a stop in information processing.

Mild emotions are characterised by a rational explanation of the very anomalies noticed. This study shows that people tend to disengage with the anomalies that elicit mild emotions in sensemaking. For example, Laura, as an elite actor, exhibited mild emotions towards staff

turnover and offered a rational explanation as to why staff left. The discrepancy between the original work role identity and the current work role identity elicited by the anomaly i.e., staff leaving, is small, and little effort is required to reduce the discrepancy.

Figure 7. 3. The pattern of role identity, emotion, and sensemaking
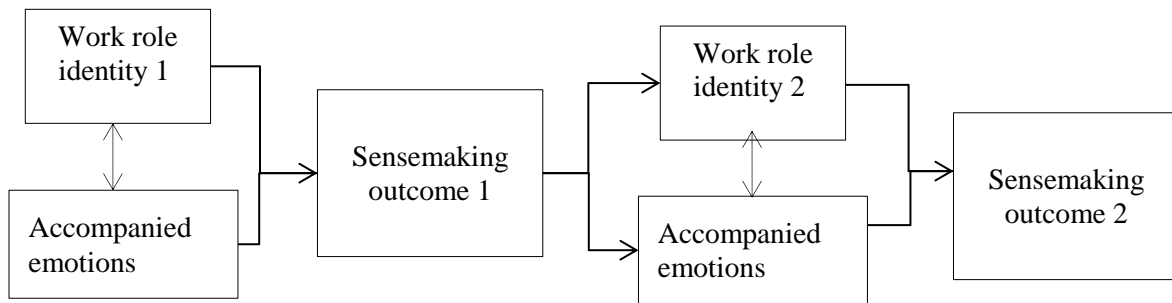
Therefore, given the relationship between emotion and work role identity, emotions accompanied are integrated into the framework of work role identity and sensemaking, as shown in Figure 7.4. The sensemaking of certain phenomena can in turn elicit new emotions and result in new work role identity, and a further around of work role identity, emotion and sensemaking is formed. The process goes on until the work role identity is accepted by individuals and one's sensemaking goes back to unconscious sensemaking.

To sum up, the current study focuses on how individuals' emotions affect their sensemaking. It shows that emotions impact on people's sensemaking via selecting certain anomalies as sensemaking cues. Furthermore, the intensity and valence of the emotions elicited are determined by the level of difficulty to restore to an acceptable work role identity.

7.4. Prospective sensemaking

The previous two sections have focused on the relationship between work role identity and emotions in sensemaking. The following section seeks to discuss prospection in sensemaking.

This study demonstrates the presence of prospection in sensemaking about organisational change. The following section discusses how and why people engage in prospective sensemaking.

Previous scholars argue that prospective sensemaking is an attempt to revise the past so as to align the past self and future self (Gioia *et al.,* 2002). The current study goes further by exploring how and why people align the past self and future self. This study shows that the continuity of core values, attributes, and role set are crucial to align past, present, and future, and concludes three patterns of dynamics between the continuity of one's core values and attributes in the new role and prospective sensemaking.

First, when core values and attributes are enhanced, people predict what might happen in the future based on their abilities to carry out the role. Thus, people in this category might focus more on previous events while predicting what might happen in the future. The prospective sensemaking of people in this category is mostly drawn from retrospection and past-oriented. This pattern is reflected in the two categories within enhanced work role identity, that is, elite actor and active participant.

With an enhanced work role identity, elite actor Laura's prospective sensemaking about the Project changed in Time Period 2, at which time she looked forward to the realisation of a countywide service based on the principles of the Project. Similar to Laura in Time Period 2, active participant Mark believed in the Project, and looked forward to a countywide service. One possible reason for this might be that Laura (Time Period 2) and Mark were involved in the design and management of the Project. Thus, their prospective sensemaking of the future development of the Project originated from their previous involvement of the design and

management of the Project.

