



THE UNIVERSITY  
*of* LIVERPOOL

## DOCTORAL THESIS

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“Action Learning Sets to foster organizational learning and innovation”

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Thesis submitted in accordance with the requirements of  
The University of Liverpool for the degree of  
**Doctor of Business Administration (DBA)**

**By**  
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*March 2023*



## **DECLARATION and ACKNOWLEDGEMENTS**

I declare that this thesis was composed by myself, that the work contained herein is my own except where explicitly stated otherwise in the text, and that this work has not been submitted for any other degree or professional qualification except as specified.

This thesis embodies lessons of lifelong learning instilled in me by my parents and family.

A note of gratitude to my friends, colleagues and my supervisor  
who have been sources of support through this discovery.

Above all, this is for my kids who remain my source of curiosity and inspiration.



## ABSTRACT

“Action Learning Sets to foster organizational learning and innovation”

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Organizations strive to offer employee learning opportunities and instill innovation practices, yet few exercises are found to be deliberately embedded in everyday routines. Based in an educational institution, this study concerns a group of faculty and staff of a specific department in a Community College (in Ontario, Canada), and creates a structured opportunity to afford habitual organizational learning practices rooted in Action Research. This study implemented an Action Learning Set to investigate how learning occurs when employees willingly participate and consciously create collaborative conversations over time. Existing work in the realm of Action Learning are intentionally considered to make this qualitative study more meaningful. Action Research is used as a required methodology of my DBA endeavour and also becomes a foundational basis for the tool itself i.e. Action Learning Set, thus making it a unique arrangement from a scholar-practitioner perspective.

Set exchanges focus on individual and group dialoguing using action research spirals and these interactions are carried into a virtual environment as well, to trace the lived experiences of the group. In assessing the synergy created via such action, the study goes a step further to connect tacit theoretical understanding of action-based learning with the notion of *Hot Groups*, known for its spontaneous, creative and determined sense of purpose. Journal notes, observational field notes, and a debrief survey involving post session sharing generated rich data and these information sources were coded, analysed and interpreted as common themes for discussion.

The Action Learning Set is a shared space that becomes a vehicle for participant insight to learn more about themselves, their peer and their organization. With the confluence and commonalities of action-related notions, and certain unprompted movements that were observed, this study also throws light on participants who worked together, how or why they chose those paths, and what circumstances contributed to such decisions in working and learning as a team or independently. Therein, the research uses multiple cycles of Action Research to identify new knowledge, understand and explore findings, and cultivate stronger organizational learning and innovation practices.

It is argued that unless a planned method to navigate and nurture exists, learning often remains disjointed or in silos. An intentional process can manoeuvre, and curate insight otherwise confined to cubicles. Actionable knowledge from this thesis points at organizational needs including structured, mindful learning engagements and creation of shared spaces, especially within the community college framework. It is also reflective of what emerged from using an Action Research-based methodology, i.e. having a disruptive mindset to embrace innovation, awareness of organizational politics and those who endorse such thinking, virtualization of Action Learning Sets and use of technology to nurture seamless dialogue. This thesis underscores the value of tangible processes in engaging stakeholders through mutually beneficial learning and innovation practices, in tapping into leaderful behavior of organizational members, and the ways in which this knowledge can contribute to future projects for scholar practitioners, as a model within the post-secondary landscape.

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## CHAPTER 1: INTRODUCTION

In a world of constant flux, organizations are faced with increasing complexity and challenges as they adapt or learn to keep up. Individuals imbibe and implement organizational norms with an inherent expectation to initiate and inspire leaderful practices and keep the wheels of innovation moving. But sometimes our eyes miss what lies directly in front of us and we fail to look at some of the shifts as an opportunity (Brown and Osborne, 2012, Tsoukas and Chia, 2002). Many organizations do not intentionally pause and reflect as regular practice, or tap into internal competencies in the process, and proactively reinvest in existing expertise or talent therein. The resultant oversight presents an enormous opportunity to revisit habitual organizational norms, culture and development factors or exercises including employee engagement and leadership, communication and synergy, or innovation and learning practices.

This chapter introduces my research focus that is a reflective exercise using tenets of Action Research (AR) to stimulate and support practical outcomes (Guertler et al, 2020). It starts with an overview of workplace setting and study backdrop that led to the development of a tangible framework implemented with organizational stakeholders. References to subsequent chapters are interspersed in this narration that also includes the research statement. This is followed by an overview of the main concepts of the research question, my role(s) in the organization and this study itself, and the value of this study.

## 1.1 RESEARCH FOCUS and RATIONALE

Habitual learning amidst ongoing or daily organizational commitments is not always natural. Even if a few organizational members show genuine enthusiasm or creativity, some may continue to mull over their thoughts and ideas in isolation. So, how can the practice of harnessing ongoing learning and innovation, become a routine organizational undertaking? I seek to know if and how individuals come together consistently and methodically for the sake of their own reflective practice and as a group exercise, for organizational level impacts, such that they are felt tangibly, positively and collaboratively over time.

### **Workplace Landscape**

Set in a Community College in Toronto, Ontario, Canada, the organization researched in this study provides ample scope for learner-centric activity that can nurture innovation and learning. To begin with, it is worth noting some of the provincial and political contexts here. Post-secondary education sector in Canada and specifically Ontario, comprises public universities, public colleges and hundreds of registered private career colleges, all vying for equal attention from an increasing number of international student population that has tripled over the past decade and only continues to grow (StatCan, 2020). This is thanks largely to the federal immigration policy that welcomes volumes of tax paying skilled workforce and students to align with its multicultural policy. Since the Canadian Multiculturalism Act, 1988, this country has evolved into a post-national, multicultural society, home to the globe across its length and breadth, flaunting its two international languages (English and French) and its diversity as comparative advantage in sourcing creativity and innovation. This influx of student enrolments into the Canadian college

system is driven by several factors, including the country's reputation for high-quality education, diverse range of programs, and welcoming culture. Post-graduation employability policies along with vocational and career-oriented programs have also made colleges a huge magnet. Thus, multiculturalism in Canada has progressed from a mere model to an official policy, and Ontario mirrors the rich cross section of this growth over recent years allowing students to travel, study, work, live and thrive here.

A conscious effort in Ontarian organizations has been to embrace and reflect a diverse and inclusive workforce with an array of identities, abilities, backgrounds, cultures, skills, perspectives and experiences, representing local, provincial and national levels of contemporary and embryonic population (Christus-Ranjan, 2018). Filtering down to the specific study context, as one of Toronto's most renowned (publicly funded) Community Colleges my organization has recognized student diversity by formalizing its operations and core values through its work in Global Citizenship, Education and Inclusion (GCEI), applied research and innovation, working collaboratively with stakeholders, engaging meaningfully via education, and ultimately transforming the lives of its communities.

To this end, my empirical study is focused on organizational learning practices. It explores the lived participant experience of organizational employees collaborating as an Action Learning Set (ALS) model and how it is associated with the spontaneity of Hot Groups that are known for their innovative spirit (Lipman-Blumen and Leavitt, 1999) and result-oriented thought-action loop practice (Argyris, 1993). If and how the ALS can serve as a catalyst to breed informal Hot Groups (Bacharach, 2014) so they readily function over a period and achieve common targets as

comrades in adversity (Attwood, 2007), is also investigated. There is an organizational push for personal and professional learning and development and so, AR becomes an amenable way to get to the root and encourage participants to engage, reflect and respond more purposefully.

### **Study Backdrop**

By way of observation and brainstorming with colleagues, the framing of this workplace opportunity stems from my position(s) as a faculty and insider researcher in my specific department, and this is in the context of ongoing change and employees being *disengaged* (as noted by Kahn, 1990). An initial ALS (Appendix A) hosted by the institution's Centre for Organizational Learning and Teaching (COLT)'s Community of Practice (CoP) cohort provided me with preliminary insight. Herein, a group of employees pursuing graduate studies met in person, to begin the initial cycle of 'observe-reflect-plan-act' loop that is typical of AR projects (Argyris, 1993). The resultant feedback, request for subsequent meetings and spontaneous network creations that occurred thereafter, affirmed my belief that there is room for more critical and collaborative problem identification and solving across the organization, and an opportunity to tap into the creative synergy that sometimes goes unnoticed.

This is based on the premise of scenarios when employees grapple with ongoing work or projects, a common platform or Learning Set can be convened to co-solve and unravel wicked issues; just like a Hot Groups setting where “tempered radicals bring infectious attitude to incite innovation” (Attwood, 2007, p.193) and subsequently instigate a domino effect. I put forth a proposal to recruit employees willing to share common challenges faced at the workplace. Participants were organizational colleagues, who volunteered to engage in a systematic, organized format and

were new to the collaborative spirit of ALS. Despite knowing one another, they had not necessarily been provided avenues to jointly address nagging workplace issues or venture on projects of mutual interest using a guided framework. As well, owing to lack of focused time and nature of role (faculty and support staff with conflicting or overlapping schedules), coming together, itself, was a welcome prospect. This was because, department wide meetings were usually once a semester, typically convened by management to prepare for the new academic term and with a general purpose to efficiently kick start semester related affairs. Additionally, I found the commonality of navigating issues as Set comrades would make it a curious but safe setting for all to try and focus on individual and group needs as a start.

## 1.2 CONCEPTUAL DEVELOPMENT

Employee engagement remains the single most powerful factor indicative of an organization's wellbeing (Anitha, 2014) and the multi-dimensional definition of the term also led me to consider the opposite in order to probe deeper i.e. Kahn's (1990) notion of 'disengagement'. Using a proactive lens to assess organizational communication, tenets of leaderful practice and experiential education, I considered possibilities to shift from theory (*know what*) to practice (*know how*) to critical reflective knowledge (*know why*) (Raelin, 2009). This process seemed closely aligned with the Ladder of Inference technique (Argyris et al, 1985, in Coghlan and Brannick, 2014) discussed later in Chapters 4 and 5 when speaking to action spirals and the stories therein.

Through the foundational years of my DBA, my fascination and intrigue with Hot Groups has grown, specifically, how out-of-the-box energetic innovation can synchronize with pragmatic and reflective organizational exercises such as the ALS. Hot Groups are defined by their spontaneity of “diverse but compatible achieving styles” (Lipman-Blumen and Leavitt, 1999, p. 64). This study explores the linkages between ALS and the creative innovation streaks of a Hot Group and this is discussed more in detail in Chapter 5.

With lines of thought entrenched in Argyris’ and Raelin’s inspiring and still relevant works, I opt for a constructivist-pragmatism perspective to seek answers to management innovation puzzles and this is described in the study design in Chapter 3. I sought not just to clarify, but eventually to alter the situation, myself and others, to higher learning (Argyris et al., 1985, in Friedman, Razer and Sykes, 2004). Clearly, the process results in a painstaking, yet necessary route of oscillations and upward movements towards desired equilibrium (Paraskevas, 2006) that defines the reframing of what I *must* know (Cresswell, 2013). And this brings us to the research problem and statement of this study.

### 1.3 PROBLEM IDENTIFICATION - Research Question

The mainstay of an Action Learning (AL) experience starts with the awareness, identification and ownership of a wicked issue, one that willing leaders must often tackle (Edmonstone, Lawless and Pedler, 2019). This study is concerned with using structured processes to induce such reflective exercise in organizations so members learn and thrive.



## RESEARCH STATEMENT

### **“Action Learning Sets to foster organizational learning and innovation”.**

The AR question that emerges from this is framed as -

*“How does participation in an action learning set influence both employee learning and organizational learning within a community college?”*

This question explores inherent curiosity or collaborative spirit housed in institutional best practices or lessons learned (Pyser and Winters, 2018). An educational institution can lend itself as a potential learning organization with the capacity to adapt to evolving situations and collaboratively learn new ways (Kools and Stoll, 2016). An environment that can reinforce strengths-based brainstorming to reinvent leadership, innovation, and engaged group behavior can also support collaborative creativity, authenticity, diversity of outcome, and trustworthy social interaction of Set participants (Allan, 2010, Herrington et al, 2003, Pedler and Abbott, 2013). The study aims to draw in those strengths and make it a converging point for concepts such as ALS and Hot Groups to work in tandem and explore organizational synergies in the process. And this would be worth exploring for both, individuals and those working as groups from an organizational standpoint.

## 1.4 CORE CONCEPTS

While Chapter 2 critically examines relevant literature, this section skims key elements of the Research Statement, their inter play, connectedness and individual impacts on the study.

## **Action Research**

Simply put, the research of self-experience (McLaughlin and Ayubayeva, 2015) and a tangible journey that involves identifying, owning and taking action to resolve a situation (Greenwood and Levin, 2007), Action Research (AR) focuses on the knowledge produced from within as a result of action and reflection iteration process (Dilworth, 1998). How AR empowers this study to explore an issue, try an intervention and learn from it holistically is expanded in Chapter 4. AR is both, an operational requirement for DBA and ties in closely with the research tool in this study.

## **Action Learning**

An early 1930's revelation, Reg. Revans explained that questioning beyond programmed knowledge yielded higher learning, pushed by a desire to innovate than mere talk (Pedler, 2019, Raelin, 2011). Learning occurs by doing (Pfeffer and Sutton, 2000), in being *with* and *from* each other (Revans, 1982), when confronting wicked situations (Trehan and Rigg, 2015) and even when 'working together apart' or virtually (Dickenson, Burgoyne and Pedler, 2010), as we have seen, in the thick of a global pandemic. Action Learning (AL) is an essential component that powers my research statement and study process, both in person and online (by way of a Virtual Action Learning Set or VAL). It provides a practical vehicle to nurture learning for those involved.

## **Action Learning Set**

Creating a conducive environment for learning and establishing collaborative pathways, Action Learning Sets (ALS) are the hallmark of AL agenda (Pedler, 2017). The foundations of a Set are the willingness to convene, experiment, support, dialogue openly, confidentiality and the ability

to co-create for individual and group benefit (Coghlan, 2001). Set participants are known to function as companions in iterative cycles and learn best when together (Boshyk, 2016). The ALS is a vehicle for participants, a self-guided mechanism that contributes to data, as well, their own purposeful probes in the journey of discovery.

### **Appreciative Inquiry**

Capitalizing on *what is* and moving that to a *what if* is the essence of Appreciative Inquiry (AI). Described as a practical mind shift, AI trains viewers to be more aware and create feasible links to change the subject and thereby change the organization (Cooperrider and Whitney, 2011). A strengths-based model, to foster concerted organizational change and development, AI is the silver lining often missed when confronted with insurmountable situations. Using a phased approach during each AR iteration, the 4D cycle comprising *discover, dream, design, deliver* comes to play (Cooperrider, Whitney and Stavros, 2003).

### **Hot Groups**

This intriguing term relates to small, lively, high-achieving, dedicated groups within organizations with an infectious energy and goal-focused behaviour (Lipman-Blumen and Leavitt, 2009). The authors note how Hot Groups are self-led individuals often thriving and feeding off each other's creative and indomitable spirit. Their inbuilt momentum provides impetus to go places and in its core is a unified belief and work ethic that elevates everyone with it, beyond organizational politics and resource barriers. It is argued in this study that some ALS members who behave like

those in a Hot Group could respond to constructive ALS debates and thus model the potential change that is waiting to occur (Coghlan and Brannick, 2014).

### **Organizational Learning and Innovation Processes**

While it may bode well to claim that spontaneous interactions often lead to the best of innovation or unintended discoveries, the element of spontaneity itself maybe somewhat lacking. As per German feminist action researcher Maria Mies (cited by Chisholm, in Herr and Anderson, 2014), social engineering or intentional effort to rope in those with genuine keenness for change making practices is employed as an intentional approach in this study. The ALS structure could provide a safety net, and simultaneously a purposeful space to break organizational monotony. This combination of orchestrated intervention and disruption could potentially support organizational alliance within the nucleus of an innovative learning system (McNiff, 2017, Revans, 2011) thus aligning the notions of ALS and Hot Groups to sustain and enhance learning moments.

## 1.5 MY ROLE AND POSITION

As a full-time faculty, I am typically engaged in classroom instruction through the academic year, as most of my faculty colleagues are. In addition, and owing to my research and project management interests, I have, over the years, remained involved in non-teaching work and academic programming as well. These include special events and publication, applied research, scholarship of teaching and learning, reviewing research ethics protocols and offering mentorship and support to institutional researchers and my peer. As faculty in a community

college, I report to my Chair (management) and thus my level of authority and influence is restricted to assigned projects each academic term. As an insider researcher whose portfolios often intersect with those of my colleagues' who maybe participants in my study, I needed to constantly overcome pre-conceived notions by sharpening observations and being in tune with my environment (Weick, 2002). An awareness of my biases and assumptions and routinely balancing this with political acumen, entrepreneurship, and change ownership has been critical. I also considered the reality of possible organizational silence on part of some participants, and authentically interpreting observations to process any possible layered thinking on my part (Bjorkman and Sundgren, 2005, Morrison and Milliken, 2000).

My role conflict is ongoing and elaborated in Chapter 5 using critical reflexivity. I am mindful of it, and over time, this has evolved into the objective and reflective sides of becoming a scholar practitioner (Coghlan, 2001). There is an increasing comfort with role ambiguity and the associated tentativeness within because one has to walk this fine line (Raelin, 2009). Storytelling and sensemaking can become two sides of this coin as shared by data from my *journal reflections* and *field notes* in Chapter 4. The practice of argumentation and voicing inner thoughts refines critical thinking (Gold et al, 2002), a conscious routine for researchers who must wear different hats in a study. And to be able to facilitate and interpret this process for organizational learners and practitioners made it engaging for me all the same.

## 1.6 RESEARCH VALUE

This section outlines key areas that add value to the nature of this study, correlating to Chapter 6 where actionable knowledge is explained in more detail.

### **Social Inquiry, Ownership, Learner-Centric**

This study proposes that AR can have authentic impacts within an organizations and specifically for a community college set up. From providing all players a voice, to cultivating an inquiry mind set, to stimulating development and change, it allows deep learning with accountability (Shani, 2021). This form of undertaking can empower educators to better articulate choices they make, and about methods they use, even if they are challenged, seem irrational or deviant. The exercise remains learner-centered with discussions about oneself; crucial for improvement of a learning institution (Pedler and Hsu, 2019) and being attentive to evolving knowledge and beliefs. In an education milieu, members must author their own research and actively contribute to co creation, thus powering a holistic system change (LeGeros, 2018). Being job-embedded, ALS' reflective pedagogy can strengthen participants and working relationships (Middlehurst, Cross and Jeannin, 2017).

### **Power play and Nurturing leadership**

Within sets, facilitation is concerned with supporting the learner in challenging or changing the discourses that generate positions of marginality. Equally important is the capacity to illuminate the ways in which participants resist, or reinforce, power relations that develop from learning inaction (Trehan and Rigg, 2015). Democratizing research and educational practice in AR are

paramount, making room for respect and professional interface with colleagues and peer alike (Leykum et al, 2009). If interventions can map and absorb interactions through visible impacts or inherent synergy, they could point to insightful moments making the ALS a tracking tool for ideas that incubated and later took flight, or those that remained latent in the ideation stage and needed further thinking. Sensemaking tools can guide and support passive leadership. It can condition budding leaders to tap into programmed knowledge and simultaneously incorporate versatile questioning or creative methods (Antonacopoulou and Bento, 2004, Marquardt, 2007). AL can thus be a catalyst to shape leaders who may learn while working (Volz-Peacock, Carson, and Marquardt, 2016).

### **In Person and Online Collaboration**

We are all naturally researchers, even without knowing it when we try a new strategy or adapt as required; AR just formalizes this intuitive behavior (Duesbery and Twyman, 2019). This modification correlates with Argyris' call for creative approaches to problem solving as a unique way to look at hurdles as opportunities, to improve organizational practices in a sustainable and effective manner (Argyris and Schon, 1978). This investigation intersects action-based entrepreneurship with Virtual Action Learning (VAL) components to convene geographically distributed workforce more cohesively (Byrd, 2019, Gielnik et al, 2015). Using technology as an enabler, AL in a virtual context stretches critical skill sets of everyone in the 'room'. The power of interactive and collaborative communication technologies allows informal, flexible, adaptable

and continual connections and interface (The VAL Guide, 2012), especially true with working remotely during and since the pandemic.