Moreover, people in this category showed positively valenced emotions such as relief, satisfaction, enjoyment, and pleased. For example, in Time Period 2 Laura showed enjoyment, and pleased of the anomalies she noticed such as mentoring HAOs to carry out the new role (see section 5.3 Table 5.2). These positively valenced emotions suggest the achievement of tasks and the tendency of wanting more of similar anomalies. Also, the process of accomplishing tasks provides ways to practice one's core activities, which helps to assimilate certain aspects of the new role to one's work role identity, leading to an enhanced one's work role identity.

Second, when people experience threatened work role identity, their prospective sensemaking is more focused on the future prospects of the core values and attributes of their roles. Thus, their prospective sensemaking is more future-oriented. As discussed in section 7.2, there are two categories in threatened work role identity, i.e., disengaged actor and reluctant participant. The disengaged actor such as Helen (section 5.2) envisioned the future of her core activities in the new job while making sense of the Project, and focused on the anomaly that the new role involved doing more admin work. Similarly, the reluctant participants such as Simon predicted his future role being too broad including all the three assessments, i.e., medical, financial, and feasibility assessment, as compared to his previous role which only includes feasibility assessment.

Also, people in this category exhibited negatively valenced emotions such as anxiety, worry, and frustration. For example, in Time Period 1 Simon was worried about carrying the medical assessment (see section 6.2 table 6.1). These negatively valenced emotions indicate that

people face an uncertain work role identity at the time of interview, compared to their rather stable work role identity prior to the Project.

Third, people tend to engage in prospective sensemaking based on retrospective events when they experience mixed impact on their work role identity, similar to people in the category of enhanced work role identity. This pattern includes two subcategories, i.e., accepting actor and ambivalent recipient. The accepting actor Lizzy (CW) in Time Period 1 interview asserted that in one year's time, staff would be able to carry out the new role brought by the Project quite confidently. Lizzy's prediction about the future was based on her assumption that she was able to master the new role (section 6.3 table 6.3). Also, the ambivalent recipient Leo predicted that people would get more experienced and the Project would run better (section 5.5 table 5.4), based on his ability to take all the three assessments. People in this category either exhibited mild emotions or both positively and negatively valenced emotions of the anomalies noticed.

Prospective sensemaking not only help individuals to organise their current life and guide their actions (Gioia and Mehra, 1996), but also justifies current choices and serves to align the past, present, and future, as this study reveals. For example, exposure to the design and development of the Project enables Laura (Time Period 2) and Mark to justify the Project. A successful countywide service also serves as a future dream for them. As I discussed in Chapter 2, the dream building activity discussed by Pratt (2000) allows individuals to think in the future perfect sense and envision a desired future, so as to adjust the activities at present and align their sensemaking of the established distributors.

As seen from three patterns of dynamics between the continuity of one's core values and

attributes in the new role and prospective sensemaking, people make sense of what might happen in the future based on what they choose to observe. Prospection has to draw on cues that exist in one's current knowledge, and is based on previous occurring (MacKay, 2009). When people engage in thinking about the future, existing knowledge is required to start the process. As Gephart *et al*. (2010) point out, the past and the present are essential to provide a context for prospective sensemaking. Prospection takes existing knowledge into consideration, rather than purely focusing on the ambiguous and uncertain future.

Nevertheless, as shown in this study, there is a difference in the extent of knowledge people draw from previous events for prospective sensemaking. When people's work role identity is threatened, their prospective sensemaking is focused on the prospect of valued attributes or activities being reflected in one's new role in the future. When people experience enhanced work role identity or mixed impact on their work role identity, one's prospective sensemaking is much more reliant on previous events.

To sum up, as with the analysis of prospective collective sensemaking by Stigliani and Ravasi (2012), individual prospective sensemaking is based on comparing the core values in one's original role and the prospect of the core values in the future. This study shows the characteristics of one's prospective sensemaking depend on the disparity between one's current work role identity and the original work role identity. Prospective sensemaking is a way to maintain one's core values and work role identity.