### **AL Revisited and Extended**

As a process where a small group works hands on, confronts real problems, takes action, and learns on multiple levels, AL nurtures creative, flexible and successful strategies (World Institute for Action Learning [WIAL], n.d., in Volz-Peacock, Carson and Marquardt, 2016). As per Revans (Pedler, 2017), a practice such as AL can generate dynamic prospects with a learning catalyst like the ALS. This thesis offers a combination of closely related components, i.e. people, problem, learning set, but, in a different concoction with the fluidity of variable interactions among Set members who are not always confined to its boundaries. It embraces learning for both organizational and self-development, yet the action taken can change course by introducing spontaneity among connected leaders i.e. ‘combustible agents’ such as Hot Groups at play (Lipman-Blumen, 2000).



## 1.7 SUMMARY

The journey into the core of organizational interaction and learning is a more convoluted pathway than imagined. Just because insider researchers have a somewhat obvious advantage is presumptuous because looking at the conundrum while being part of the mess is never easy. It takes conscious effort to absorb yet stand aside and gain deeper understanding and appreciation of its people and processes. This journey began with what seemed to be a simple quest to find collaborative answers to organizational issues. However, what is uncovered over the years of critical observation, first-hand experience, doctoral field work and interpretation are alternatives stemming from real time reflection of the unknown and the untapped.

Such is the power of decolonizing the mind when using a systematic process of *learning, unlearning, relearning* and willingly engaging in a mindful way (Lopez, 2020). A learning organization breeds those with the aptitude to cultivate this principle as a personal virtue, much less a management mandate. The subsequent chapter discusses the review of literature and how I could focus on managing and transforming collaboratively created knowledge into learning and innovation possibilities for organizational purposes (Ayuso et al, 2011, Widén, Olander and Atkin, 2013).

*“The illiterate of the twenty first century will not be those who cannot read and write, but those who cannot learn, unlearn, and relearn.” – Alvin Toffler, Futurist and Writer.*

## CHAPTER 2: LITERATURE REVIEW

### INTRODUCTION

This chapter covers critical literature that has helped me scrutinize and better understand my organizational workplace problems. Being guided by the pragmatism of theoretical underpinnings of concepts while adopting a scholar-practitioner balance, has allowed an emphasis on the framework's core i.e. how action and learning are central to my research statement and integral to the study as an AR methodology. The chapter begins with a description on the search strategy employed to source existing material and then proceeds to discuss the study backdrop, alignment of interconnected terminology and creation of a guiding framework. Some challenges encountered, my position in relation to the gaps found in the process of literature review, and potential outcomes are also considered.

### 2.1 SEARCH STRATEGY, SOURCES, BACKDROP

The keywords for the literature search included elements of the research statement: "*Action Learning Sets to foster organizational learning and innovation*" i.e. Action Learning (AL), Action Research (AR), Action Learning Set (ALS), organizational learning, innovation. In addition, the sub-question "How does participation in an action learning set influence both employee learning and organizational learning within a community college?" afforded some other areas to explore including terms such as *organizational learning in community colleges, change, intervention,*

*diversity, inclusion, engagement, leaderful behaviour, virtual action learning (VAL), workplace synergy, and hot groups.*

Databases from University of Liverpool's Directory of Open Access Journals, Emerald Insight, Journal Storage, SAGE encyclopaedia of Social Sciences, scholarly periodicals, and similar sources were used in this exercise. Original works were combed for definition, and contemporary and current articles were also taken into consideration to make my literature review relatable and relevant.

While notions like AR, learning sets, and organizational learning originated in seminal work since the 1930 or 40s, their influence and relevance endure even today, in highly cited publications and real-world improvisations. The review values diverse ontological and epistemological assumptions providing a foundation to reflect on existing knowledge, consider my perspectives and suggest alternatives (Greenwood and Levin, 2007). Material was sourced from leading academic journals, specialist journals, actively used and frequently quoted practitioner materials. As Pedler (2011) aptly advocates, the literature review also includes books, papers and works that have made a difference to me in this journey.

The fields of nursing and education have led the way in AR projects (Herr and Anderson, 2014, Williamson and Prosser, 2002), with recent work in digital revolution, virtual learning and related business applications having added newer dimensions. Peer reviewed journals, works of pioneers, coupled with human resources and general management specific publications, and articles offering debates have been combed to further inform this exercise as they relate to industries across the education realm.

This section first discusses the community college setting and context that necessitated the deliberation of such a study and proposed action. It begins with factual workplace information, inherent dynamics, and proceeds to consider relevant literature in the light of organizational learning as it relates to my own research statement and how an AR approach may fit in.

## 2.2 ORGANIZATIONAL LEARNING IN COMMUNITY COLLEGES

Set in an Ontarian Community College, this is an experiential workplace investigation. Steeped in an educational context, the organization positions itself as being learner-centric, nurturing reflective teaching and learning practice that faculty are routinely encouraged to undertake with their managers, typically once a semester. This sometimes serves as a check in and a means of performance review mechanism to update the organization on most recent accomplishments or professional development activities engaged in. Staff have their own process of organizational performance review. Thus, it operates more in silos or a one on one context for employees with their immediate supervisor.

A need for curiosity and to stay current in the realm of teaching and learning made this population amenable to experiment with learning methodologies. The framing of this workplace issue stems from my unique position as faculty and insider researcher when observing change and participant experiences. Employee engagement remains a powerful indicator of organizational wellbeing (Anitha, 2014) and exploring its opposite, i.e. disengagement (Kahn, 1990), led me to consider organizational communication, collaborative tenets of leaderful practice, experiential education, and to shift from theory to critical reflective practice (Raelin, 2001, 2009).

In looking at literature that deals with organizational learning and related exercises in community colleges, the area of organizational learning remains under explored and it points to the need for more experiential outcomes to inform this part of the study (Dee and Leišytė, 2016). What is found prevalent in several higher educational institutions however, is a conscious and long-term use of deliberate structures reflective of an intentional learning mindset (Webb, 2018). Jones et al (2014) observed that colleges typically use a variety of purposeful processes, i.e. administrative and more specialized ones such as strategic planning or review committees to engage in organizational learning. This is true for studies wherein conscious interventions supported by robust, proactive and transparent internal communications and a collaborative spirit of inquiry have resulted in genuine stakeholder engagement and interest over time (Purcell, 2014, Webb, 2018).

Furthermore, Kezar (2005) suggests that organizational learning is beyond a fad in higher education, and that additional hands-on work in this area can push our understanding of how learning occurs within such institutions (Dee and Leišytė, 2016). This is corroborated by Purcell (2014) and Stewart (2006) who recommend further research to understand how we institutionalize group learning and engagement processes, specifically in community colleges. Their works indicate that organizational learning is not as extensively explored in the context of higher education, as compared to say business, government or healthcare. Examining how learning occurs or how such knowledge is acquired, interpreted and accessed for later (Stewart 2006) becomes an integral component of learning itself, both for individuals and the organization as a whole. This is further emphasized by the fact that learning occurs through examination of mistakes and use of cross-departmental groups in higher education set ups (Kezar, 2005). It is

worth nothing that Canadian community colleges have been associated with a ‘lifelong learning culture’ that is flexible, creative, and responsive to the communities it serves (Gallagher and Day, 2001). If a workplace such as mine can explore effective learning networks, then realistically, the idea can permeate to broader, diverse ecosystems as well. The desire to engage, lead change projects by creating conducive learning conditions, take more initiative and risks, develop a culture of innovation and prompt creative solutions (Pedler and Abbott, 2013), each resonate with ideas of organizational development and innovative critical thinking.

### 2.3 MY APPROACH - ‘ACTION’ Items

This section deals with the fascinating realms and characteristic harmonies of AR and AL within the ALS context. Combined, they bring out the commonality of ‘action’ with a layered purpose: one, for scholar-practitioners to embrace and apply in their worlds, and two, to be scrutinized as study methodology and tool, respectively. Not only am I using AR to undertake the task, it is implemented as a means to spur organizational learning, making the literature review rich from both academic and practical standpoints. Brannick and Coghlan (2007) identify three clear research streams (quantitative, qualitative, AR) as available paradigms. As dismissive as many may be of narrative storytelling and related qualitative approaches, social interaction and iterative exercises are fundamental to AR (Greenwood and Levin, 2007). The following discussion is the foundational review of literature of this notion, highlighting its merit, followed by a critical linkage among the terms that bring them together as meaningful catalysts in my study.

## OVERVIEW OF CONCEPTS

### Action Research

The fact that academics undertake AR is testimony to its growing demand in numerous sectors (Pedler and Abbott, 2013) and its undisputed presence in mainstream literature alongside institutional reflective practice and practitioner research (McNiff, 2013). Transitions involving ideas integral to organizational well-being reflect an element of research *in* action than research *about* action (Coghlan, 2014). A Russian instructor fittingly describes AR as ‘the research of self-experience’ in a study involving educational reform (McLaughlin and Ayubayeva, 2015). AR mirrors systems improvement, co creating whilst problem solving, or effective learning by assembling existing skills along with new knowledge generation (Greenwood and Levin, 2007). Such opportunistic research (Coghlan, 2014) can alter an event into democratic confluence of action and reflection, including exploration of online learning and teaching through research into practice and experience (Brydon-Miller et al, 2003, Salmon, 2016). AR’s focus is on knowledge produced from within the action, while in action (Pedler, 2016) and participant awareness of organizational paradigms and individual beliefs as rich outcomes of the holistic process (Norman and Powell, 2004). In a nutshell, AR can be viewed as a scientific process rooted firmly in the philosophies of this undertaking to satisfy the twin purpose of learning based on action and contribution to the body of knowledge (Greenwood and Levin, 2007).

### Action Learning

The lofty ambitions of AL (set by Revans) went beyond individual development, to embrace both organizational and social renewal (Pedler and Abbott, 2013). The house of AL developed on Reg

Revans' foundations in the 1930s. Its essence that was captured in the equation  $L = P + Q$  (Learning = Programmed Knowledge + Questioning) gave the world the basic idea that organizational development can flourish when rate of learning (L) is equal to or greater than rate of change (C). The guiding philosophy here, embraces the human urge to discover if something works by trying it than pursuing empty debates (Revans, 2017, Raelin, 2011). Change starts to occur when applying the knowledge that one acquires i.e. learning by doing, versus reading, listening or thinking (Pfeffer and Sutton, 2000). That 'learning involves doing' was propounded in 1945 by Great Britain's Mining Association advocating a staff college with workplace problems to learn *with* and *from* each other (Revans, 2017). This was not a traditional instructor led classroom, but a mutual collaboration and an open dialogue. What makes AL fascinating and relevant to this study, is its characteristic assumption of taking action. By tackling needs more proactively and using that experience to instil confidence, the experience can become self-transforming, and a learning system in this exercise (McNiff, 2013, Revans, 2017).

AL is often described as a way of life with and from others, whilst confronting wicked issues. The idea of Critical Action Learning propounded by Willmott (1994, in Trehan and Rigg, 2015) is an extension that combines critical thinking and management learning. Recent and emergent forms of AL include the virtual version with a strong orientation to application, like business-driven AL that involves senior executive sponsorship with a stipulated initial step of  $L > C$  (Boshyk, 2016). It would be unrealistic to resolve urgent, critical issues within weeks simply by partaking in an ALS (Waddill, 2006). But for a group torn apart by logistical challenges in my organization i.e. disparate schedules (classroom teaching, work commitments) and factions of old versus new



hires, the idea of 'working together apart' or virtualization as a new organizational lifestyle is factored into my study (Wilson et al, 2021, Kools and Stoll, 2016, Ratcheva, 2008).

The bringing together of geographically dispersed individuals is a huge practical advantage of VAL as a rampant technological tool, in the network learning arena with every learner being a node (Dickenson, Burgoyne and Pedler, 2010, Salmon, 2013). 'Work Based Learning' is also being increasingly integrated with AL and VAL as live projects offering reflective lifelong learning (Lester and Costley, 2010, Raelin, 2000, in Gray, 2001). These digital exercises not only harness the strength of exercising influence continually (Kools and Stoll, 2016), but afford rewarding innovations with professional and personal development in building competency, thus shaping corporate philosophy, organizational strategy and synergy (Shanahan, 2018). VAL can draw active group learning while being rooted in learner-centred and technology-enhanced design (Boshyk, 2016, Salmon, 2016). Curating virtual content from in person ALS and continuity of discussion on commonly shared issues (Radcliff, 2017) are other contributing factors to VAL's success that are included in this study design. Integration of learning around lives sans time or location constraints further establishes the constructivism philosophy of knowledge generation from an experiential understanding (Huang, 2002).

### **Action Learning Set**

Described as the cutting edge of every AL program (Revans, 2017), an ALS provides the motive to share, exchange and become aware of existing knowledge, organizational best practices, and acknowledge business needs or individual positions, and strategically further those requirements (Norman and Powell, 2004). The authors argue that Sets empower participants to clarify organizational patterns compared to their beliefs, and this dynamic interplay informs next steps.

As a small group of colleagues meeting regularly to help each other act and learn (Szabla et al, 2017), the ALS' foundational premise is to first admit a need to learn, then be willing to experiment and become interconnected while being entangled (Saunders, 2014) - a risky proposition that leaves behind fear and distrust - to create a conducive and innovative learning climate instead (Pfeffer and Sutton, 2000). An ALS authorizes unique powers of personal relationship and therapeutic assurance to confidently ride the tide with colleagues (Norman and Powell, 2004, Attwood, 2007). The use of ALS in my study can intentionally immerse learners by demanding their intellectual and practical knowledge to help resolve issues faced (Gray, 2001, Herrington et al, 2003). Listening (versus speaking) can help participants to decipher what is said, and more importantly, what is *not* being said, making the forum a viable and safe bouncing board for participants in this venture (Heywood, 2020).

## 2.4 COMMONALITIES of AR, AL, ALS

Action based learning is popular in organizational development and management education thanks to evolving research avenues with a learner centric approach; a stark contrast to outsourcing consultants (Pedler, 2016). The ALS is a vehicle for AL to occur and remain integral for AR, which in turn helps to validate the learning within. Outlined below are some of the widely accepted cornerstones of this process, along with shortcomings as visualized by me in Fig 2.1. The ideas of questioning, ownership, leadership, mindfulness and reflexivity are first explained, as hallmarks of such a framework. The centre is shown as being rooted in 'action' that is connected to AR, AL and ALS, and to Hot Groups that later emerges as an evolution of this

process. Finally, there remain some challenges like time, politics, inaction or creativity (denoted by a question mark to the far right).

This section highlights the common values across notions emphasizing how AR is both value laden and value driven (illustrated by the left arrow in Fig 2.1 that symbolizes the learning therein).

**Questioning - *democracy, diversity***

The refusal to separate thought from action embeds democratic inclusion of participants versus accepting preconceived decisions from authority (Dewey, 1976, in Greenwood and Levin, 2007). Diversity and conflict become essential ingredients of working through disagreements to improve situations (if not resolve). Listening, examining, inciting action and reflection (Coghlan, 2001) compliment continuous experimentation of divergent thinking, whilst acknowledging healthy

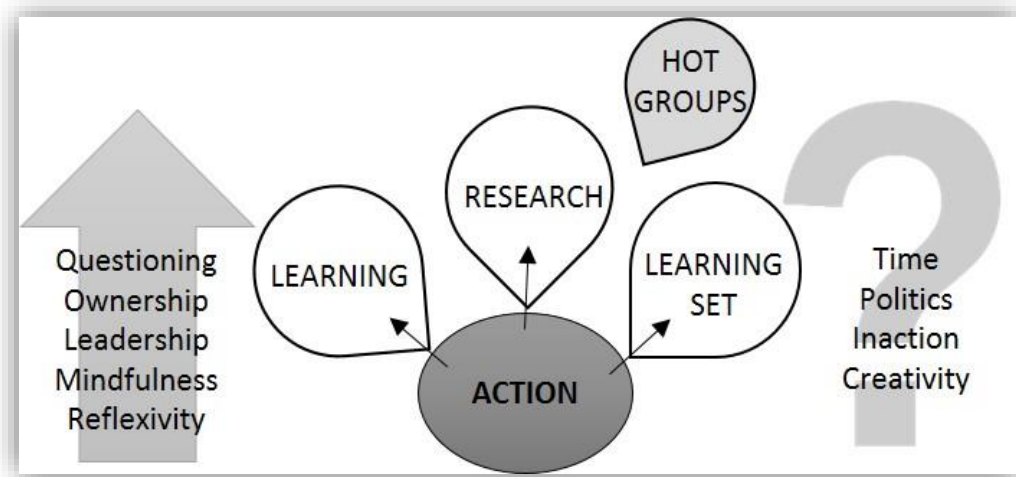


Figure 2.1. Framework Fundamentals - Notions of Action

conflicts (Cassell and Johnson, 2006). How managers confront existing situations consciously in action-based environments determines 'Q' or questioning (L=P+Q) to avoid quick fixes and instead dig deeper (Boshyk, 2016).

The exploration assumes several iterations, like the 1970s Japanese manufacturing policy that asked 'why' five times when faced with a critical operational issue, because they believed that root causes rested at least four levels below the surface (Ciampa, 2005); a strategy I could employ in the ALS. Individuals learn best when they come together voluntarily to know what we *don't* know (Boshyk, 2016, Marshall and Reason, 2007). The intersections of embracing new learning (exploration) and previously learned (exploitation) is the co-generative practice to reshape newly discovered dimensions (Crossan, Lane and White, 1999, Greenwood and Levin, 2007).

### **Ownership - *accountability***

Rigor, relevance and reflexivity build stakeholder spirit, sense of community and capacity in quality AL (Coghlan, 2011). The study could enable participants to take ownership of workplace change by resolving their own issues (Norman and Powell, 2004). Accountability and simultaneous knowledge creation are results of opportunistically planned interventions that inform subsequent action (Greenwood and Levin, 2007). Learning about the current state and oneself, facilitates transfer of wisdom to other scenarios that are anchored by workplace responsibility of real tasks (Boshyk, 2016, Gray, 2001).

### **Leadership - *nurturing***

Learning from failures and closing the loop to improve reframing can engross us in thoughtful action and move beyond elegant looking plans (Cummings, Bridgman and Brown, 2016). When grounded in real experience, organizational culture can endorse action and the biggest gain of AL becomes the recognition that we own solutions without 'prefiguring' (Pfeffer and Sutton, 2000, Zuber-Skerritt, 2002). Integrating personal discovery with problem-solving, learning creatively and co innovating, helps feed into collective leadership and intellectual capacity building (Argyris, 2002, Gentle, 2007). As propounded in the late 20s by Mary Parker Follett, the belief that a leader's foremost duty is to create more leaders, holds true in this situation. How the education sector tackles talent intelligence or knowledge management could be explored in this situation (Kinley and Ben-Hur, 2014). Strategic corporate agenda advances when AL tenets are used for broader learning, and by engaging employees in reflective practice integral to leadership and professional development (Norman and Powell, 2004).

### **Mindfulness - *authenticity***

Action based work is inclusive and empowering, as it stresses greater self-awareness and logic, compared to say an external consulting process that may operate exclusively in a sense (Eden and Huxham, 2005, Saunders, 2014). Fundamental questioning separates the genuine from mediocre and several articles point to its simplistic features that instil robust attitudes of inquiry, curiosity, willingness and humility (Greenwood and Levin, 2007, Marshall and Reason, 2007), each contributing to sense-making, self-reflective practice and first-person AR; a quality indicator

about *becoming* rather than *being* (Marshall and Reason, 2007). This study can become an exercise in mindfulness when bringing one's attention to experiences in the existing moment.