7.5. Summary

In sum, the study has found that people tend to notice certain anomalies when engaging in a multi-skilling project. These anomalies are determined by one's work role identity and

prospection. Moreover, different anomalies are accompanied by emotions that have distinctive valences and intensities. The disparity between one's original work role identity and the work role identity associated with the Project, the emotions elicited in the process, and one's prospective sensemaking lead to the selection of certain anomalies as sensemaking cues, which are then taken to inform sensemaking results.

Specifically, work role identity determines how people make sense of a particular change initiative. The current research shows different levels of discrepancy between employees' original work role identity and their current work role identity. The effort required to reduce this discrepancy determines whether certain anomalies are taken as sensemaking cues. This research also led to the observation that emotion plays a crucial part in sensemaking. Emotions elicited in sensemaking indicate the need for identity work, and the intensity and valence of the emotions elicited are determined by the level of difficulty to restore to an acceptable work role identity.

Furthermore, the spiral pattern of the work role identity, emotion and the sensemaking process has been highlighted. This chapter also portrayed that the sensemaking of a change initiative involves several mini-cycles of dynamics between work role identity, emotion and sensemaking outcome.

In addition, the study reveals different patterns of prospective sensemaking. I have found that when people's core values of a role or role set are threatened, their prospective sensemaking become narrowly focused on the future prospects of their core attributes in the new role. The study also shows that when people's core values and attributes of the new role are maintained and enhanced or people experience mixed impact on their core values and attributes in their

new roles, their prospective sensemaking is more focused on previous events and concludes a positive sensemaking outcome.

The next chapter will conclude this thesis by summarizing its theoretical and practical contributions. It also suggests areas for future research, and outlines the limitations of the thesis.

Chapter 8 Conclusion

8.1 Introduction

This thesis set out to answer the question of how and why employees differ in their sensemaking, by focusing on two research questions: 1) How and why do employees engage in prospective sensemaking? 2) How does work role identity affect sensemaking? As mentioned earlier, being induced from data collection and analysis, emotion in sensemaking was also examined, and a tentative model of emotion in sensemaking was developed in Chapter 7 (Figure 7.4).

This chapter is organised as follows. Firstly, I summarise the empirical findings with regard to the above-mentioned research questions. Following this, the theoretical and practical contributions of the study are presented. Finally, I conclude this chapter by offering suggestions for future research and the limitations of this research.

8.2 Empirical findings

The study explains the existence of prospection in sensemaking (MacKay, 2009; Gephart *et al*., 2010) and different patterns of prospective sensemaking are identified. First, where people's core values related to a role or role set are threatened, their prospective sensemaking becomes narrowly focused on the future prospects of their core attributes in the new role. When core values and attributes are maintained and enhanced, people focus on previous events for prospection, since these events helped them to practice their core values and make the new role more acceptable.

This study shows that people who experience enhancement to the core content or context of their role identities are more likely to embrace changes and become active participant or elite actor (Ellemers *et al.*, 2002; Petriglieri, 2011). People's core values or role set of a role may also be threatened, and thus, they may develop a negative sensemaking result, leading either to exiting the role (Petriglieri, 2011) or reluctantly staying with the Project. A further outcome is that individuals might experience both an enhancement and a decrease in their role identity, and form an ambivalent sensemaking result of the change initiative.

The study finds that different anomalies are accompanied by emotions with distinctive valences and intensities. The valence and intensity of the emotions elicited could impact on the noticing and selection of certain anomalies as sensemaking cues. More specifically, people experiencing moderate emotions, whether positively or negatively valenced, tend to engage in the sensemaking process (Maitlis *et al.*, 2013). Moreover, pure intense negatively valenced emotions tend to impede the sensemaking process, and disengage people from sensemaking activities. Mild emotions, meanwhile, tend to produce ambivalent sensemaking, leading people to accept a change initiative, as opposed to actively participating in or rejecting the change initiative.

The selection of anomalies serves to restore one's conscious sensemaking (following the multi-skilling project) to unconscious sensemaking that individuals have prior to the change. This process is not only affected by the disparity between one's original role identity and the role identity associated with the new role, but also accompanied by one's emotions (Hareli and Rafaefi, 2008). Emotions elicited in sensemaking indicate the need for identity work, and the intensity and valence of the emotions elicited are determined by the level of difficulty to restore to an acceptable work role identity.