### **Critical Reflexivity - *power and politics***

Reflective practice involves reflection on action as continuous education, i.e. learning from one's experience and something we do on a casual basis. Conscious efforts are marked by pauses, and analyses (Osterman, 1990). Whereas, reflexivity is to question ourselves honestly about values, attitudes, assumptions and habitual actions, to understand our roles in relation to others and how we shape our surroundings than merely reacting to them (Weick, 2002). This form of critical thinking is not always undertaken at my workplace but necessary for conducting AR and to immerse in an environment that promotes such correlational thinking.

As an enriching learning process centred on emotional and power relations, AL can be used in the study to promote synergy between critical thinking and critical management learning (Trehan and Rigg, 2015). The authors affirm progression from conventional AL by deepening critical thinking and sharpening daily realities of those engaged in such political dimensions, because working through such processes makes it wholesome for all. Critical approaches in research uncover power and politics, prompting participants to appreciate issues with genuine honesty, problem-solving styles and deeper reflective practice (Shepherd, 2016). One often cited reason for studying organizational dynamics from a critical perspective is to better observe power, control and inequality than merely the efficiency or gains (Vince, 2008). This highlights the peculiarity of reflective thinking and an emphasis on the duality of power *and* powerlessness arising from tensions, contradictions and interactions (Rigg and Trehan, 2004).

## 2.5 CHALLENGES

This section discusses some hurdles in realising action-based models as visualized to the far right (question mark) in Fig. 2.1 and my critical reflection therein.

### **Time**

The AL path is known to be time consuming and painstaking (Coghlan, 2008). Individual or organizational time investment is expensive and can be frustrating when challenging issues need immediate attention, an impediment in organizations, including mine, where overnight solutions are sometimes required. Despite the benefits of participating in collaborative sessions, urgent work commitments can still come first pulling participants away from Set obligations for instance (Norman and Powell, 2004). I would have to remind myself and others, that like the doctoral journey, action approaches can be an endurance marathon not an impulsive sprint and that it would take longer than anticipated!

### **Politics**

That AR breeds a set of hybrids - neither pure scholars nor activists (Brydon-Miller et al, 2003) is to be kept in mind. So, if a group does not attain consensus or required cooperation does it lead us to conclude that AR automatically fails? Existing power compositions can also inhibit action-based projects (Zuber-Skerritt, 2002). McLaughlin and Ayubayeva (2015) echo the lengthiness of AR projects that need supportive workplace structures, luxuries not all organizations afford, especially during change, power divide or employee disengagement as observed in my workplace. It was important to keeping this critical hurdle in mind.

## **Inaction**

The pervasive presence of power relations can impact ALS and not produce any desired learning but a numbing inaction instead (Vince, 2008, in Pedler and Abbott, 2013) that is more aggravating, stagnating and a waste of resources with no immediate or tangible outcome. The possibility that an ALS may not produce any results or fail to stoke participants' learning appetite was existent and my study would need to be equally aware of unaltered situations and the risk therein. This was something I knew as a Set participant in the DBA program, and something that study participants would need to experience and know for themselves.

## **Creativity**

Do we curb our spontaneity and imagination, and cater to prevailing world judgements (Kelley and Kelley, 2012)? As a known leadership trait, creativity must be rekindled and nurtured, to courageously face the *unknown* or messy. ALS can offer guided mastery to chip away discomfort, make one willing to tread unfamiliar territory or embrace change (Coghlan and Brannick, 2014) but the idea of letting go, may still be distant for many. This study would have a diverse participant roster, yet without setting any expectations, creativity could be highly subjective or unpredictable.

Having outlined commonalities and challenges of action-based notions, the following section now summarizes gaps identified and how my study lies in those intersections.



## 2.6 EXISTING WORK AND GAPS – *my position*

In examining literature, it is evident that unless organizations successfully manage internal knowledge, not all potential ideas always convert to learning and innovation (Ayuso et al, 2011, Widén, Olander and Atkin, 2013). Integral to innovation diffusion are well planned engagement and co creation strategies (Bushe, 2013, Lee, Olsen and Trimi, 2012). The forerunners of such a scenario may be called a ‘team’ or an ‘incubator’ or nothing at all, yet serve as catalysts breeding informal Hot Groups and providing ideal conditions to flourish unabashedly (Ahmed, 1998, Bacharach, 2014, Zich, 1995). Empowering innovation involves individuals carrying forth transformational leadership attributes such as from the ALS experiences, and who can stem a contagious streak across the board (Gumusluoglu and Ilsev, 2009).

My own visualization and interpretation of the various notions considered in literature for this study is depicted in Fig. 2.2. It shows the starting point which can be a germ of an idea (innermost circle) and one that can permeate into the larger framework (or outer circles). The power and intrigue of Hot Groups has led me to consider how creative, bull-headed and energetic patterns can be synced with real and long-term approaches within an organization. ALS usefulness across industries is evident, but few have drawn linkages to creative innovation, knowledge management, or Hot Group like synergy. Herein, combining Argyris’ and Raelin’s relevant works of empowering action through reflexive practice come to light.



Figure 2.2 Literature Review Framework

### Relation Between Terms - *focus areas*

The layout presented reflects my ontological reality i.e. multiple workplace realities and their existence as intersections of three radiating circles (Fig.2.2). The elements in the outermost circles are the known facts or *what things are*, where one notion may organically evolve or connect to another within my organizational contexts, and hence labelled along 'Ontology'. This inward evolution points to the inner circles i.e the core or in other words, the epistemology. I understand that getting in proximity to colleagues to gather subjective evidence from fieldwork is philosophically, *the way we know things*. This movement towards the inside shows the application of theory to real time fieldwork that make the concepts tangible than merely a

collection of my personal opinions. By filtering from both, academic and organizational standpoints, I have tried to converge on the true nature of alternate avenues that exist within my organization. This process has allowed me to arrange fundamental ideas, at my workplace and how they drive or impact the other, from my perspective. Also, what begins at the core (innermost circle) can even spread through the workplace (other circles) and subsequently influence the overall environment over time.

The following section considers one circle at a time, starting with notions in the outermost circle.

## 2.7 CRITICAL LINKAGES - Outer Circles

This section outlines select notions – some of the more dominant, prevalent and surrounding ideas relevant to the study (outer circle framework (Fig.2.2) that inform the literature and move relationally towards the core (inner circles).

### **Organizational Environment - diversity and inclusion**

The richness of our identity and learning is reflective of our organizational environment, and what is often known as its cultural fabric (Pauchant and Mitroff, 1988, Putri, Mirzania and Hartanto, 2020). Genuine creativity, diverse viewpoints and collaborative decision making contribute to organizational innovation (Jain et al, 2015, Burns and Stalker, 1961). The underlying thread is inclusion, yet when transitions occur, some of these exist in silos lending little or no personality at all to the organization (Blanchard, 2008). Discrete, divided or disruptive workplace decision making have made me probe the interplay of organizational structures and environmental factors including leadership or the absence of (Vroom and Jago, 2007). If this means governance choices must be altered and not the personality, then we must consider alternative avenues (Greenwood,

1993, Mote, 2014) like conscious processes and opportunities, as in this study. Not all managerial culture learns to fail intelligently or grow from inherent discovery (Ping, n.d., Wilkinson and Mellahi, 2005). To this end, the overarching AL objective is to open up conversations to one and all and capitalize on every ongoing situation, even setbacks, as a life lesson (Cannon and Edmondson, 2005).

### **Change orchestration - facilitating transition**

Organizational transformations are natural, continuous and inevitable. Having experienced workplace shifts in my organization, I find solace in the term transition management, because albeit a demanding lens, it views change as prudent examination of what is simply in front of our eyes (Tsoukas and Chia, 2002, Wittmayer and Schöpke, 2014). My lens is still adjusting to focus on the potential within, echoing my institution's core values of being learning-oriented to support divergent thinking, creativity and innovation (Brockner and James, 2008). As well, faculty roles align with narration, which is an integral part of classroom-based content delivery, sharing of experiences and sensemaking, when they teach students. All of these attributes subconsciously hone critical thinking (Gold et al, 2002). Because AR is inquiry done by or with insiders, transformation occurs within such settings, among participants and researchers themselves (Herr and Anderson, 2014). Furthermore, orchestrating such alteration implies tapping into explicit and tacit knowledge to harness critical thinking, and the inert awareness that change is *changing* (Burk, 2019, Dawson and Andriopoulos, 2014). We know that only select aspects of a wicked issue are manageable, and that the measure of success is often seen as deft management skills. (Wallace, 2003). This allows us to understand and appreciate that change represents the continuity of the past, while innovation represents a discontinuity (Brown and Osborne, 2012).

This distinguishing feature implying disruption, reconfiguration or deviation as a necessary crossroad in such a continuum. Irrespective of the outcome, the endeavour brings in valuable lessons and a capacity to view change as a learning tool. Modifications are response manifestations and the urge to keep up. To think like a traveller, rather than be on cruise control, is imperative, so we may function on a higher frequency and embrace new insights (Kelley and Kelley, 2014).

### **Empowering collaborative, disruptive mindset – engaging intrapreneurs**

Like Google's nurturing work environment that spawns 'googlettes' or grass root projects with potential (Hamel, 2006), innovation capacity is a true measure of organizational learning to diffuse and manage those transitions. Innovation equates to negotiating relationships to seek relevance in irrelevance again (Hargadon, 2002), and the dexterity of piecing together organizational perspectives of efficiency and chemistry in a seamlessly habitual fashion (Rozman and Kovač, 2015). It becomes a way of life, a mind-shift to re-engage personally (Shamsi, 2017). Such communication weaves organizational fabric into collaborative spirit whilst proactively immersing employees into rewarding alliances and closing gaps in organizational practices (de Sola Pool, 1973, in Johnson, 1992). While 'voice from the top' of the ladder i.e. management, often sets momentum, organizational synergy is better achieved when methodically initiated by engaged stakeholders i.e. grassroots (Dee and Leišytė, 2016). AR is best done with those who have a stake in the problem under investigation through a series of necessary tensions (Herr and Anderson, 2014). And as the first serious managerial method to redirect attention to *what works*, AI enables leaders to consider (not what the situation is but) *how* it is situated and the possibilities within (Ashford and Patkar, 2001, Grint, 2005). The relation between change and

innovation is an overlapping phenomenon; their convergence and divergence indicate that innovation is a discontinuous but specific form of change (Brown and Osborne, 2012).

Nurturing disruption means access to an endorsed space to support novel thinking and innovation (Brafman and Pollack, 2013). Managing change and innovation needs creativity as pre-requisite (Jain et al, 2015), and an innovation-supportive culture as core organizational values (Chandler et al, 2000, Herbig, 1994, Khazanch et al, 2007). Disruptive innovation binds a squad of innovators, equips them with a blank slate, and lifts all boundaries- since the only focus is and must be discovery (Lepore, 2014). It is also worth noting that innovators subtly differ from intrapreneurs or 'inside entrepreneurs' in that, while both share newness and thirst to alter structures, innovators work beyond organizational paradigms and culture (Antoncic and Hisrich, 2003). This study uses AR as the transformative vehicle to disrupt status quo, hence the first step is to cultivate intrapreneurial culture for employees with vested interests, supported by authority to navigate corporate politics and a shared learning space to do so. (Grogan et al, 2007, Pinchot, 1985).

## 2.8 CRITICAL LINKAGES - Inner Circles

This section steps closer to my research focus offering a critical evaluation of the organizational context. I begin with the ongoing awareness as an insider researcher and look at the experience as a form of shared learning with intersections of Hot Group like spontaneity.

### **Insider Researcher - crucial conversations inspired by tempered radicalism**

My role conflict has constantly pushed me to balance objective and reflective sides of an intellectual on field (Coghlan, 2001). Finding comfort in ambiguity and associated tentativeness within move in tandem with the perils of being too close to data (Raelin, 2010). This can foster or hinder relational trust with participants from previously familiar associations (Pablo et al, 2007). In my case, colleagues, applied research and ethical reviews of institutional projects have provided a reality check. As well, maintaining a reflective journal throughout the research study became a cathartic tool to remind myself of the role duality. This helped check power relations between me as researcher and my colleagues as participants or any (mis)assumed comfort associated with information sharing processes or challenges (Aburn, Gott, Hoare, 2021). Groysberg and Slind (2012) opine that communication patterns may have slowly moved from corporatized rigidity to organizational conversations but this could be selective, since top-down models seem to persist in my organization, just as they do in several others (Dee and Leišytė, 2016). Transparency involves looking objectively as an outsider and collaborating with insiders remembering that action is central in such research (Herr and Anderson, 2014).

Dabbling with a tempered radicalism approach has allowed me to experiment with my individualistic tone, and explore a collaborative management approach to convene mutually beneficial conversations in a group setting (Meyerson, 2003, in Attwood, 2007). During the foundational interactive DBA lessons, my Set members would light heartedly comment on how we were potential change agents who could necessitate intellectual revolution via actions, without causing too much trouble (Meyerson, 2007). Tempered radicals effect change from within their organizations and deftly exhibit identities and values different from the majority

existing culture whilst seamlessly fitting right in (Meyerson, 2008). I seek to imbibe that balance, to speak up when necessary, deviate when required, conform or challenge by treading prudently and maintain unique credibility as needed. This is a step toward making a difference using Meyerson (2008)'s ideas of intellectual capacity building; an ideal workplace platform where employees can collectively prompt spontaneous thinking and periodically rock the boat to help pause, reflect and take action. An internally diverse and educated pool can generate numerous 'real options' such as bolster leader-follower dynamic, strengthen self-leadership and practical boundary management (Coff, 2001, Fisher, 2000). It is said, that even a *super* leader leans heavily on those around to draw basic strengths from or gain competitive advantage (Manz and Sims, 2001, in Sim et al, 2009). So, Raelin's cue to engage in dialogic inquiry and actively seek out willing participants for critical conversations is well founded (Isaacs, 1993).

The intention of building a communications repertoire (Su and Wilkins, 2013) based on Vroom (2000)'s philosophy of not *what* to decide but *how* or with *whom* it should be decided, corroborates the true spirit of Raelin's advocacy to look for leadership in its music and activity. This centres on its location and not entity to shape my inherent and acquired perspectives for a two-dimensional leaderful practise (Grint, 2005, Hewlett et al., 2013). As an employee in an academic setting I must exercise the tact of tempered grassroots leadership and confront endorsed practices while pushing boundaries in classrooms or beyond (Kezar et al, 2011). Ultimately, the two sides of AR i.e. *inside* involving AR community and the *outside* focusing on how we know are critical to appreciate the knower and the knowledge (Coghlan, 2011, McLaughlin and Ayubayeva, 2015).



### **Appreciative Inquiry – acknowledging what works**

ALS's experimental approach can work in tandem with AI as a strengths-based model, which was established as an organisational development intervention for large group change (Alan, 2010). A culture of shared learning has existed in silos in my organization (Bechtold, 1997, in Burnes, 2004, Gallagher and Day, 2001), through teams willing to self-organize, temporarily innovate and get the job done, rather than push the envelope for long term reasons. Having been part of such workplace units to drive impending curriculum projects, I have personally experienced and enjoyed the intrinsic resourcefulness and synergy that is found in such collaboration. These groups are essential to navigate change and an innovation culture which can in turn move mental modes to higher grounds (Uhl-Bien and Marion, in Malloch, 2014). That "humans steer in the direction of their deepest, most frequent inquiries" (Cooperrider and Whitney, 2011, p.7) prompts learning-oriented organizations to tap into their assets (Brockner and James, 2008). AI seeks answers when probing *how* people think than *what* they do and by looking for the best in people, organizations and the world around (Bushe and Kassam, 2005, Cooperrider and Whitney, 2005). Taking advantage of what already works via available expertise can work more naturally than mere outsourcing or at the cost of side-lining existing competencies. Cooperrider and Whitney's "4D model" engages employees and amalgamates strengths; an overlooked aspect at the onset of change in my workplace (Caldwell, 2003). Divergent standpoints offer multi-perspectives just like 'wearing the thinking hats' (De Bono, 1990), that smartly navigates teams towards possibilities (Ford and Ford, 1994). It becomes an opportunity to compare diverse frames of reference (Cummings, Bridgman and Brown, 2016, Isabella, 1990). As a realistic form of mindfulness that creates a practical, mental 'link' to change the subject and even the

organization, the 4D model remains practitioner centric, interactive and intuitive to deliberate and affiliate (Cooperrider and Whitney, 2011, Weick, 1985). While numerous studies highlight positive impacts of ALS on collaborative and critical reflective thinking for personal or professional amelioration (Anderson, 2008, Cho and Egan, 2013, Dilworth, 1998, Gentle, 2007, Joesbury, 2015), the approach often faces sustainability, longevity, time and confidentiality concerns (Walia and Marks-Maran, 2014). To this end, AI nudges us to move beyond deficit models, identify the best of *what is* and consider possibilities in a realistic fashion to keep the momentum going (Ashford and Patkar, 2001).

### **Hot Groups - a leadership constellation to shake things up**

Described as an intellectually stimulating, purposeful approach to get the job done, and connecting those who collectively carry out essential leadership functions in a dispersed fashion, Hot Groups separates power from specific people (Yukl 1999, in Gronn, 2002). They converge on relational, moral, emotional interplay, corroborating Raelin (2011)'s leaderful model and validate by moving away from 'aboutness' (monologic) to 'witness' (dialogic) (Shotter, 2011). The endless opportunities found within, instil inspiring work culture and become an exciting prospect for fresh ideas in an otherwise jilted climate such as my workplace, owing to ongoing change. High-energy, commitment and awareness to stay current in areas of expertise permits individuals to thrive and lead in the ecosystem (Pyser and Winters, 2018). Lipman-Blumen and Leavitt describe the Hot Groups phenomenon as 'positive group think' that encourages goal-focused managers with a plural state of mind and one that elevates them beyond organizational politics and resource barriers. Such persistent groups flourish in self-motivated freedom, creativity and spontaneity coupled with the debates and discussions that spring forth from change (Coghlan

and Brannick, 2014). One of the critical pre-requisites involves sponsorship of these incubators to continually nurture out-of-the-box thinking (Lipman-Blumen and Leavitt, 2009).

Shared inquiry helps move the organization from isolated individuals to a collaborative Community of Practice (CoP) (Herr and Anderson, 2014). In the backdrop of AR, insider collaboration causes spontaneous collusions on the margins of CoPs; an interesting tendency that make them comparable to Hot Groups. But curiously, Hot Groups possess a sense of clique collectivism that cultivates shared governance to the point they are inclined to help no matter the cost, unlike CoPs who remain task bound (Pearce and Wassenaar, 2014). This added layer makes Hot Groups an interesting facet to explore in this study.

### **Structured Process – taking deliberate action**

The process of planned change implies a deliberate attempt to interrupt habitual patterns. An intentional action is just that; to concentrate on what is useful for organizational advancement (in this case, ALS) than merely absorb facts shared at routine organizational meetings (Coghlan and Brannick, 2014). It is further suggested that contribution to organizational learning history using an ‘intervention’ is possible through concurrent, divergent and multiple voices. With an emphasis to improve communication to hear employees better, usage of facilitated brainstorming can embrace shared learning (Bunshaft, 2018). It is imperative, as an insider researcher, to keep the inquiry process active and alive, evolve with the storyline, and continuously check if consensus or interest to address diverse issues exists. Such tapestry of learning mechanisms may be *cognitive* (individual reflection opportunities to grasp and frame issues), *structural* (such as ALS with feedback and shared inquiry) and *procedural* (institutional

systems in place or sustained practices going beyond the insider researcher initiative) (Shani and Doherty, 2008, in Coghlan and Brannick, 2014). The motivation behind my effort is to broker this opportunity which may be a short-term arrangement, into a sustained organizational practise going forward. With open access of knowledge gaining ground and educational institutions anchored in critical reflective practice, there seems to be an increasing tendency to foster meaningful scholarly work (Larrivee, 2000, Mertler, 2017). My workplace prides itself for its core vision and values that reflect transformation of its communities through learning; an important reminder to start the journey from among employees, in that case.