Figure 8. 1. Different patterns of sensemaking
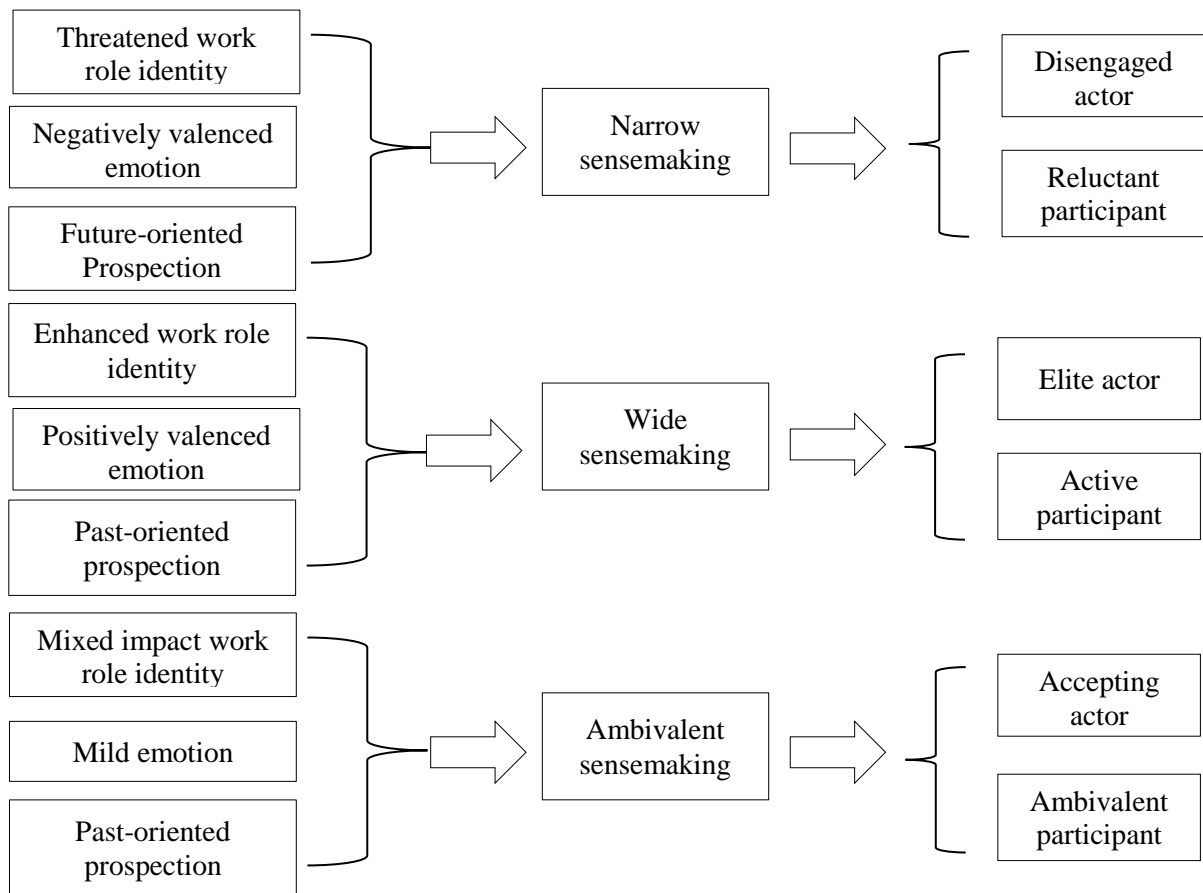
As shown in Figure 8.1, I identify three forms of sensemaking, these being narrow sensemaking, wide sensemaking, and ambivalent sensemaking. The different sensemaking patterns and sensemaking outcomes are formed based on interactions among changes to one's role identity, prospection, and emotions elicited.

Narrow sensemaking exists where people experience dissonance between their original work role identity and the work role identity associated with the new role. This dissonance brings a threat to one's work role identity, and requires great effort to mitigate. People's prospective sensemaking in this category is future-oriented and focuses more on the prospect of one's core values and attributes in the new role. Thus, the extracted cues in this group are gradually narrowed down to emphasize just a few anomalies that elicit negatively valenced emotions.

People's sensemaking cues are more exclusive and immediate in a narrow sensemaking mode. They are less open to alternative approaches to problems compared to people experiencing positively valenced emotions. People experiencing negatively valenced emotions tend to generalise their experience to a negative sphere, which excludes possible positive elements and leads to a negative sensemaking result. Therefore, people in this category resolve to either leave the post, or reluctantly stay in the job and complain while carrying out daily activities.

People engaged in wide sensemaking take almost all anomalies as sensemaking cues. People experience enhanced work role identity in this category, and exhibit positively valenced emotions. Enhanced role identity is reflected in the continuation or enhancement of the norms and attributes of one's role identity, and the support from one's role set. People's prospective sensemaking in this category is more past-oriented and draws more from previous events, since these events enhanced one's core values and attributes in the new role.

These positively valenced emotions suggest the achievement of tasks and the tendency of wanting more of similar anomalies. Also, the process of accomplishing tasks provides ways to practice one's core activities, which helps to assimilate certain aspects of the new role to one's work role identity, leading to an enhanced one's work role identity. People in this category tend to opening up and building resources. People experiencing positively valenced emotions generalise the situation as being positive, and are more open to alternative approaches to problems, thus striving to make the initiative that caused the positively valenced emotions successful (Rafaefi et al., 2009; Maitlis and Sonenshein, 2010). People in this category welcome the change, and become a champion in carrying out the new role.

People from the category of ambivalent sensemaking often exhibit mild emotions or both positively and negatively valenced emotions of the anomalies noticed, and offer rational explanations to happenings brought about by the change initiative. Their work role identities are still in flux. Certain core attributes that they value in their role are enhanced, whereas others are threatened. They might also show mixed emotions toward the anomalies noticed such as the accepting actor. Their role identities might be maintained or protected; however, challenges are brought about by the role set. People in this category accept change ambivalently, and their prospective sensmaking is similar to that of wide sensemaking category, i.e., the prospection is more past-oriented.

8.3 Theoretical implications

As shown in Figure 8.1, the current study expanded Weick and his colleagues' sensemaking framework (2005) by incorporating work role identity, prospection, and emotion in the sensemaking process. This study revealed how and why people differ in their sensemaking of a common experience and contributed to the current literature on sensemaking by drawing up the three different forms of sensemaking, these being wide sensemaking, narrow sensemaking and ambivalent sensemaking. The different patterns of sensemaking are explained by the combined effect of work role identity, prospection, and emotion within the sensemaking process, as shown below.

Research on work role identity has bridged the gaps identified in organisational behaviour research (Ashforth *et al.*, 2008). The current study shows that in the context of changes to people's roles, they notice and select anomalies based on the disparity between the core values or attributes of their initial role identity and the role identity associated with the new role as well as the collegiality of the role set.

This study also develops a tentative model to explain the role of emotion in the sensemaking process. The current research focuses on the role of emotion in sensemaking from an individual level, and points out that emotions impact on one's sensemaking process via signalling the selection of certain anomalies as sensemaking cues. It also shows that emotion is a way for individuals to maintain one's work role identity. The selection of certain anomalies is determined by the level of difficulty to restore to an acceptable work role identity.

The current study also shows that prospection does exist in sensemaking, contrary to some scholars' arguments (Gioia, 2006). This study also extended theories of prospection in sensemaking, arguing that one's prospective sensemaking is determined by the disparity between people's original work role identity and the work role identity associated with the change initiative. People experiencing enhanced work role identity and positively valenced emotions are more likely to focus on past events for prospective sensemaking, since these events enhanced one's core values and attributes in the new role. People's prospective sensemaking in the threatened work role identity category is future-oriented and focuses more on the prospect of one's core values and attributes in the new role. The prospective sensemaking of people experiencing mixed impact on their work role identity is more past-oriented, similar to that of enhanced work role identity category.