In this empirical structured process entailing group collaboration, ALS data guides the AR, providing generative insight and access to an organization to enable change (Schein, 2008, in Coghlan and Brannick, 2014). Reflection is ingrained in such exercises; but can predicted outcomes occur, or continue unchanged in the same pace or manner without intervention? Unlike traditional sciences, AR demands intentional involvement using action spirals with any new awareness gained to be fed right back, aligning with true reflexivity of such undertaking. A refined form of “social engineering” as per action researcher Maria Mies (cited by Chisholm, in Herr and Anderson, 2014), this feature can allow the ALS to offer livewire perspectives.

## 2.9 POTENTIAL OUTCOMES – literature and this study

Myriad literature in management practice allude to the powers of action-based work and in scaffolding individual thought processes into broader, collaborative ones. The following section captures some gaps and how my study can support and enhance management practice, and especially within a community college perspective:

- **Interconnectivity:** There exist some inherent overlaps or ties between ALS and Hot Groups. Yet, literature has treated them in silos, overlooking their combined potential force that can be used as meaningful experiences and lessons for scholars and practitioners. Merely inspecting notions in isolation has left the terms as individual cornerstones that can otherwise be coalesced into a dynamic confluence in the arena of action-based work.
- **Disruption:** An energetic idea such as a Hot Groups cannot build overnight, nonetheless it can emerge as a latent ALS effect to herd chaos in the right direction or spike innovative conversations. The mainstay of this study is in using structured ALS processes as a catalyst to nudge seemingly ordinary situations to alternative possibilities, and with the intention to break monotony.
- **Political nexus:** Earlier critical reflection has pointed to managerial action as having political dimensions and implications, but literature has not always deliberated deeper. Any management discussion inadvertently intersects institutional agenda hence there exists a clear possibility to highlight these sentiments in a more constructive fashion with linkages to ALS set interactions and insight.
- **Virtualization of AL:** Proposing a hybrid study tool (where ALS discussions weave between in person and online), aligns with the evolving global post pandemic environment (COVID19) that has thrust everyone into inevitable virtualization. This adaptive response is a compelling opportunity to further explore VAL which remains under studied especially when participating remote or hybrid, as an added layer of security, willingness and sharing (Wilson et al, 2021, Heywood, 2020).

## SUMMARY

Circling back, this literature scan has thrown light on the abundance of action-based work, its known benefits, challenges and its acceptance as mainstream research in academia. To my study, AR is part of the study design and subject matter, making it even more interesting, in that, narratives to support such an undertaking and scrutinize demerits had to be simultaneously considered. This exercise was critical to strengthen my own position and make the endeavour feasible. As researchers we rediscover the study objective as the project develops and we are compelled to consider unanticipated directions by combing appropriate literature to connect the dots (Coghlan and Brannick, 2005, Herr and Anderson, 2005). To this end, the conceptualized literature framework (Fig. 2.2) is presented as a model of change (in Chapter 5) to underscore certain concepts as the study unfolded.

The following chapter discusses my approach to align required study design and methods, and provide structure to the research focus, i.e. observing and understanding the movement of collaboratively created knowledge into learning and innovation possibilities (Ayuso et al, 2011, Widén, Olander and Atkin, 2013).

## CHAPTER 3: STUDY DESIGN

### INTRODUCTION

This chapter discusses the philosophical framework that my research is based on and reflects the set of beliefs and understandings from which the theories and practices of this study operate. It outlines the research focus, my approach to the research problem, design and methods. Sample selection, data collection, research process, study implementation, data analysis plan and tools, and ethical considerations are also discussed.

The chapter is organized as Paradigm (foundational work and my research stance), Design (methods, recruitment, data generation, analysis, validity) and Ethics, followed by a Conclusion.

### 3.1 PARADIGM

After the approval of my proposal, I drafted a preliminary framework based on the envisioned AR outcomes. This lengthy phase allowed to streamline processes in a sequential manner to align organizational realities like scheduling conflicts (participants), administrative timeline (applications and approvals) and scope for reflective practice (embracing my own critical reflexivity). Next, the research methodology phase involved some systematic mapping to inform the research when combined with appropriate research methods and techniques (Kothari, 2004).

## Designing my research - bark of a tree

Using Easterby-Smith et al's (2012) analogy of a tree trunk, it is evident how one seldom views the hidden inner core of a study that symbolizes the strength, vitality and coherence (ontology, epistemology, methodology) but that we only see the external visible elements (methods and techniques). My design was driven and reflective of answers I sought to know. As elements of the philosophy of knowledge, both ontology and epistemology sometimes overlap but have clear distinction: the former is *what things are* while the latter is *the way we know things* (Easterby-Smith et al, 2012). As illustrated in Fig. 3.1, I had to identify my awareness of existing workplace facts and how my approach of using narratives of lived experience of ALS or AI would throw further light on the unknown.

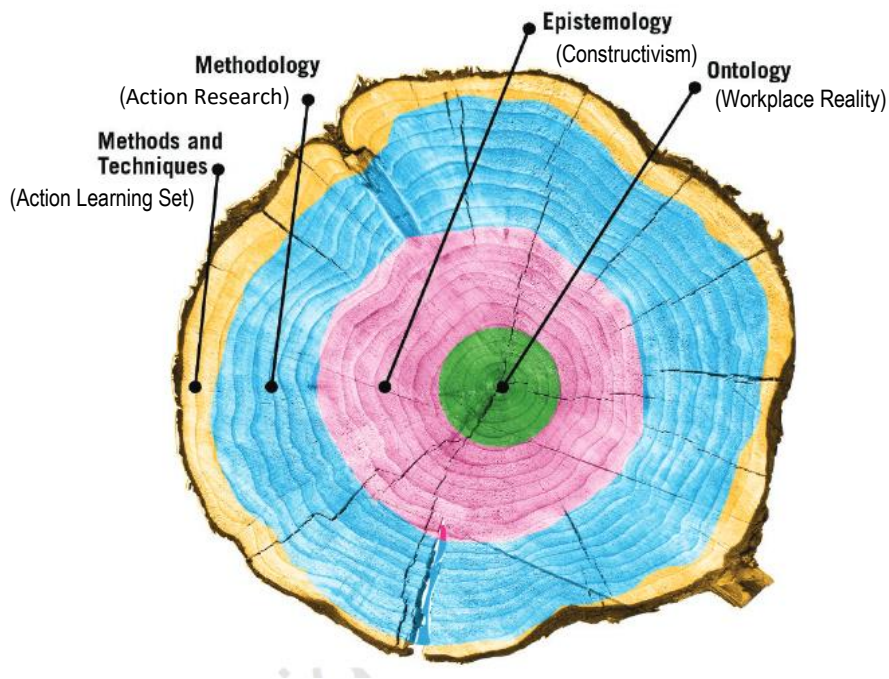


Figure 3.1. The trunk of a tree, adapted from Fig. 3.2 Easterby-Smith (2012, p.17)



## Research strategy - my approach

Clinical research rooted in medical science believes in collaborating *with* its participants than on or for them, allowing closer inspection of organizational change from outside and inside (Tsoukas and Chia, 2002). This approach helped me make informed judgement towards learning and better knowing organizational shifts (Warren, 2011). My plan was to gain deeper insight from a local situation, to adapt elsewhere based on subjective data interpretation of lived experiences of a phenomenon; in this case, a planned ALS intervention using AI techniques as a guide, specifically employing the tool '4D Cycle' (Cooperrider and Whitney, 2011).

As a researcher-practitioner, I believe in actively co creating to understand lived realities and in linking this with the ontology of *what things are*. By grounding this insight in knowledge constructed by those involved than simply being discovered, empowers everyone to become meaning makers. As per constructivism, all human knowledge becomes a social construct and the mental pictures we carry of our world relates to ontology i.e. the idea of *what exists* (Easterby-Smith et al, 2012). Constructivism is a paradigm that promotes unique alignment with learning mediated by the learner. I sought answers about organizational innovation, hence, meaningful construction from ongoing experiences when combined with action-based models could alter a situation to higher learning (Argyris et al., 1985, in Friedman et al, 2014). This oscillation on the continuum, and upward movements towards equilibrium, was necessary for realisation (Paraskevas, 2006). It also corroborates Argyryis' (1993) double loop learning process that urges one to frame, reframe and simplify the known (Cresswell, 2013). The constructivist's school of learning builds meaning from experience-based knowledge, where action remains central and the role of the learner is underscored (Merriam and Caffarella, 1999). It thrives on

interactivity, social negotiation, authenticity, and learner-centred observational study where active experiential engagement with surrounding environment spurs information generation (Dewey, 1916, in Huang, 2002). The ALS brings a sense of unpredictability, spontaneity and tapping the unknown, taking away such control. As a learning theory, constructivism suits this study more naturally, rather than say behaviourism where the focus is environment stimulated, or even objectivism where instructions dominate the learning environment (Narayan et al, 2013). Further, social constructivism is an epistemological stance I relate to, despite it being time consuming or having subjective bias. I felt that this position more readily embraces ongoing change, adaptation and evolution to be organically addressed over time. In this study, my role of building knowledge from the scenarios and subjects around me as an analysis of person-situation-interaction (than passive note taking), aligned far better with a constructivist tactic of reflecting on lived experiences and integrating them into pre-existing notions.

### **Actionable Research – Community of Practice**

That wicked problems are omnipresent, extraordinary or need decoding upon confrontation (Calton and Payne, 2003), are truths that helped scour my understanding of AR. Kurt Lewin's assertion to traditional schools of thought implied that uncontrollable variables in surroundings influenced human behaviour (Reason and Bradbury, 2008). For this, moving beyond traditional research to involving human participants via AR was integral to taking action wherein participants not only improve their own practice towards the development of organizations but the ALS would work in the best interests of the institution as well (Coghlan and Brannick, 2003, Wenger, 2011).

The study framework's actionable component involves improving our ways of addressing immediate issues using progressive reflective cycles of problem solving led by individuals while working in tandem with others (Coghlan and Pedler, 2006). This is much like a Community of Practice (CoP) - a longstanding routine revived under new coinage, that involves members in any context to stay task focused, share and learn better (Wenger, 2011). An ALS furthers this idea to improve performance through disciplined inquiry, immerses participants consciously in the subject matter to take deliberate action and energizes them to experience a meaningful journey which becomes the shared lived experience in this case (Sagor, 2000). The framework ties in sensemaking as a Set, both in person and online, making the process a shared space at all times.

The following section now discusses the type of data needed for this study, the research tool entailed, how the data would be collected i.e. the key data points, plans for analyses, interpretation and finally the validity of such data.

### 3.2 DATA COLLECTION

The research tools of a study enable the researcher to construct models and capture emerging data that is critical to quality, validity, reliability and rigor of a study (Gibbs et al, 2007). The choice of research tool depends on the research question, the population being studied, and the type of data being collected. In a qualitative study such as this, some popular and widely used methods include interviews and focus groups owing to their interpersonal element that hone in on the nature and values of subjects under examination (Easterby-Smith et al, 2012, Gill et al, 2008).

Data collection can be an inter-related series of activities to mobilize information and respond to developing research questions (Cresswell, 2013). In exploring the 'how' and the 'why', I now understand that I may have roughly known what I was looking for as a researcher; the design only emerges gradually. This is typical in qualitative AR, when the actual exercise is time consuming yet powerful and engrossing (Miles and Huberman, 1994). AR has the distinct ability to satisfy 'fit', because data gathered is reflective of participants engaged in the actual process, thus warranting relevancy (Sagor, 2000). Drawing on multiple viewpoints lends an inbuilt triangulation to strengthen, synergize and support this form of research (Cresswell, 2013). By adopting an in-person lens (ALS interaction) and an online version (dialoguing in a virtual ALS), the approach would also become wholesome and continuous over said time.

### 3.2.2 Research tool

This section covers a synopsis, rationale and features of the research tool i.e. ALS and summarizes merits and limitations followed by a concluding reflection.

#### **Overview**

A proactive organizational developmental tool and model that actively seeks to bring participants together to share their experiences, challenge each other's assumptions, and provide support and guidance, an ALS engages stakeholders in self-determined change (Alan, 2010, Shepherd, 2016). The goal of an ALS includes improving individual and organizational performance and to develop participants' problem-solving and leadership skills. So, when combined with a method of inquiry such as AI, it brushes off overuse of problem solving, kindles social improvement by innovative reorganization of thoughts and actions to create the possibility of a desirable future

and systematically taps human potential to make themselves, their organizations, and their communities more aware and adaptive (Cooperrider and Whitney, 2011). Because AI investigates *how* people think (than *what* they do) (Bushe and Kassam, 2005), it aligns with the ALS model to inspire cooperative learning, with best practices that inspire viable, transformative group-change (Cooperrider and Whitney, 2011). There is less need for incentives or coercion to effect change, thus supporting and guiding the ALS discussion as a design element (Bushe, 2013).

Analysing ALS information would follow an inductive reasoning by drawing out narratives and themes from those interactions to offer insight into areas related to the study focus (i.e. organizational learning and innovation). This reasoning takes AR into account and it is considered appropriate for smaller qualitative samples such as this study that centres around detailed, valid data to inform future practice (Denzin and Lincoln, 2005, Powell and Single, 1996).

### **ALS Features**

Being in groups is natural to humans, whether brainstorming, decision making, learning or sharing (Krueger, 2014). This method would touch on individual attitudes, values, emotions, experiences and responses, in a way that may not have been feasible had I chosen an independent survey or unidimensional interview with a potential for biased immersion, interpretation or even inadvertent workplace politics to set in (Yin, 1994). The one feature which inevitably distinguishes group dialogue from interviews or questionnaires is its rich interactivity, making it a social event replete with information (Kitzinger, 1994, Smithson, 2000). This is similar to features of participatory research that helps create new knowledge through interactions making it suitable for an AR based study (Cresswell, 2013, Ivanoff and Hultberg, 2006). Known to

thrive on the richness of spontaneous discussions, complex encounters, and an enquiry to illuminate issues often escaping other research techniques, the ALS can be a collective activity that renders secondary healing benefits to ameliorate participant morale, develop self-worth and thereby validate organizational commitment (Powell and Single, 1996).

### **Comparable Instruments and Issues**

While interviews may produce substantial independent information and expert panels reach confirmed consensus via controlled responses, they however lack interactive ability and the quality of discussion that is the signature of an ALS (Walia and Marks-Maran, 2014, Mumford, 1996). Interviews could also be time consuming, exhibit power play, seem prejudiced or leading, if carried out incorrectly by reaffirming what interviewers want to hear (Cresswell, 2013, Yin, 1994).

Some drawbacks of using an ALS may arise from moderator (in)capabilities and in respondents who trivialize, dominate or intellectualize issues (Krueger and Casey, 2014, Pedler and Abbott, 2013, Smithson, 2000). Possible groupism could also pose roadblocks when drawing a full range of valuable discussion, making them superficial for sensitive issues compared to interviews (Krueger and Casey, 2014, Smithson, 2000). Not knowing what will occur until each ALS actually unfolds is also to be kept in mind. As well, interpretive hurdles in analysis and emphasizing on the group as a 'unit' and genuine engagement are other factors I had to consider (Ivanoff and Hultberg, 2006, Krueger and Casey, 2014, Smithson, 2000).

Yet, I was conscious this setting better supported the AR methodology and a ALS framework, with the facilitator (myself) being an acute observer than an active contributor. By this, the ALS

facilitation role reflected my position as an insider researcher with a measured approach as a scribe and as colleague, so I would be mindful of not letting my own assumptions come in the way of an open interaction, instead, allowing participants their space. The momentum of inquiry process could stay active as the situation evolved, be it from a cognitive, structural or procedural lens, pushing beyond insider research in many ways (Shani and Doherty, 2008, in Coghlan and Brannick, 2014).

### 3.2.3 Sample size

An important consideration is arriving at the number of participants to be recruited for ALS discussions and while a range of four to eight members is deemed adequate, sustained participation and commitment throughout ALS phases is never guaranteed (Pedler, 20012). Hence, up to 10 participants were signed up as acceptable norm of over recruitment to stabilize data collection and eventually satisfy an ALS learning space (Powell and Single, 1996, Wadsworth, 2006). Participants were faculty or staff from approximately 85 full and part-time employees (heterogenous: varying in age, gender, ethnicity) of said department population. A purposeful sampling based on broadcast invitation sent via Department Chair (Appendix B) included those willing to participate in multiple iterations of the ALS for shared learning experiences as per the Participant Information Sheet (Appendix C ). This sampling process would increase credibility by identifying 'information-rich' data. Consent (Appendix D) would be obtained beforehand by clarifying nature of involvement, commitment, risks, benefits and implications of such practice.

### 3.2.4 Phased intervention

ALS durations vary based on organizational setting, urgency and time investment, so while traditional structures suggest 4-6 months of repetitive meetings even for self-managed Sets (Brockbank and McGill, 2003, McGill and Beaty, 2001, Pedler, 2011), business driven ones customize pressure-cooker style for 4-6 weeks (Boshyk, 2016). This study entailed 2 phases combining synchronous in-person and asynchronous online environments, over 5 months to provide structure, continuity, and enable robust data collection.

**Phase 1** would involve a maximum of 10 recruited participants to form an ALS and discuss the first two 'Ds of AI'- discover and dream of the '4D Cycle' inspired Interview Guide (Appendix E) (Cooperrider and Whitney, 2011). This would allow members to self-interview, narrate, story tell and engage in sensemaking to reveal the essence of AI as a strength-based model (Alan, 2010). Emerging themes, common threads of lived experiences would be noted for a subsequent round to occur online where conversations would continue.

**Phase 2** would be implemented within a period of 2 months, with the same participants covering the remaining 'Ds of AI' - design and deliver. This would allow reflection on their progress since Phase 1 and elaboration on next steps along the continuum of engagement, communication, synergy, leaderful practices and innovation (Cooperrider and Whitney, 2011, Weick, 1985). They would be encouraged to continue the meaningful exchange, collaboration, critique, and data emerging from the cyclical iterations of critical reflection would build on additional layers of themes and threads, along with an anonymous post-survey and in person debrief.



For numerous reasons, both phases were planned to include an online component. First, it would warrant continuity and context to cyclical AR patterns with an intention to maintain momentum from previously established synergy (Dickenson, Burgoyne and Pedler, 2010). Second, the inconvenience of a common meeting schedule at workplace made it imperative for the group to be able to connect beyond physical limitations. It has been noted that remote or Virtual AL is one of the many ways that ALS has evolved to embrace local to global level facilitation of reflection and learning (Pedler, Burgoyne and Brook, 2005), and educational institutions are not new to the online component.

### 3.3 DATA ANALYSIS PLAN

As noted previously and to revisit, the sources of data in this study would thus include:

- i. Observational *field notes* (ALS interactions in person and online) interspersed with *journal reflections* in Chapter 5 (Appendix H)
- ii. ALS interactions online via Padlet software (Appendix G)
- iii. Debrief and Post survey (Appendix I)

Data collected from the ALS would be pattern matched to strengthen internal validity and analysed using thematic approach to enable consistency and robustness (Wahyuni, 2012, Yin, 1994). Phenomenological reduction or cleaning of raw data (Yüksel and Yıldırım, 2015) offers what is most relevant by revealing the human side of occurred events in an unbiased fashion. As a methodological framework, this would involve 'peeking into reality' of individuals' lived ALS

experiences (Yüksel and Yıldırım, 2015). Such thematic analysis examines varied perspectives, highlighting similarities and differences, and generating unanticipated insights and is thus useful for summarizing key points and in allowing the researcher to take a structured and balanced approach in handling data and generating a clear and organized final report (Nowell et al, 2017).