Furthermore, scholars argue that people from the professionalised group are more inclined to reject a change that might affect their professional roles, whereas people from the non-professionalised group are more likely to accept the change initiative (Martin et al., 2009; Currie and White, 2012; Martin et al., 2009). On the contrary, this study shows that people from the same professional group might exhibit different views. For example, as a health

professional, Laura and Adele welcomed the Project and excelled in doing the job; non-professionals such as Simon and Elaine developed a negative view of the Project.

8.4 Practical implications

The practical contribution of this thesis is two-fold. First of all, the study of the three aspects of sensemaking, i.e., prospection, work role identity, and emotion, could provide some valuables insights into how employees make sense of a common experience in distinctive ways and show managers how to better manage a change initiative. Secondly, the conclusions drawn from the thesis could be used in other context such as the health and social care sector.

Specifically, this study may make managers aware of the hidden challenges of implementing a change initiative related to changes in employees' roles. Managers need to consider an individual's original role identity and role identity associated with the new role brought by a particular change, and introduce certain measures such as appropriate training courses and senior mentoring, to bridge the gap between the original role identity and the one associated with the new role for a smoother transition (Ashforth, 2001).

Moreover, managers should be aware of the possible emotions elicited, and seek to anticipate and mitigate their effects. For example, managers might introduce a workshop session where employees express their feelings elicited by a change initiative and develop constructive plans (Myers et al., 2012). Also, managers could influence group emotions through social interaction such as group activities and office day out (Barsade et al., 2005).

Furthermore, given the importance of prospection in sensemaking, managers might benefit from strategic planning. Strategic planning allows employees to see clearly what might happen to the organisation in the future, especially under the circumstance of a volatile future

because of modern technology and its unforeseeable implications (McKay, 2009). The blueprint from the strategic planning may serve as a future dream for employees and a driven factor for better performance. Also, managers may construct a past history of the organisation in line with the organisational change that is being undergone (Gioia et al., 2002), so as to justify the change plan and its future direction.

In addition, the conclusions drawn from the present study could be utilised for other organisations in the public sector, such as the health and social care sector, where different staff groups exist. Role changes such as multi-skilling programmes prove to be a major resource in dealing with the ageing population and lack of workers in the health and social care sector (Nocon and Leese, 2004; Bach et al., 2008). Indeed, the escalating ageing population has posed a significant burden on health and social care budgets, and has become one of the top priorities of government policy across the world (Segal and Bolton, 2009).

8.5 Limitations and future research

Scholars in emotion have recognised the difficulty of methodological issues in studying emotion (Sturdy, 2003; Huy, 2012). Emotions in the current study are self-reported in interviews. Although self-reporting of emotions is the most popular way of studying emotions in organisational behaviour research, the approach is criticised mainly for its dependence on individuals' ability to recognise and articulate certain emotions (Grandey, 2008). Moreover, the time when the research was carried out, the Project has been implemented for nine months. Thus, the emotions people expressed at the time of the interview might be distorted from the emotions they experienced at the time of the Project (Robinson & Clore, 2002). However, people remember their emotional experiences especially regarding emblematic stories (Catino and Patriotta, 2013), and therefore, the interview approach to gain people's

emotional responses towards the Project is still valid.

Possible solutions may be to employ different methods such as diary research (Ohly *et al.*, 2015; Grandey, 2008), video ethnography (Liu and Maitlis, 2014) and experience sampling (Beal and Weiss, 2003; Elfenbein 2007), in order to capture real-time emotions and the evolvement of the emotions over time. Nevertheless, these methods might still rely on informants' abilities to recognise and articulate emotions.

Moreover, as a single case study, this research might be criticised for its lack of generalisability, although this study adopted the replication logic of multiple case studies, that is, a replication of observations across groups (Eisenhardt, 1989). One way to address the problem is to gather more data on the Project from the two remaining Councils (Green Borough Council and Black Borough Council). The Project used in this study adopts a theory building approach and extends the framework by Weick *et al.* (2005). Data on the two remaining Councils could serve as a successive case to elaborate and validate the analysis of the current study.