Along with this, my *observational* notes made during field work would offer a closer look at participant interaction and add to ongoing analysis of emerging patterns made possible by deductive coding of the qualitative data. Triangulation helps to develop a comprehensive understanding, and permits validity through convergence of information from different sources (Patton, 1999). Hence other than the ALS data, *observational field* and *journal notes*, another source of information would be the post-session anonymized survey (Appendix I). While observational data would offer ongoing and interim reflective inquiry, successively building deeper understanding and guiding each round of data collection; systematic coding of post intervention survey would capture participant perceptions on ALS experience after completion of the exercise. It would also highlight the scope of the close-knit collaboration and next steps. These qualitative data points would help capture lived experience moments from *during* and *after* the ALS process, that sequentially transitioned the study from an issue to the question, to data and its analysis.

The commonality across such data points brings in a unique knowledge quotient obtained by dwelling on group exploration of a situation, empowerment through story narration, participant recognition and theory development that capitalizes on existing strengths (Coff, 2001, Creswell, 2013). I found merit in the interpretive power of lived experiences to paint a vivid picture against

a common backdrop of the ALS (Easterby-Smith et al, 2012). This process of using empirical observations to draw out thematic events (engagement and co creation), could identify shared encounters (communication, strengths, innovation) and use relevant orientation (tenure, attitude) to align with the practices of AR (Hendricks, 2013).

Using horizontalization, the analysis would reflect deciphered meanings from deidentified and anonymized response statements with no personal identifying factors, to see how individuals experience the same situation differently and giving each response the same weightage (Moustakas, 1994 in Creswell, 2013). Also, pulling out how new ideas emerged, would determine diverse contextualized manifestations of the common ALS experience. This information presented as findings would enumerate turning points, experiences and how it came about (individually, collaboratively or organizationally) to “create a cosmos out of chaos” (Barusch, 2012, p.2). Such a probe could meaningfully sequence events into life-as-lived, life-as-experienced, and life-as-told (Sandelowski, 1994, pg. 3).

### **Data Trustworthiness**

As is known, the rigor and process in qualitative research impacts its richness and value as a paradigm of inquiry (Nowell et al, 2017). In striving to meet the criteria of such trustworthiness, and make the research data sensitive and insightful, my analysis aims to identify, analyse, organize, describe and report themes found within the data set (Braun and Clarke, 2006, in Nowell et al, 2017). Thematic interpretation involves constant review and refinement of themes as new insights gained from data that inform the study focus. It offers a flexible approach to making information accessible by highlighting varied participant perspectives, while generating

unanticipated highlights along with summarizing key aspects of obtained data (King, 2004, in Nowell et al, 2017).

Following Lincoln and Guba (1989)'s guidance to demonstrate trustworthiness in this study, this section discusses the criteria and measures that were put in place:

**Credibility** - *ensuring the study offers a 'fit'*

The length of fieldwork and observation period was spread over 5 months, considered desirable for even traditional Sets with repetitive meetings that unfold methodically (Brockbank and McGill, 2003, McGill and Beaty, 2001, Pedler, 2011). The prolonged engagement combined with persistent observations through my field notes, journal reflections and post survey exercise offered ample opportunity for peer debrief and referential adequacy as a means to check preliminary findings and interpretations with raw data (Nowell et al, 2017). This would mean credibility for practitioners or readers who may want to apply or use some of the experiences that were represented by this study.

**Transferability** – *generalizability of inquiry via thick descriptions of study*

The applicability of these findings and usefulness as it pertains to a community college were always kept in mind. While as a researcher, I may not know the sites or situations where this study can be directly applied in future, what makes it relevant is the uniqueness of an institutional context within the education sector. This study specifically pertains to the organizational learning and innovation trends and needs of a community college. This way, the end user may be able to

seek or adapt the learning and judge for themselves in their own contexts (Lincoln and Guba, 1985).

**Dependability** – *ensuring the research process is logical, traceable, clearly documented*

This study process follows a clear, step by step process: from since its inception, to proposal approval and implementation, with the supervision and guidance of mentors, thesis supervisor, colleagues, numerous academic entities and scholarly works that shaped the theoretical and methodological framework, and decisions therein. The clear rationale for such decisions can be followed by a fellow researcher, such that the captured data may yield them similar if not comparable outcomes, making the decision trail auditable (Sandelowski, 1986, Koch, 1994, in Nowell et al, 2017). Reflexivity is noted as a critical component and this conscious practice helped me in recording my inner and outer thoughts regarding study logistics, methodological decisions, accounts of rationale making, and personal reflections of values, and insights on self as a 'human instrument' (Lincoln and Guba, 1985). Thus, all records, transcripts, notes including observational field notes and a reflexive journal have helped to systematize, relate and cross reference data to allow ease of capturing information and reporting.

**Confirmability** – *establishing interpretations are clearly derived from data*

In essence, the above discussion on credibility, transferability and dependability demonstrate how I reached the interpretation and conclusions and how the findings were an outcome of the data obtained (Lincoln and Guba, 1989, in Nowell et al, 2017). This thesis revisits the rationale in numerous chapters via theoretical, methodological and analytical choices and decisions made as a way to support and confirm how interpretations of data align with my findings and conclusions.

### 3.4 ACTION IMPLEMENTATION

The organizational realities of management communication and kindling synergy coexist. The common denominator connecting leadership traits (follower dynamic, power play, employee engagement) is workplace communication that is initiated, supported and sustained by management (Blanchard, 2008). Such a channel can fluently uplift collaboration or fracture it all together. In mirroring the DBA Learning Set framework, I used the approach to strengthen the design of this study. By looping in my supervisor, colleagues and institutional research networks, I also aligned required supports to ensure clear communication, a diligent project timeline (Exhibit 3.1), required resources and a critical reflective path. I revisited the literature based on feedback from my research supervisor(s), workplace observations and ongoing critical appreciation of how I envisioned this study, especially as a leaderful scholar-practitioner.

*Table 1 (3.1) Study Timeline and Action Items*

<b>TIME</b>	<b>ACTION</b>	<b>DELIVERABLE</b>
<b>December 2017</b>	<ul style="list-style-type: none"> <li>-College and University of Liverpool ethical clearance</li> <li>-Liaise with organizational authorities for logistical support: meeting space, budget (refreshments), resources (audio/video)</li> <li>-Set up online ALS platform using appropriate software</li> </ul>	<ul style="list-style-type: none"> <li>Ethical Approval from College Research Ethics Board and University of Liverpool</li> <li>Budget approval by Dean</li> <li>Secure 'Padlet' set up for live and asynchronous group discussion</li> </ul>
<b>January 2018</b>	<ul style="list-style-type: none"> <li>-Prepare recruitment materials, circulate approved broadcast emails and poster</li> <li>-Monitor RSVP, extend invitation if necessary, to broader groups to maintain sample size (8-10 participants)</li> </ul>	<ul style="list-style-type: none"> <li>Broadcast poster sent by department supervisor (Appendix B)</li> <li>15 respondents; 11 faculty + 4 staff</li> </ul>

	<ul style="list-style-type: none"> <li>-Confirm participation, space, logistics and ALS agenda</li> <li>-Send out confirmation emails with participant information guideline as preview</li> </ul>	<p>Venue and audio video set up confirmed and test drive conducted for remote access</p> <p>FAQ with ALS guidelines and provided (Appendix C , Appendix E , Appendix F)</p>
<p><b>February – March 2018</b></p>	<ul style="list-style-type: none"> <li>-Roll out Study Phase I: ALS overview and guidelines, agree on session agenda</li> <li>-Use AI technique to cover first 2 Ds: <i>discover and dream</i></li> <li>-Provide overview of online ALS</li> <li>-Gather data: consent form, interview, probing questions, transcripts</li> </ul>	<p>First in-person ALS conducted. Research overview: consent form, confidentiality and opportunity to volunteer in or out (Appendix G)</p> <p>Per participant airtime, initial dialoguing, followed by Q &amp; A</p> <p>Next steps for online conversation and timeline provided</p> <p>Journaling, compiling data, other documents for records</p>
<p><b>March – early May 2018</b></p>	<ul style="list-style-type: none"> <li>-Continue dialogue via online ALS</li> <li>-Prepare for Phase II roll out, send reminders to participants, confirm logistics</li> <li>-Engage in ALS group dialogue, identify group themes or sub themes, AI technique (<i>design and destiny</i>)</li> <li>-Conduct in-person post survey, conclusion and debrief</li> <li>-Gather data from session: interview, probing questions, audio transcripts, post survey</li> </ul>	<p>Ongoing transcripts from online conversation (Appendix G)</p> <p>Confirmation to schedule second round in-person meeting</p> <p>Continue strands of evolving topics and themes via timed presentations, group sensemaking</p> <p>Debrief material allowing reflective practice, next steps</p> <p>Journaling, coding post survey debrief data, transcription (Appendix I)</p>

## **Recruitment**

Phase I involved a departmental electronic broadcast (Appendix B) that received 15 confirmations (11 faculty and 4 staff). Early 2018 was spent in educating participants by sharing information (Appendix C), guidelines (Appendix F), and outlining expectations or preparation for the study. I had to consider chances of non-participation, stagnation, failure to reach collaborative alternatives, or participant dominance (McLaughlin and Ayubayeva, 2015). What became apparent to me was the intrinsic quality and power of this process, i.e. to learn from failures and the failure to learn (Cannon and Edmondson, 2005).

## **In-Person ALS session**

The first in-person ALS meeting hosted 9 faculty and 2 staff, where 2 joined remotely via video conferencing. Since initial recruitment, 1 faculty and 2 staff had dropped out owing to competing commitments and 1 faculty joined in the coming weeks after the initial meeting. Again, because of the nature of work (teaching) and schedule conflicts, speculation over confirmed participation was always a known risk and hence a higher sample mitigated this issue.

The room's physical arrangement (horseshoe style) lent itself to interaction, maintaining eye contact, effective and clear communication, and interaction with remote participants (projector screen). Participants could interject verbally, using body language, respond by taking turns and engage synchronously, and simultaneously with those online.

I oriented participants with study context, established ALS ground rules, set expectations and obtained consent with an opportunity to ask questions. As facilitator, I prompted introductions by way of guiding AI questions and encouraged the sharing of wicked issues.



### **AI Questions – Discover and Dream**

The probing questions from interview guide enabled participants to ‘Discover’ and acknowledge career highlights, challenges or celebrate the best of ‘what is’ using AI. They would identify strengths and weaknesses, and attempt to seek resources, to pursue next steps and maintain momentum as an ALS.

### **Online ALS – virtual way of life**

To keep up the conversation, an online discussion forum would be introduced using “padlet” (a familiar ed-tech software for participants, often used in classrooms at my institution) to guide independent and group dialoguing. It would revisit ALS expectations, actionable items, supportive inquiry over the weeks of not being in direct contact, generating similar reflection and intended impact typical of cyclical AR patterns.

The capacity of virtual modalities to bring together geographically dispersed individuals and across departments or time zones has resulted in Virtual Action Learning (VAL), a distinct variety of AL (Dickenson, Burgoyne and Pedler, 2010) and now, a common delivery mechanism in the emerging area of distance learning in academia. Firmly rooted in learner-centred behaviour, VAL is an electronic activity or ‘e-tivity’ leading participants towards organization, using messy experiments than forced impositions (Salmon, 2013). While work in the area of interactive communications technology is still evolving vis-à-vis AL support and facilitation, such scalable methods mean knowledge can be constructed with and through others in an innovative educational experience otherwise not feasible (Gray, 2001, Raelin, 2000, Salmon, 2013).

The 'padlet' was a secure (password protected) discussion platform where participants answered initial questions to define their problem statements, expand on ideal scenarios and probe others while offering constructive critique. Based on the comfortable refuge I enjoyed in a similar setting, as a DBA student, the idea was to replicate the collegial atmosphere in a real workplace scenario and for myself, to be the researcher, an observer and Set moderator. The now larger group that met in-person, was broken down as Learning Set 'A' comprising 7 participants, (5 remained active) and Learning Set 'B' with 8 participants (6 remained active) until end of the study (Appendix G). This interaction continued over the first fortnight (of March 2018).

### **Technology infusion – flexibility, inclusion, facilitation**

Digital approaches have turned around traditional models to bring the institution to a student if they cannot 'come to class', making education more amenable, relatable and new technology an extension of the old (Salmon, 2013). Having embraced technology early on in my own professional development and curriculum delivery approaches, it seemed natural to infuse the ALS similarly. Literature on technology inclusion in ALS was an added dimension to the study design. A conscious effort was made to pay close attention to two key recommendations for efficient recruitment and scripting my input as Set facilitator; so that participants were not either engulfed by dominant contributors or stagnated by overwhelming silence of those unwilling (Gray, 2001, Interaction Design Foundation, 2018).

### **Phased learning**

Over subsequent weeks, participants would proceed to AI's 'Dream' section to guide their interaction. The two Sets would become one single fusion of 10 active members in total. They were encouraged to scratch below the surface, explore root causes of issues, make a wish list

and continue to envision their ideal collaborations and partnerships. For ease of conversation recall and continuity, content from initial discussion was linked via padlet, to the second phase to keep thoughts alive.

### **Phase 2: Design and Deliver**

This segment (April 2018) had participants continue online discussions about the 'Design' of their issue(s). The group would continue articulating choices to understand what was in their control in the larger scheme of things. This development would subsequently lead the group to a final in-person and concluding ALS (May 2018).

### **Concluding ALS**

The concluding in-person ALS had 9 participants (8 in person + 1 remote), and 1 having to drop out last minute. The structure would be similar with allocated time for participants to present their progress, share findings and outline any action items they proposed. They were to specify partners, resources and how their problem had shaped into filtered, controllable chunks.

## **3.5 ACTION DEBRIEF**

A critical element of AR studies involves stepping aside to reflect, symbolizing its transformative power to link and interpret qualitative work with social situations via meaning, relations, representation and thematic facets (Greenwood and Levin, 2007, Willis, 2007), hence it warranted a debrief.

### **Participant post-survey**

The final phase agenda concluded with an in-person debrief and post survey (Appendix I) providing everyone with opportunities to reflect on the ALS format and its potential. They were

also encouraged to reflect on recurring themes or patterns observed during discussions, any surprising or challenging revelations, power dynamic, strengths or pitfalls. Participants would share if they had any 'aha' moments including any innovative, out-of-the-box learning and developments. I was keen to learn if the experience had any impact on participants. Hot Groups is known to connect leadership traits in those who can successfully network and get the job done, even if, independently, and especially when provided with an incubator (Lipman-Blumen and Leavitt, 2009, Yukl 1999, in Gronn, 2002).

This section discusses ethical issues and considerations that are integral to a research plan, before embarking on field work and collection of data.

### 3.6 ETHICAL CONSIDERATIONS

Preparing for and seeking ethical approval underscores the significance of respect for human participation and associated considerations typical in social sciences research. The responsible conduct of fieldwork gathering human data on lived experiences and the complexity of interpreting them with ethical sensitivity is paramount. As an active institutional applied researcher, I was aware this exercise would be the most fruitful yet, as it meant knowing every crucial project detail before gathering data. Ethics involving human data is especially significant in case of qualitative studies vis-à-vis study quality, social justice and reciprocity (Tri Council Policy, 2017). By seeking approval from the institutional Research Ethics Boards, feedback involved editing of verbiage for clarity, transparency and giving participants clear reasons to contribute as active co-researchers (Moustakas, 1994; in Creswell, 2013). Since the onset of the

ALS and at stages thereafter, I clarified participant consent, confidentiality, anonymity, voluntary participation and or withdrawal, risks and benefits and reciprocity. I also considered mitigation supports (campus supports or guidance) for unexpected turn of events in group setting or adverse events including embarrassment, feelings of unease, discomfort or similar.

The Research Ethics application included -

- Participant recruitment material - *study broadcast to generate response* (Appendix B)
- Participant information sheet - *study overview and objective including risks and benefits, compensation, voluntary participation and withdrawal, reciprocity, confidentiality and data storage* (Appendix C)
- Informed Consent - *participant authorisation to engage in study and opportunity to ask relevant questions* (Appendix D)
- FAQ Guide - *AL essentials, expectations, guidelines and project framework* (Appendix F)
- ALS Interview Guide - *AI model with detailed agenda, guiding questions, prompt statements, suggested discussion and debrief content* (Appendix E)
- Research Study Timeline - *sequence of events: prior, during and post field work, mapping out study design* (Exhibit 3.1 above)

From recruitment to implementation and debrief, if there was any room for possible coercion of participants, my role as a researcher was always clarified and made transparent to navigate such a situation. Opportunities were provided for clarification, asking questions and making the process transparent from start to finish. While participants knew me as a colleague, I had to continually emphasize my presence as Set facilitator and this reiterated the study purpose, the

proposed intervention and the intended outcomes. The voluntary nature of participant contribution or voluntary withdrawal from the study at any point in time, without any repercussions to participant's organizational position or privacy (having deidentified, anonymized and stripped data off of any personal identifying factors) was emphasized thoroughly as well. All of these actions reemphasized the nature of the study and at the same time, participant contribution and involvement in this collaborative process.

## SUMMARY

It is said that the best way of learning about an organization is by trying to change it (Easterby-Smith et al, 2012). Navigating workplace complexity with varied levels of authority, influence and structures involves creation of feasible frameworks that can balance scientific rigor and practical relevance (Bennis and O'Toole, 2005). Business is reshaping the world and the way we work. To this end, management research can play a pivotal role in guiding this process and engaging stakeholders in meaningful exchanges (Starkey, Hatchuel and Tempest, 2009).

Through the process of framing and reframing my research study, selecting an appropriate design and related tools to collect data and analyse them, I circle back to the bark of a tree (Easterby-Smith et al 2012). My intent is to connect the often-invisible core elements of organizational practice and to construct and bridge meanings and values, to the more visible ones made available via fieldwork. The research design and tools are the building blocks to inform the research focus, thus triggering actual processes of action taken and cycles of inquiry implemented on field, that are discussed in the following chapter.

## CHAPTER 4: DATA ANALYSIS - AR SPIRALS AND STORIES OF ACTION

### INTRODUCTION

This chapter opens with a commentary on the iterative nature of AR spirals, then discusses each circle of inquiry, with a specific focus on and impacts of the more dominant movement within those iterations i.e. the one that stood out among the elements of *planning, acting, observing or reflecting* therein. This examination of the data from my fieldwork is presented in combination with information obtained from actual ALS interactions and accounts of participant perspectives via active note taking through the study. Offering some unique insights: (i) Observational *field notes* allowed me to maintain objectivity and capture realistic occurrences with direct quotes and feedback from participants, and (ii) *journal reflections* which I also maintained provided me an outlet for reflective and reflexive practice as a scholar-practitioner. Observational *field notes* tracked factual events from a group's point of view while the exercise of *journaling* embraced my learning practice, and my embodied awareness of engaging in AR. The additional layers of data from post ALS debrief notes added value to my findings. Using systematic thematic analysis of stories that emerged from the field and their meaningful interpretation, these data points informed my research question. This is discussed along with examples of projects and ideas identified or developed as artefacts. The close alignment of ALS and Hot Group notions with the Ladder of Inference technique is later considered as a key element of this study.