For future research, the Project could be treated as the main subject of the study, rather than using it as a context like the current research. The Project is, in essence, a change programme. Future study can focus on the initiation, adoption and diffusion of the change programme, provided that more data is gathered for the longitudinal study. For example, future research could focus on the facilitators and challenges in initiating, developing and diffusing the change programme (McNulty & Ferlie, 2002; Greenhalgh *et al*., 2004; Hyde *et al*., 2005).

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Appendix 1

Interview questions

	First interviews (8)	Time Period 1 (13)	Time Period 2 (22)
Who	Four Senior Managers (SMs), one Middle Managers (MMs), one OT, one CW, and one OTA	Two MMs, three CWs, three OTs, three OTAs, two line managers	SMs, MMs, all staff
When	Jul. 2012 Aug. 2012	Nov. 2012 Dec. 2012	Jan. 2014 Feb. 2014
How long	Average: one hour	Average: one hours	Average: 50 minutes
Questions	1). Can you tell me the detail of the new role? 2). Where does it come from? 3). How do you implement the new role? What are the barriers in implementing? 4). How do you overcome these barriers? 5). How does the new workforce development diffuse?	1). What do you do now? 2). What did you do before? 3). What's the difference in your job between now and before? 4). What are the aspects you like/dislike about your job? 5). When did you know about the change? 6). Can you describe from the start of the Project to now? 7). How do you feel in each stage? 8). What do you think the whole thing is about? 9). How do you know? 10). How do OTs see the change here? 11). How do the CWs see the change here? 12). How do the OTAs see the change here? 13). What do you think is going to happen to OTs in 12 months? 14). What do you think is going to happen to CWs in 12 months? 15). What do you think is going to happen to OTAs in 12 months? 16). What do you think they are trying to do here? 17). How should it work in an ideal world?	1). What do you do now? 2). What's the difference in your job between now and one year ago? 4). Now going on solo visit, does the job turn out to be how you imagined? 5). How do you think your colleagues get on with the job (HAO)? 6). How do you feel about the HAO role? 7). How about your colleagues? Do you think your colleagues feel the same? Why? Does it affect you? 8). How did you feel one year ago? 9). How about your colleagues? Do you think your colleagues felt the same? Why? Did it affect you? 10). It's been more than one year now. What happened since our last interview? 11). How do you feel about people leaving? Does it affect how you think of the project? 15). What do you think they are trying to do? 16). Do your colleagues think the same? 17). What do you think is going to happen to the Project next year? 18). How should it work in an ideal world?

Appendix 2

Observation summary

	Who	When	What's been discussed
Staff training	All front line staff	9am-4pm (7 hours) 01/11/2012	Casework training
Staff meeting observation 1	Front line staff meeting	14/02/2013 9am-11.30am (2.5 hours)	Weekly staff meeting
Staff meeting observation 2	Front line staff meeting	04/03/2013 9am-11.30am (2.5 hours)	Weekly staff meeting
Staff meeting observation 3	Front line staff meeting	26/04/2013 9am-11.30am (2.5 hours)	Weekly staff meeting
Staff meeting observation 4	Front line staff meeting	12/02/2014 9am-11.30am (2.5 hours)	Weekly staff meeting
Consultation meeting	All front line staff, managers	09/05/2013 9-12 (3 hours)	Meeting distributing the new job specification documents
Conference	5 managers, 2 front line staff	06/06/2013 10am-4pm (6 hours)	The Project Board team presents how the Project improved customer service

Appendix 3

Abbreviation

OT	Occupational Therapist
OTA	Occupational Therapist Assistant
CW	Case Worker
TO	Technical Officer
HAO	Housing Assessment Officer
MM	Middle Manager
SM	Senior Manager
LM	Line Manager
T1	Time Period 1
T2	Time Period 2