## 4.1 UNRAVELLING THE EXPERIENCE

This section highlights the role of participants as co-researchers to initiate action meant for organizational change and to inspire reflective learning. It describes how their ongoing efforts contributed to existing knowledge (Reason and Bradbury, 2003). Unlike traditional research, the key test of validity for AR, as we know, is to examine if knowledge works in practice and *not*, if or how research procedures conform to parameters established by academics (Learning Agency Lab, n.d.). The multiple cycles of planning, acting, observing and reflecting are far from linear, on the contrary they emerge as a participatory, tacit, expressive and diffusive sensemaking drill, inspired by informed learning and change in a safe yet vibrant haven, as an ALS (Stephens and Margey, 2015, Weick, 2001). Such an engagement is not necessarily to seek consensus which is often found to be at odds with intelligent or radical decisions. In fact, it is more about coming together to discover and act for oneself and the organization, far removed from the mundane monotony of confined workspaces (Collins, 2001). In that, Coghlan (2009)'s 'ORJI' model of observation, reaction, judgement, intervention, helped me to inform and clarify my role by reminding myself of my position, that of participants and how they each relate to this study. I found that my position was replete with role duality and unfolded in interesting ways to extend my thinking, overcome pre-conceived notions, and sharpen my observations, all at the same time (Weick, 2002). The narrative of the action, reflection and sensemaking exercise thus became an integral process to explain the study, and to re frame and clarify the situation in order to *become* a practitioner than just being about the notion (Coghlan and Brannick, 2014, Coghlan and Pedler, 2006). Consequently, the setting for such an exercise with details on each iteration are provided below:



#### 4.1.1 Setting the Stage - ALS and AI integration, kindling Hot Groups

My own discovery made me comfortable with uncertainty inside the cycles of action and learning. The reflexivity empowered me to 'walk the talk', like Revans' praxeology which implies that *doing* is inseparable from theory and thinking (Coghlan and Pedler, 2006). The confluence of an ALS as an intervention guided by AI principles became tools to seek out *inside* stories including organizational *interaction*, *insightful* dialogue, *inventive* approaches, group and independent *introspection*, and knowledge lying on the *inside*; making it a dynamic *incubator* or nucleus of creativity (Bourner and Simpson, 2005, in Coghlan and Pedler, 2006). This laid the foundation to explore participant evolution from being a routine-bound group meeting to a more functional, productive or even sometimes, as innovative Hot Group (Lipman-Blumen and Leavitt, 2009). The intersection of these closely related concepts made the study premise clear and streamline its intentions for myself and for those in the ALS.

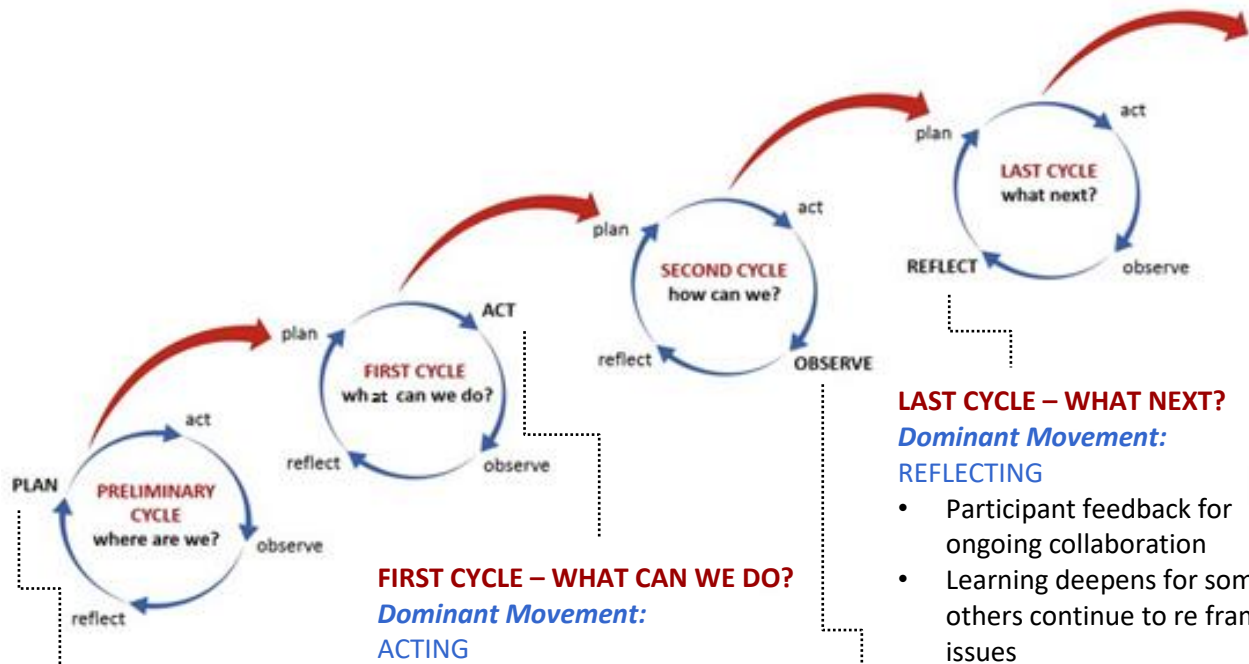
#### 4.1.2 Iterative Cycles of Inquiry

Each AR cycle has four movements working in tandem- *planning*, *acting*, *observing* and *reflecting* - that facilitate participatory dialogue and collaboration to further inquiry and enable change worthy actions (Burns, 2004, Revans, 2017, Wadsworth, 2010, Weick and Quinn, 1999). As a result, participants who are affected by the change, become better positioned to validate their experience, share and improvise on situations, and make it relevant to existing knowledge or closing gaps. Gathering shared narratives would be more holistic and I was able to observe theory and models unfold and become increasingly aware about how to develop this process as a practical exercise in a community college as it related to an educational context. I believed that

this effort to make the tacit to explicit for mutual and organizational learning and innovation would allow an enriched workplace nourished by a reflective culture (Stephens and Margey, 2015).

In thinking back, the response received from a preliminary session I had convened in partnership with the institution's Centre for Organizational Learning and Training (COLT) had been encouraging and assumed the initial step in the iteration. A group of employees from said department met in person, to engage in the first cycle of 'plan-act-evaluate-reflect' guided by the Thinking Hats model (De Bono, 1990). This exercise had affirmed my belief in engaging participants to consider the opposite of problem solving i.e. offer strategic dialoguing to build cooperative capacity. I even wondered then, if this would lead to a Hot Groups like setting, comprised of positive deviants whose intention is to make a difference by overcoming obstacles (Meyerson, 2008)? Looking ahead, I had to decipher AR traditions best suited to my beliefs, workplace commitment and organizational position since this was not just an independent academic exercise but a messy effort in reflection, conversation and collaboration over time (Herr and Anderson, 2014).

The following section describes the cyclical nature of the AL spiral approach from study inception to subsequent rounds of introspection and purposeful action (Dick, 2002). The illustration Fig. (4.1) shows the highlights of each cycle through this experience beginning with the preliminary one, leading up to consecutive iterations, thus elevating it by moving closer to better understanding or framing existing issues each time. Each cycle's narrative includes a backdrop and alludes to guiding AI questions used, along with an emphasis on the dominant element within. The below narratives walk us through this illustration, one cycle at a time.



**PRELIMINARY CYCLE – WHERE ARE WE?**

**Dominant Movement:**  
PLANNING

- Intervention framework combined with Hot Groups notion
- Open conversation with workplace groups
- Laying brickworks for formal participant involvement

**FIRST CYCLE – WHAT CAN WE DO?**

**Dominant Movement:**  
ACTING

- In person ALS
- Breaking the ice with shared themes at workplace
- Active listening and ‘Q posing’
- Identifying wicked issues

**SECOND CYCLE – HOW CAN WE?**

**Dominant Movement:**  
OBSERVING

- Group sensemaking continues online
- Breaking down of issues, taking ownership, identifying people and resources
- Building trust, offering critique and encouragement
- New partnerships and liaisons begin

**LAST CYCLE – WHAT NEXT?**

**Dominant Movement:**  
REFLECTING

- Participant feedback for ongoing collaboration
- Learning deepens for some, others continue to re frame issues
- Final in person ALS offers opportunity to share new knowledge
- Discussion on futuristic collaboration and learning avenues

Figure 4.1. Spirals of Inquiry: How we made sense of what we were learning and made it useful

## 4.2 AR PRELIMINARY CYCLE - starting point, where am I?

The foundational iteration of the observation-reflection-planning-action took early roots, during the conceptualization of this project as a DBA student, as a scholar-practitioner, as an employee, as an insider researcher and as a curious mind facing the unknown:

- *Observation* – workplace triggers that helped identify and formalize wicked issues included change in management, employee disengagement, subsequent confusion and the need to share common, lived experiences. Simultaneously, my fascination with Hot Groups provided a novel dimension to integrate into the model for organizational learning and innovation. This coupled with DBA lessons and the possibility of incorporating other closely-knit notions like ALS and AI made the prospect more realistic and less elusive.

- *Reflection* – This led to open conversation and brainstorming with my supervisor, colleagues, DBA study circles, organizational committees I was part of, and relevant literature. Visualizing a suitable and potential framework was considered. With feedback gained from a preliminary ALS at workplace, the learning was useful in better understanding communication gaps and how to simultaneously build capacity. The group had adopted the versatile ‘Thinking Hats’ technique of De Bono (1990) allowing participants to engage in beneficial rounds of give and take (Appendix A).

- *Planning* – This stage involved extensive groundwork to create an actual framework, chalk out an appropriate intervention, fine tune documents to submit my proposal to University of

Liverpool (UoL), seek feedback from colleagues, tutors and interested academics. The process of envisioning how the study would look, feel or operate on the field, in a way to prompt further deliberation and movement became critical to consider and devise.

· *Action* – Acquiring local institutional ethical clearance and from UoL involved mapping out every aspect and activity of fieldwork, rationalizing study purpose, outcome, and preparation for real time implementation. This was a particularly valuable step of the study, for it allowed me to envision what lay ahead, build in mitigation and supports for participants and become more prepared for potential questions or hurdles if any.

***Dominant movement: Planning***

Getting my project off the ground, from theory to an actual model, and being able to conceptualize details within the overall project structure became the primary milestone of this cycle. Identifying and focusing on wicked issues and having articulated it as a study design was a significant step for me. Through this process of framing, reframing, reflecting, planning and designing, I was, in effect, developing my own model for understanding personal and professional experiences, and honing those varied practices within the realm of this study (Smith, Hodson and Brown 2013).

### 4.3 AR FIRST CYCLE - awareness and discovery, what can we do?

This cycle of the project involved purposefully recruiting 8-10 individuals (departmental employees comprising faculty and staff) for an in-person ALS. After explaining ground rules and objectives, members had been advised to come prepared with their own wicked issues or nagging problems to share and discuss. The probing questions were adapted from Appreciative Inquiry's '4D Cycle' - (Fig. 4.2), Cooperrider and Whitney, 2011) and centred on 'valuing' or describing *the best of what is* in the introductory dialogue:

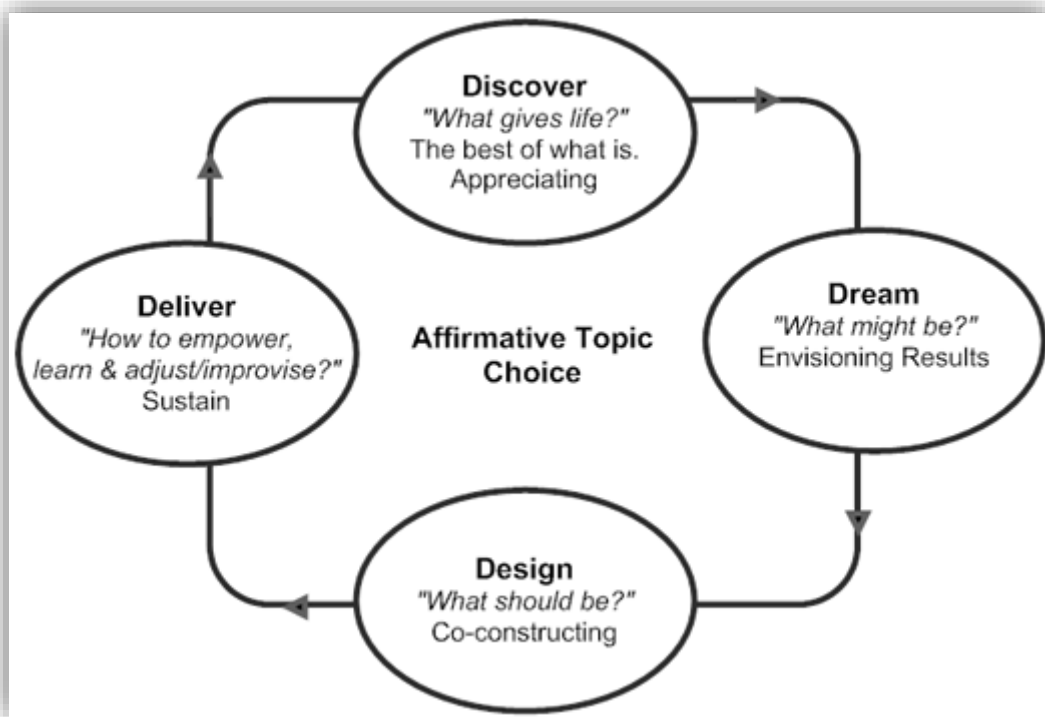


Figure 4.2. The 4 Ds of Appreciative Inquiry (Cooperrisde and Whitney, 2011)

• *Observation* – Participants were able to observe and sense some common emerging themes and concerns during the two-hour session. As educators, faculty and staff, the emphasis was

predominantly classroom management, student success, issues about delivering quality experience, better management of workload and teaching or advising strategies. The basic experience of being allowed to vocalize and share successes, career highlights and inherent individual or group strengths threw light on significant individual contributions and being recognized for it.

· *Reflection* – Thanks to AI's cooperative learning about how people think (beyond just *what* they think) (Bushe and Kassam, 2005), the direct impacts of such brainstorming were about collaboration, agreements or challenging perspectives, and likely projects or avenues to further the dialogue independently or as a group. Issues identified allowed participants to take note of respective starting point, that too, on a positive note. It automatically lent the environment to a collegial, respectful and level playing field by reflecting on two levels, individually and as a group.

· *Planning* - In this stage, recruitment of ALS participants and laying out the logistics of fieldwork shaped the sandbox for data collection. Creation of a conducive environment was an essential prerequisite so that tangible intervention could take roots. Confirming suitable and interested candidates who would be willing to volunteer their time and simultaneously provide unconditional feedback by participating in such a venture was critical to the very formation and continued contributing success of a willing and 'active' Set.

· *Action* – The highlight of this phase was being on field and nurturing in person interaction amongst participants within a formalized structure. What started with sharing long withheld

issues, became a collective space for all. In the given time, some came prepared with extensive presentation material, some used jot notes, others voiced career highlights that were emotional, authentic and centered around their passion for the job, and a few expanded on existing or shared concerns to vocalize their own situations. This step reiterated that action-based projects could clarify, alter and allow elevation of scenarios to higher and more informed learning (Argyris et al., 1985, in Friedman, Razer and Sykes, 2004). By making sense, there was visible sharing, listening and understanding of the mutual real world that participants belonged to. The Set had started taking their first combined step in the direction of collective narration and examination.

***Dominant Movement: ACTION***

Gathering data from active participation, animated conversation and authentic sharing of the 'discovery' phase, built the required momentum to ensure ALS foundation was clarified and effective for a facilitated, group sensemaking initiative (Weick, 2003, 2001). This was a critical movement to experience and see how several months of planning and aligning groundwork, endorsements and approvals fell in place and could become viable, as real time research, in action. It also enabled and empowered participants into a subsequent and necessary spiral, something they didn't necessarily know existed but had been subconsciously nudged towards, by this process.



#### 4.4 AR SECOND CYCLE - aim for the stars, how can we?

From in person ALS, the subsequent iteration was carried through to an online format over the next few weeks. Participants would summarize their reflection and begin dreaming up the most exciting and ideal situation. The guiding questions would spark imagined scenarios to speak to the second 'D' i.e. Dream, including their role in the envisioned picture with required resources to support such a vision.

- *Observe* – As an online ALS, participants posted their conversations and had begun to breakdown the larger picture, taking ownership of what they could specifically control, as against *everything*. One participant said it had started dawning in this phase that only some aspects of the sticky situation were within reach and that it became clearer what wasn't. As a result, they were better able to focus on the real deal than get caught up, stay stagnant or achieve nothing at all. Some participants started identifying people, resources and structural requirements to support their utopian wish list, while others continued reframing their puzzles.

- *Reflection* – It was evident how the group started sensemaking through online interaction (Appendix G). Some were able to connect the dots, identify commonalities in others' issues, express collaborative opportunities and reflected features of incubating Hot Groups who begin to naturally network (Yukl 1999, in Gronn, 2002). Some participants were able to look more closely at commonalities and difference in opinion, thereby making their own situation amenable to critique and scrutiny, both by themselves and others.

·*Planning* – With digital interventions being commonplace for educators at workplace, the online platform (i.e. padlet) was familiar to the group. It also made room for somewhat shy members to articulate freely online. A sense of trust previously established in person, could now be carried into the Virtual ALS, which maintained continuity of learning and broke the loneliness of leading and dialoguing (Dickenson, Burgoyne and Pedler, 2010, Radcliff, 2017). As facilitator, I reminded participants of constructive critique, mutual intervention, support, and individual accountability, all hallmarks of self-managed Sets even in asynchronous online formats (Pedler, 2011).

·*Action* – Some participants painted vivid pictures in this phase while others were able to liaise, identify and start reaching out to relevant stakeholders linked to their wish lists. At least two individuals were able to take definitive steps in creating a tangible plan to implement in the coming months: an internal ‘on boarding guide’ incorporating Set feedback, and a draft plan, to address retention strategies in partnership with the institutional student success office were underway. Internal momentum had some contagious learning effects with participants functioning as equals and experts (Pedler and Abbott, 2013), and for myself as an observer, to see the visible movement from thought to paper to further deliberation or in some cases, action.

#### **Dominant Movement – OBSERVATION**

With the in-person ALS now having moved online, social interaction took on new meaning and form. As facilitator, I nudged participants each week with questions and posts. I noted a few things: firstly, this was a case of Virtual Action Learning (VAL) as one of the many forms of the traditional face to face ALS (Pedler, Burgoyne and Brook, 2005). Second, this phase

became a case for effective use of interactive communications technology for organizational learning and innovation (Salmon, 2013). Third, the absence of management at the initial meeting reassured participants of the safe environment to continue dialoguing; it signalled a barrier-free space with fewer constraints. Next, it prompted uninhibited reflections because the virtual format became an asynchronous, accessible, flexible and ongoing conversation compared to say scheduled meetings with time or similar impediments. Finally, it still had some silent participants who seemed to prefer in person interaction than working remote.

#### 4.5 AR FINAL CYCLE – new horizons, renewed collaboration, next what?

The previous spiral involving active identification and recognition of strengths, targets and resources encouraged at least some members of the group to consider plans for the next iteration, while others were still reworking their original statements. This phase involved outlining next steps, plugging in gaps between present and future, and taking concerted effort to realize their 'dream' whilst reflecting on learning obtained thus far. The group continued their online interaction and capped it off with a final in person ALS meeting for the second half of this phase that addressed the last 2 Ds of the AI cycle i.e. *Design* and *Delivery*.

• *Observe* – With ongoing and further questioning and self-discovery, there was scope for abundant group learning. What had become apparent however, was how the digital flexibility had also doubled up as a natural repository for VAL at workplace, an accessible digital bank for group and organizational collaboration (Raelin, 2000). This virtual stock of ideas, comments and

narratives had become an open-access storehouse for participants of the ongoing interaction and ideation process. The online portal that was available to all reflected both a synergetic network between those who wished to brainstorm and a space for those needing to revisit or think through their notes, each at their own pace.

· *Reflection* – Participants' learning had started deepening in the way they now presented and shared information. Reflection on academic issues or those pertaining to student success were interspersed with flowcharts that connected student advising or classroom management policies. Some made clear connects to support their argument, others provided available research or personal experiences as reference. This was an example of academia merging practitioner skills to bring out reflective practice that is commonly engaged in, at educational institutions, such as this institution.

· *Planning* – Instinctive suggestions motivated some participants to plan draft proposals, outreach ideas, create a presence at institutional events, apply for funding or management endorsement. This setting was developing into a non-judgemental incubator for some (Lipman-Blumen and Leavitt, 2009, Attwood, 2007). For those who hadn't reached this stage yet, it was an opportunity to revisit and re craft issues, based on feedback and critique they received from their ALS peer. Overall, considering several possible options was a good take away for participants and to stay grounded whilst building futuristic steps.

· *Action* – A positive domino effect of AI was that individuals with like-minded ideas swiftly joined forces to creatively fix many pieces of the puzzle. Some had moved ahead independently, to identify resources, managerial nod or collegial feedback and fine tune or test their ideas. This way, they could revisit discussions, return to the ALS drawing board and continue working on suggestions. Yet others were attempting to scrutinize and understand what part of the whole they had in their control and were attempting to formalize their problem statement. Because the ALS proved a safe space to experiment, it became evident, there was comfort in trial and error.

#### **Dominant Movement – REFLECTION**

Over the subsequent weeks, several individuals had taken noticeable steps to continue the conversation (seeking management support), identify special projects with timeline (establishing an internal Research and Innovation Think Tank), liaise with institutional partners to map out customizable initiatives (International Office for Student Success), get ideas off the ground by collaborating with colleagues (New Faculty On boarding Guide), or identify areas that needed attention (Academic Integrity, Classroom Disruption, Faculty Wellbeing, Student Experience, etc.). This form of reflective practice seemed viable as it allowed participants a sense of freedom, personal engagement, ownership and empowerment. It showed movement from a current state of flux to capitalizing on the best available assets in the room (Coff, 2001). As will be discussed more in detail, in subsequent chapters, this culminating exercise highlighted reflection for myself and the participants, having journeyed the iterations and taking pauses to assess and reassess paths.

## 4.6 SPIRALS OF AR - breaking it down

This section highlights critical elements within the spirals that were informed by theory and prompted fruitful action from one to the next. Coghlan and Brannick (2014) remind us that AR implies research *in* action than *about* action, as well, the participative nature of the process that becomes concurrent and sequential to manage change and solve problems. In reflecting 'why' I chose this paradigm as both my study focus and design, key factors come to mind where AR assumes a basic social inquiry framework that researches action in real time (Kurt Lewin, 1948, in Coghlan, 2014, Smith, Hodson and Brown, 2013). It embeds opportunities for effective AL whilst contributing to the development of organizational knowledge building. I found via data obtained, that from a vested standpoint, it also affords other aspects as outlined below:

### **i. Opportunity as Co-researchers**

AR allows everyone to become opportunistic and inspect close at hand expertise (Coghlan, 2014). By turning timely events into objects of study, participants in this case became co-researchers and tools of the data generation process themselves, proactively contributing to the larger picture (Smith, Hodson and Brown, 2013). Participants provided themselves and the organization an opportunity to closely inspect issues and simultaneously reflect, resolve and respond by taking necessary action. These comrades in adversity were able to step into the environment together, as equals (Attwood, 2007). The direction they each chose to explore reflected their camaraderie and synergy. They became co-researchers in the process, in seeing how the process was laid out, and in respecting the fundamental idea that contribution was key.

## **ii. Questioning and Reflection**

What made the layers of ALS profound and rich were providing opportunities for participants to question on one hand (rather than providing solutions), and reflect on the other (silent recall and sensemaking of previous thoughts and assumptions) such that it prompted new learning in the process (Volz-Peacock, Carson and Marquardt, 2016).

## **iii. Framing and Sensemaking**

A degree of common pre-understanding allowed participants to initially frame an issue, i.e. name it and consider how it might be set up for analysis; and tweak their problem statement or 'reframe' as it evolved over time (Coghlan, 2014). This process also benefitted me as a researcher, to embrace one of AR's unique qualities, i.e. encouraging every participant (including myself) to co create knowledge whilst navigating existing organizational realities and complexities which started coming to full view during discussions (Greenwood and Levin, 2007).

## **iv. Experiential Education**

A subtle shift from theory (*know what*) to practical (*know how*) to critical reflective knowledge (*know why*) corroborated the idea of living and experiencing the movement in this study. This complimented the Ladder of Inference technique by Argyris et al (1985, in Brannick and Coghlan, 2007) where in, our thinking processes proceeds organically from a fact (at the bottom of the rung) to climbing a step at a time, and results in an action or decision (at the top of the rung). This progression has been adapted and expanded on later (Chapter 5).

## **v. Embracing uncertainty**

As we progressed through study phases, many participants were vocal and wary of time invested, and of the possibility that certain ideas could stagnate owing to lack of time, general disinterest or management nonchalance (Holgersson and Melin, 2015). Far worse, was possible inefficiency if any deterred projects backfired or slipped into damage control mode. Time constraints and delays are known drawbacks of AR programs, in understandably placing urgent work ahead of reflective practice (Coghlan and Coghlan, 2009, Norman and Powell, 2004). AR's long-term adaptability for three distinct audiences (myself, my team, my organizational stakeholders) was pertinent in making the exercise painstaking but credible given the uncertain nature of outcomes (Coghlan, and Brannick, 2014, Reason and Marshall, 1987, in Coghlan, 2001).

## **vi. Three Levels of Learning**

The spirals allowed me to explore how learning occurred. The process exposed if or not it enabled individual learning with competency building skills and team learning for stronger trust, cohesiveness and organizational learning. In fact, the exercise indicated a learning movement and relocation from first and second levels to a more refined structure, culture and capacity to continue the learning and conversation (Volz-Peacock, Carson and Marquardt, 2016). Alluding to Coghlan and Brannick (2015) in this context I recognized that:

*i. First order change* commenced in the preliminary spiral where the group addressed its ability to foster an inquiring approach within its immediate circle, develop deeper awareness and start to think that *'this is exciting for me'*.



*ii. Second order change* then allowed the group to question, alter core assumptions and deconstruct situations for themselves and for others so they could better engage in AR, and delve into issues of mutual concern and begin to think '*this works for us*'.

*iii. Third order change* occurred when some participants gained momentum to reach a wider community of inquiry by sharing the gained knowledge outside of the ALS and newly created information such that audiences around them began to think '*this is interesting for them*'.

The following section now discusses the dominant movement in each cycle through both phases of the study and it weaves in my notes that add rich layers of data to this analysis. Further to details in Chapter 3 on how data analysis would be carried out, ALS interactions via padlet (Appendix G) were added to notes taken in the form of *Observations* on the field, my reflective *journaling* (Appendix H), and the final post debrief (Appendix I). Each of these were de-identified to maintain participant anonymity and allocated equal weightage, valuing all perspectives of the lived experience as Set members. Data was manually coded and arranged by themes that emerged for ease of interpretation and deduction.

The first iteration of the AR cycle was in person and marked by visible sharing, listening and empathetic understanding on part of colleagues who knew each other. This lived, experienced and common reality inside and around classrooms became the foundation of a natural sense making process ie. Set members made their first collective movement towards shared narration, examination and offering unbiased feedback to one another. Anecdotes ranged from obvious

workplace facts, emotional moments to well-articulated description of roadblocks and career highlights. Furthermore, the factor that tied them together was being an active member of the educational institution where reflective practice was not new, yet, an orchestrated and intentional format this time.

### **Journal Reflections**

*I equated the ALS setting that was meant to provide a safe haven for participants as a platform for voicing and sharing otherwise ignored issues, as a space to reflect and collaborate, an arena to partner on like-minded themes, an opportunity to engage in critical dialogue or an excuse to get started on matters requiring immediate action. Additionally, given the nature of work of majority employees (within my institution) i.e. teaching, this became a welcome prospect of aligning usually conflicting schedules to a more mutually convenient one, to discuss collective issues. By its very definition an ALS was just that, soliciting responses from a deliberately selected set of individuals, about topics of mutual or independent interest in a non-threatening receptive environment. By pulling together common or varied strands from engaging discussions to reveal patterns -be it group or individual strengths and weaknesses- as a technique, it could further strengthen the collection of qualitative data for my study. Furthermore, this also began the process of thinking deeper on my role as an organizational member and reflexive practice as a researcher, i.e. thinking*

*about what I learned, how to apply that, and consider implications of the learning on those around within the broader context of the Learning Set.*

#### 4.7 DOMINANT MOVEMENTS

What typically comes out of the iterative cycles of AR is exposing participants to the painstaking back and forth before advancing to the next level, which in turn signals the beginning of a similar new spiral. We know each cycle within AR has four emphatic, repetitive features (plan, act, observe, reflect) that promote and sustain participatory dialogue for effective change (Burns, 2004, Pedler, 2017, Wadsworth, 2006). In this study, one feature was found more dominant for each cycle, and this section highlights the learning gained from each consecutive iteration over the months of fieldwork as my interpretations of Set interaction and *notes* taken. The analysis therein is reflective of coding that produced distinct themes such as *resources, emotions, social connections, knowledge building, emerging projects* (Appendix H).

#### **PLANNING – Preliminary Cycle**

##### *Journal Reflections*

*Only after mentally jumping the hoops concerning my proposal and study design, did I feel real anxiety and excitement set in; because it was time for fieldwork! This phase had marked the onset of the study and a movement from idea to implementation. It symbolized the first*

action cycle where I was able to identify the wicked issue, apply logical reasoning, break it down, and strategize with a critical lens. This would mean, using the insight to reapply differently, in a newer situation. While I was confident the AL model was pragmatic, I was sceptic about if and how others would embrace it. The buy-in for something so intangible was not necessarily going to be simple. I was concerned that unless there was continuous or genuine engagement, its impact could easily be short changed. Moreover, I had to be mindful, about challenges and advantages of being an insider. Being with and observing colleagues not only meant building on pre-existing rapport but an underlying potential for power differentials in the researcher-participant relation. There also existed a risk of assumed understanding and navigating the emotional burden therein. These memos (Journal) maintained to track the research journey and my evolution helped alleviate and engage in my own reflective and reflexive practice and became a cathartic exercise, for myself caught in a dual role, simultaneous to the therapeutic ALS for participants (Aburn, Gott, Hoare, 2021, Nadin and Cassell, 2006). As a result, I can pause and question my attitude of taking participants for granted simply because I 'know' them; I needed to revisit values and opinions from their shared information. Taking a critical stance of myself and of my peer provides balance, objectivity, adaptation and continuous learning. There is a sense of 'practising what you preach' and using wisdom gained to explore more broadly, thus implying true sharing.

*This was a group where participants knew each other well, had previously collaborated or interacted closely but were now expected to willingly share and guide each other using a structured technique in a confidential yet stimulating atmosphere. I enjoyed being fly on the wall and wished there were more such occasions and eagerly looked forward to what might arise out of the room over time. I had to also remind myself to take observational field notes in a systematic fashion, while journaling from a reflective-reflexive point of view. Keeping the two roles separate was critical; one of objective researcher and other of subjective scholar-practitioner.*

## **Field Notes**

*-Introductions: a lot of personalizing exhibited. Set members draw in from years of working and in developing a passion for teaching, learning and growth.*

*-Diversity: homogeneity in terms of belonging to the education sector and departmental workplace. Yet, there is diversity in age range, gender, ethnicity, tenure, expertise, learning styles and teaching philosophies.*

*-Value: the focus starts and remains at being student-centric with topics including issues and high points that indicate collaborative spirit and a unique entangled nature therein i.e.*

*overcoming time and resource challenges, institutional support, avenues to discuss and brainstorm as a group, etc.*

*-Broad consensus: a shared understanding of overall objective of this exercise and willingness shown by all. There is also an eagerness to participate, share and reciprocate the energy and enthusiasm upon hearing about this ALS 'experiment'.*

*-Many questions crop up including "what type of preparation would be needed?", "how do I define issues and wicked problems?", "what if there aren't any visible issues, how should I coin the statement?", "is anyone from management going to be present at this meeting?".*

### **Analysis and Interpretation**

The conceptualization of my study was heavily reflective of the effort required to firmly lay foundational elements of the spiral of inquiry, both as a tool and lived experience (Kurt-Lewin Model, in Coghlan, 2014; Easterby-Smith, Thorpe and Jackson, 2012). This entailed operationalizing relevant steps and ensuring clear communication about objectives and expectations to those involved, thus carving out a road map for myself as insider researcher, and to participants who were willing to be co-researchers. Hence it was a two-pronged approach when the question '*where are we?*' was posed to the ALS. To me, it marked the exact point as to where I was positioned and how I could observe, assimilate and continue as a dormant part of the process. To the participant, it was the first stab at knowing their landscape, how they viewed

it, as an organizational member, and as curious collaborator to foster cooperative inquiry and build **social connections** (Magee, Bramble and Stanley, 2020). This helped jointly frame ALS agenda and have open conversations about details of actual exercise and how it would unfold on the day of. The highlight of this phase for me as researcher, was being transparent, welcoming participants and to stoke their curiosity and willingness to mutually benefit in a process of personal and professional development. Recruited participants were provided the FAQ brochure (Appendix F) to come better prepared as effective contributors with an understanding of expectations, time commitment, resources and deliverables. While this clarification informed my own planning and resource building to feed into the reality of moving along in the spiral, for many participants it was about **building networks** in a new way than experienced before.

## **ACTION - First Cycle**

### *Journal Reflections*

*I reminded myself of one of my most powerful and relevant reads - Raelin (2011)'s statement that people who effect leadership do not reside outside of the concept but lie within. By reaching out to those around, I had reassured myself with renewed sense of purpose that collaborative leadership could be a by-product of AL and the Set interactions (Raelin, 2006). It was time to be innovative, yet inclusive, methodical yet practical, focused yet aware. The role duality had become even more apparent for me as I moved closer to the*

*data. Role conflicts such as this can balance objective and reflective sides of the intellectual process on field (Coghlan, 2001). This has involved pausing to observe data unfold, and later make sense of it without biasing the analysis, both of which remain challenging. This reflexivity as it applied to those around me and their learning was in tune with being better aware of any bias, preconceived notions or habitual actions I'd be prone to, as a colleague or as an employee. This added a layer to my professional development and in becoming better aware of my epistemological assumptions (Nadin and Cassell, 2006).*

## **Field Notes**

- Absence of Managerial power or influence is a huge consideration for everyone.*
- Room temperature: is charged with many varied emotions, vibes and temperaments. It is fascinating to see how all participants exhibit required passion and pride in their jobs, roles and the contribution they are making especially when reminiscing professional highlights or personal strengths.*
- Ownership: when identifying a wicked problem, some remain attached to their situation and struggle to make sense or take ownership of a piece than the whole. Yet others are relieved to have taken a load off their shoulders and have started airing concerns in full*



view, allowing questions to further dissect what specific part they could tackle. There is also a visible example of a participant being so emotionally moved when recounting their story, that for others it feels therapeutic to just listen, show support and immerse in that moment.

-In confronting issues: the group hears and shares puzzles they would have liked to see resolved but didn't necessarily know if they could even own in the first place.

-Time: Keeping time as Set facilitator is challenging; enough space must be given to enable all to partake and lead to problem identification. A balance is needed to not let personal agenda dominate and to maintain an environment of participative inquiry. It flows fairly smoothly, largely because the group becomes more self-led. The Set only needs prompts for time or to re phrase responses as a question versus offering readymade solutions. It feels like time is short for several of those who wish to reminisce and revel in reasons why they are still in this job.

-Excerpts from verbal feedback of Set members speak to palpable relief, excitement, curiosity, need for such avenues and overall mindset. Some quotes include-

"...best thing to have happened to me in the five years of being here, I achieved more in those two hours than all this time at the organization"

"This provided us with a sounding board"

"I heard 'xyz' speak about something like my own issue, can I talk to them to collaborate?"

*“I respect this form of research being done; we need something like this”*

*“Shouldn’t we be doing this anyway, on an ongoing basis?”*

*“Is this not considered part of our work lives?”*

*“I was talking to someone else and already came up with an idea, creating a workable taskforce to overcome certain aspects of my wicked problem”*

*“...we could have gone on for hours”*

### **Analysis and Interpretation**

The guiding force of this cycle was the AI 4D tenets and specifically the theme of *discovery* meant to tap into participant pulse. The session didn’t disappoint. With timed facilitation, it took minutes for the action phase to unfold surely but spontaneously. This is not to rule out other elements of the spiral (planning, observation or reflection), but to emphasize how this specific stage marked a clear flight into an authentic group sensemaking venture (Weick, 2003). There was a sense of awe and accomplishment, albeit **limited time** provided to each participant, which they identified later as an impediment. For many, it meant revisiting or confronting the unknown, and not clearly understanding ‘what next’, yet they were willing to walk a strange path having now shared their experiences. The premise (to bring in a wicked problem) made it clear that the ways of dealing with them were deeply social, and methods for working on them were expressions of shared ‘know-how’, fuelled by the need for cooperative future-making (Goodyear and Markauskaite, 2019). By partaking in what seemed a public space, the Set members created opportunities to refine concerns, passion, and thereby construct communicative power and

solidarity (McTaggart, Nixon and Kemmis, 2017). The action taken here was to **build knowledge** together, to identify the possibilities and participants were curious and willing to continue the conversation since they had set the stage with pressing questions. The time allocated seemed insufficient for some, given the free-flowing critique and camaraderie. Set members had started acknowledging and weighing in the reflection and reflective components from the genuine interaction. There was palpable eagerness and momentum, it now needed a channelized opening to sustain and linger long after conclusion of the in-person interface.

## **OBSERVATION - Second Cycle**

### *Journal Reflections*

*Digital footprints can become valid evidence of participants' engagement, their curiosity and ongoing efforts in unravelling their puzzle, by self-led sensemaking. I was also excited about being able to compare and contrast the flexibility of shuffling between in-person and online ALS to make the process seamless versus sticking to one format. It meant a more welcoming alternative for those shy to speak up, and a new way of expression, but simultaneously impeding those who prefer to be vocal when in person. The scenario was akin to my DBA Set where the moderator (instructor) would occasionally nudge us to consider and reconsider, until any learning emerged. Observations made participants more amenable to receiving and offering constructive feedback, an integral part of any Set experience. I had witnessed this, first-hand, in DBA classrooms and it was fascinating to now see the other side. Being in this*

position, it helped me understand how managerial roles can shape self and those around simultaneously, irrespective of modality (in person or online) or content.

## **Field Notes**

-Online 'Padlet' interaction often starts with sporadic posts and questions by eager Set members that show attempts to frame problem statement.

-There is considerable nudging and probing to frame, define and convert ideas into questions.

-Some report they have been maintaining their own offline notes to keep up.

-Some posts are actively supported by images, slides, links, inviting response posts and ideas.

-Reminders to inactive members spark delayed interest, they are in 'catch up' mode.

-At least 2-3 participants are very active in the virtual dialogue and push proactively.

-Term end (academic schedule) means less activity over said period and an extension is provided to continue the online conversation.

-At least 1-2 participants are ready to take bigger steps since having defined their issue, identified resources, network and supports.

-Of the more active movement, 1 participant creates a mini task force outside the ALS to solicit consultation of Set members and strengthen strategies for a proposed model.

- Of other active members, a workshop style interaction is facilitated to invite feedback for an academic and scholarly issue needing deliberation. Said workshop lacks formal structure but intention and objectives are made clear to all.*
- At least 1 participant while presenting at department wide meeting acknowledges the ALS as having been starting point for their ensuing idea and work.*
- Management takes notice and offers support for 1-2 of the projects that take shape.*
- Some departmental emails and comments indicate appreciation and support of ALS.*

### **Analysis and Interpretation**

Having moved to an online platform, this VAL routine showed how Set members were made to learn by observing. While there was substantial reflection in creating a wish list for some, the utopian picture they shared, made them accountable, build trust, network proactively, and identify strengths and commonalities. The AI theme of *dream*, along with comforts of being behind a screen, at a distance, asynchronously and with reduced time pressure, participants felt at ease in a way. The platform layout (Appendix G) 'Padlet', a popular e-learning tool in the educational milieu, had two groups and intuitively allowed collective observing, sharing and contributing (Zainnuddin et al, 2020). The 'Padlet' allowed independent comments and a discussion thread on each participant's post, adding new comments, suggestions and feedback. An advantage of this layout was that VAL fostered continuous learning and hence, dependency on in person meeting or waiting time between those iterations were bypassed. The virtualization served as an ongoing incubator (Safari, 2021) to breed, form linkages, and hone leadership or

scaffold skillsets in the room. The efforts to establish suitable networks showed through signs of trust building, identifying resources, acknowledgement of critique and genuine interest to resolve one another's wicked issues (Coghlan, Coghlan and Brennan, 2004). This stage had deliberately exposed Set members to limitless possibilities – a no-holds barred situation which left them more confident **emotionally** to bounce off ideas with one another and consider 'wish list' items. Another reason that supported this phase was the absence of management and hence a more open, relaxed atmosphere. Set familiarity had allowed the close-knit group to jumpstart (without formal introductions) by way of sharing with a forgiving audience. Finally, it was critical to engage those contributing remotely, at a time most convenient to them thus rendering the experience as the same fluid interaction as in person (Zwaanswijk and Dulmen, 2014). VAL had provided a feasible combination to support workplace learning and thus become a storehouse of new, accessible knowledge (Raelin, 2000).

## REFLECTION - Last Cycle

### *Journal Reflections*

*There seemed to be a shift in the way the communications have transpired online and then over time. What is noticed is there seems to be a lot more listening overall and the quality of probes and questioning has found new meaning. As in my own experience the importance of 'Q posing' is understated. Asking an intelligent question can be more meaningful to both, the person at such crossroads, and the one offering such additional insight. I wondered if the three levels of learning are unconsciously being embedded via this activity where Set members*

learn more about themselves, in relation to those around and ultimately in relation to a much broader context of the organization where this is situated. I frequently have to pivot my work and reflections along these 'orders of change' layers and it becomes that much more valuable when doing so with others, than alone. Speaking of which, the online format may not have entirely been comfortable for some participants. I questioned my ease, bias or approach to remote learning and collaboration, and how that is viewed when thrust upon someone who may not take to this naturally or willingly. It was obvious some preferred the in-person alternative. A hybrid opportunity (mix of in person and online) seemed an interesting exploration and I reflect on hindsight, if my own DBA set had a similar feature, perhaps, the conversations, may have also been different.

### **Field Notes**

-Participants' communication volume may have reduced; however, the quality and nature of questioning has evolved.

-Since the first cycle, many layers and threads from original ideas are now visible to those present, they're learning to connect the dots and if not, use one another's reflection to intuitively build upon.

*-Participants are observing more about themselves, their peer and the organization and questioning firmly and openly.*

*-There is much appreciation for how this system works, why we need this mechanism, and the damage when there is lack of such structure in the first place.*

*-There is a palpable need for having more 'intelligent conversations' versus 'jumping between mindless meetings', as noted explicitly by 2 participants. The gap and need for a trouble shooting system such as the Set is acknowledged.*

*-Some found the online conversation a barrier and may have preferred speaking (versus typing). They are vocal about time crunch to engage in this immersive inquiry-based learning.*

*-The stimulation has provided learning opportunity from existing expertise or wisdom compared to working alone in silos.*

*-Many are relieved they weren't subject to managerial presence and felt a sense of freedom in knowing they could participate without being watched or heard.*

### **Analysis and Interpretation**

The final Set meeting was a concluding in person session, months after the first encounter. This marked the final data point for the study, and reconvened all active participants. Many returned far more comfortable with the set up than when we first met, and with two online subsets of the larger ALS, this meeting allowed a reunion. There was a sense of excitement to learn what else had occurred over time and share in each other's discovery and developments. Participants had



unwittingly contributed to an inventory on organizational capacity building showing leaderful practice (Raelin, 2011) and had learned by questioning versus reacting to warning signs (Monroe, 2014). The predominant mood of this encounter was reminiscence, with a better idea of what they controlled in their issues or could act on. Furthermore, the positive domino had made way for natural connections and bridging of gaps to spiral into the next level of the problem-solving process (Cooperrider and Whitney, 2011). Some shared their successes through **blueprints and projects** while others listened to consider alternatives for their own situation.

This aspect of reflection corroborated several previously known facts from literature and this study extended such thinking i.e. linking participants as mere 'routine bound employees in a Learning Set', to forging constructive connections (Lipman-Blumen and Leavitt, 2009). Participants intuitively explored beyond the Set precincts and circled back to classrooms or fieldwork with information from chosen interests within teaching, learning and student-centric supports. The reflective journey had stimulated them to push away from comfort zones and seek new knowledge or insight. It was a shift from the unknown to known for mutual and organizational learning via reflective culture and didn't consider the ALS as a hindrance (Stephens and Margey, 2015). On the contrary, it created a sense of purpose. And while some had moved along the path, not everyone had necessarily arrived at this stage; they were still building on possibilities surrounding problem statement and learning to break it down.

## 4.8 ARTEFACTS IN ACTION

This section highlights some of the projects and ideas that emerged from the ALS. Artefacts and examples range from scholarly work undertaken to long term models that were adopted for daily practice to improve quality and or fill a practical or immediate need in the department.

While some of these initiatives were instantaneous or innovative, many projects took shape and effect over months to come. These were ideas that took root during ALS interaction and were developed as a result of actions stemming from Set exchanges. These came in varied forms including scholarly work, functional documents, and cross-departmental partnerships, etc., but each chalked out methodically using the ALS process and via identification of gaps assessed and a common desire to address the issue.

### **1. New Faculty Onboarding Guide**

Organically, just as an ALS evolve and support its participants, one member was able to pinpoint the exact nature of the problem and aspects under their control (Szabla et al, 2017). The said Set member took ownership and translated the issue into a practical model not previously available at workplace. This underwent numerous drafts and was adapted into the departmental “On boarding Guide” launched for the new academic semester to support newly hired faculty in and out of classrooms. Set conversations empowered this member to factor in co-participant experience and create a ‘Task Force’. This subset of the original group had volunteered to provide active input and practical insight to carve out a comprehensive ‘document’ that went through

required modification and approval before being finalized and posted on the shared accessible server for all employees to use and share.

## **2. Student Success and Retention**

Borne out of an academic setting, the focal theme of student success and strengthening retention strategies stood out for many. One participant pursued this conversation outside the department to liaise with institutional student office in hopes of creating a better student support structure. The reframing of the issue helped identify stakeholders and implementers to streamline retention and institutional student success strategies. Subsequent dialogue and further Set iterations led to the formalization of a model for student centric activities, thus giving shape and form to the seed of the idea planted in the early days of the ALS.

## **3. Applied Research and Scholarly Work**

Since the onset of Set interaction, the most prevalent or common strands of discussions were about student issues, and only naturally, since participants were in an educational setting. Areas brought up as needing urgent attention included Academic Integrity, classroom disruption, faculty wellbeing and student experience, to list a few. Some participants continued the conversation outside the Set to give their projects a scholarly approach:

- i. **Scholarship of Teaching and Learning fund:** Over subsequent months two participants formulated and successfully pitched an idea to seek institutional Scholarship of Teaching and Learning funding. This study explored Academic Integrity in the Ontarian educational milieu as it compared to the College. Formal focus groups

were arranged with students and faculty, and combined with an online survey of recent graduates to inform their research question and make suitable recommendations to stakeholders at the institutional level.

- ii. **Classroom Disruption and Faculty Wellbeing:** Another team of two participants engaged in a more localized effort for the School, specifically to gather opinion and data on classroom disruption and its correlation to faculty wellbeing. Their report was reflective of ongoing struggles, encounters, challenges and the emotional labour of teaching – a topic that was prevalent since the first ALS meeting. Findings from a survey of School employees were shared with departmental colleagues and institutional leaders. The team was also asked to present at the annual Teaching and Learning Symposium at the College, thus making it a broader dialogue than what had started out at the ALS several months before.

#### **4. Research and Innovation Think Tank**

Traditional Canadian College system is predominantly known for a ‘hands on’ approach or applied learning, versus conventional academic research. The said department, by nature, offers vocational and experiential learning opportunities, and is far less inclined to traditional research. To this end, an internal ‘Research and Innovation Think Tank’ was initiated for the School. It was a simple effort to keep track of ongoing projects and tasks, and chart future course of innovative assignments. The ‘Think Tank’ was designed to touch every program, maintain inventory, and earmark those meant for formal funding, project management or institutional support. The active

consult and tracking allowed transparent flow of information, served as a reminder for tapping into potential ideas and further those that were ready to be launched.

In retrospect, a varied list of outcomes emerged from when a group of keen and willing employees assembled via a purposeful social experiment. It had created an impressive level of disruption, intelligent interaction, visible actions, dormant but desirable designs, and above all, a sense of camaraderie and collaborative spirit for Set participants.

#### 4.9 DE BRIEF - POST SURVEY PHASE

##### *Journal Reflections*

*Being able to come together and bond over similarities and differences while seeking solace as a group, in an organized fashion (ALS) became mutually beneficial. Furthermore, group reflection and formal 'unwinding' was equally integral to such a process. From a managerial and organizational context, to orchestrate and systematically capture closing thoughts, comments and critique would support application of ALS in other settings. It felt exciting and gratifying to walk the talk and identify tools and techniques that would align with this intent. Post surveys check participant pulse after a said event and can indicate a measure of success and challenges encountered. The debrief exercise could be undertaken independently but would mean differently than when done collaboratively. The two-pronged approach to have an anonymous survey and open sharing as a group provided avenues for honest critique*

as well as lend an objective lens to the study experience(s) for participants. I would, as well, learn about the high or low points of the process as a researcher, and my relational understanding of the study, in a more purposeful way.

## **Field Notes**

-Participants applaud, critique and share a sense of connectedness and empathy. Some quotes include:

“I am confident this can be a practical, intellectually stimulating, hands on exercise to advance board room discussion to on site action more fluidly.”

“I have gone places with the grain of an idea nurtured in the group’s first session.”

“I am willing to be a sound board, and partner in like-minded ventures.”

“I found someone else’s query had similar objectives as mine.”

-At least 1-2 success stories shared inspire others to do alike or recognize lack of resources (time, pressure, etc.) to continue persevering.

-There is a renewed freedom of dialogue amongst Set members and the variety of skill sets, interests and passion in the room also become evident.

-Some participants reiterate they are present because this is refreshing and mentally stimulating.

*-One member captures the reflection as having had to step back, pause, and consider if the issue is controllable and if not, focus on what can be.*

*-Those present virtually express their sentiments of not being able to 'feel the pulse' of the room and wish they could, somehow.*

As part of the in-person wrap up ALS session, participants were asked to provide written comments and honest reflections on what the past few months meant to them and what it would mean going forward. This section is extracted from the coded thematic analysis of this data (Appendix I):

### **Resources**

Participant comments pointed to lack of time, workload and work-related pressures, access to resources and supports necessary for such an undertaking, and the appropriate 'buy in' from management for nags or hurdles faced.

### **Emotions**

There were a range of expressions from understanding ALS expectations to knowing what 'being in control' meant, a wicked issue (or lack of), the enjoyment and frustration when at workplace and identifying or framing the problem statement, the sheer freedom of expression and clarifying together, to being aware that bearing the brunt of others actions are also part of such a process.

### **Social Connections**

A unanimous feeling for Set participants was being connected, the comfort, empathy, sense of community in a shared and enjoying a therapeutic space with commonality of goals. What

resounded most was being there for each other and the ability to share, and in knowing they were in it together. Some even felt the sharing as the only saving grace and how connectedness made them resilient, respect each other and the diverse views within.

### **Knowledge Building**

The idea of breaking down wicked issues and addressing it piece by piece resonated with many. Participants commented on how intellectually stimulating this was along their educational journey, and their curiosity was teased via shared learning. They felt there was hope for resolving by digging deeper, together and in recognizing overlaps, connectedness and the transformative power when everything stemmed from the same common core (workplace).

### **Emerging Projects**

Student centricity was prime, with ongoing discussions on Academic Integrity, Student and Faculty wellbeing and mental health, accommodation and supports, This urged participants to build and take action on related next steps.

The following section discusses how an adapted version of the acclaimed Ladder of Inference embraces the closely tied notions of ALS and Hot Groups in this study.

## **4.10 A CONFLUENCE of ALS and HOT GROUPS**

In adapting the Ladder of Inference model (Argyris et al 1985, in Brannick and Coghlan, 2007) and combining ALS with the idea of Hot Groups, the illustration Fig.4.3 was conceived to explain how several concurrent ladders can emerge and exist within an ALS. I found that there is the possibility



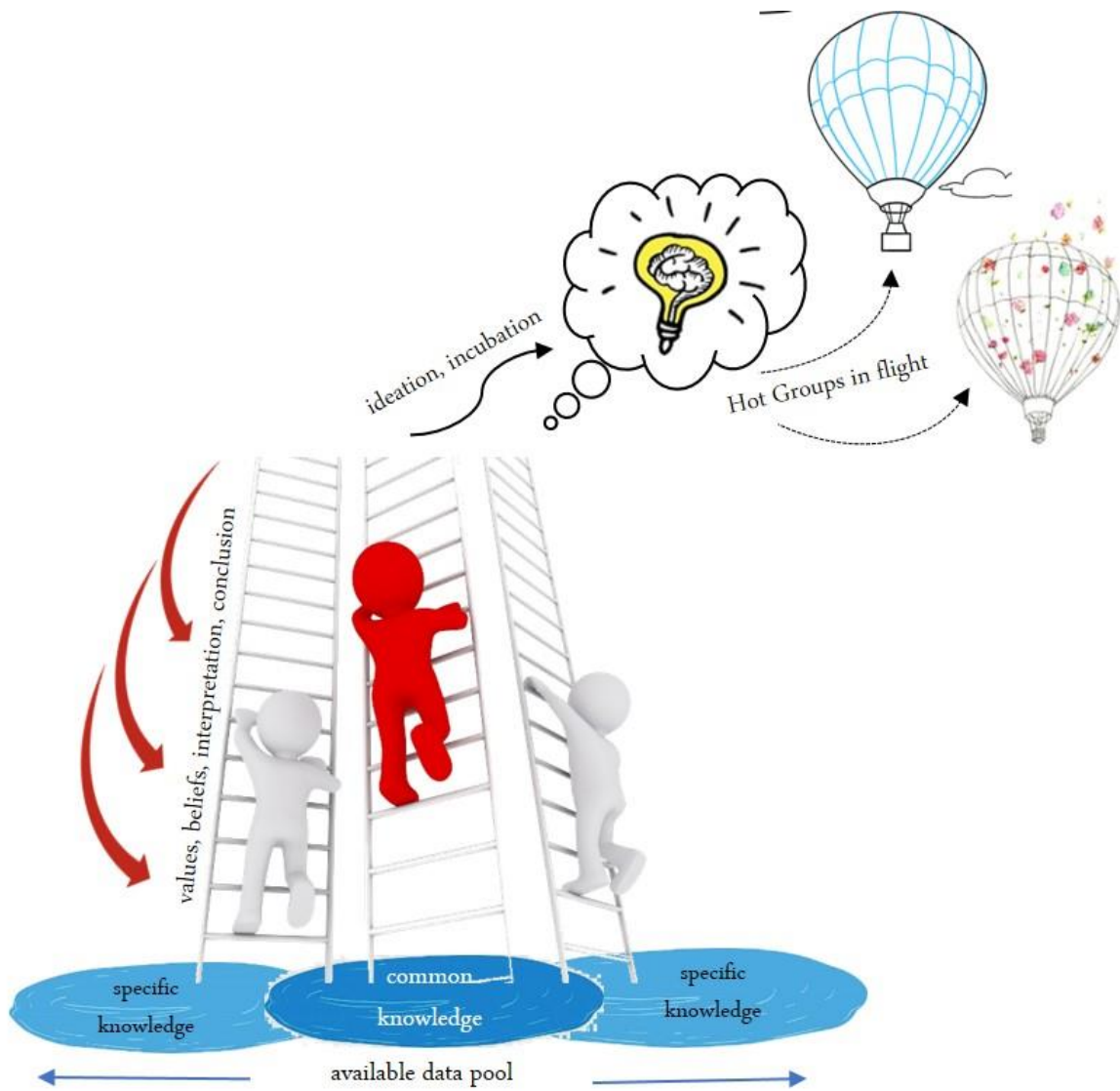


Figure 4.3. Natural Confluence: Ladder of Inference, ALS and Hot Groups

of a dynamic convergence of values, beliefs, interpretations and conclusive narration among participants via reflective thought-action loop processes while they are on their own individual ladders. The illustration also shows how the same environment or data pool is available to all, yet individuals may respond differently based on their own or group journey to understand and resolve wicked issues. Some may be able to use their learning toward self-benefit and reframing,

and at the same time profitably partner with others should they choose. Synergy and momentum obtained within this incubator could lead to ideation that may later assume a more solid shape or form (Ezzat et al, 2017). AR spirals either signal the end of that spiral or beginning of a new one. This is symbolized by the existence of more than one ladder in the illustration, since there are several individuals in an ALS and each of those journeys may be unique but coincide or intersect at some point owing to difference or similarity in thought, action, reflection patterns. Likewise, ideas denoted at the end of the ladder could either continue fine tuning and choose to stay in the ALS incubator or muster momentum, take flight, and become independent of the ALS.

This adaptation of the acclaimed Ladder of Inference furthered my own learning of ALS when combined with Hot Groups. The learning and several emerging and converging ladders that appeared, in a way, represented the making way for spontaneous, creative and inventive ideas that sought to push the envelope than stay complacent. Mandatory disruptive creativity or manageable creativity is being touted as an essential business skill that can shape innovative individuals and survival of organizations and is principally linked to the creative generation capacity of its people (Bilton, 2010, Ezzat et al, 2017).

ALS has been successfully employed as a complex social problem-solving tool (Carson, Volz-Peacock and Marquardt, 2016), one in which we work with others who seek to triumph in the same way to really make a difference (Pedler, 2017). With new technologies compelling us to work and thrive closer, VAL has played a significant role in workspaces. AL was always intended more a resolution approach to management complexities and less an educational tool (Raelin,

1991, in Curtin, 2016), so if virtual modalities can help sustain this notion, there can be a clear connect between actionable research, learning in action and even using synchronous or asynchronous technology to keep the loop going (Pedler, Hauser and Caulat, 2014). A closer look at the emerging environment with tangible and far reaching outcomes of this scenario are considered in the following chapter. What this means for the world of leaders in an ALS and how all practitioners can contribute to shared learning and embrace collaboration more purposefully is also discussed.

## SUMMARY

In looking back at some of the observable impacts this study manifested, from scholarly work, applied research projects to faculty and student models for departmental adaptation, the experience outlined how an educational setting could intentionally lend itself to critical reflection and routine reflexive practice (Clark et al, 2020). Interactive learning and innovation experiences using the ALS had created an environment of positive error consequence for participants and reinforced independent learning built by healthy dialoguing, making way for transformative moments for some (Brockbank, McGill and Beech, 2002, Gielnick et al, 2015, Marquardt et al, 2018). Would such projects or ideas have emerged in the absence of an ALS is worth asking but it was also seen how problem solving for a few positive deviants could be a result of willing, infectious and adaptive attitude that can instigate a positive domino despite any odds including prevailing power or political backdrop (Meyerson, 2008). Coupled with the messy dialoguing in ALS using AR principles of reflection, conversation and real time collaboration via in person and virtual routines, intuitively empowered those ready to take it to the next level (Herr and Anderson, 2014).

What has resonated after having embarked on the DBA path and testing this model at my organization, is that some projects or ideas just need the right ingredients at the right time; these also include a captive audience with synergy, and an action-regulatory mechanism to ignite the mindset that supports and nurtures individual and organizational pursuits (Gielnik et al, 2015). Critical reflection on this front including descriptive, inferential and evaluative observations of such an ideation process along with presenting a model of change, follow in the next chapter.

## CHAPTER 5: CRITICAL REFLECTION

### INTRODUCTION

Kurt Lewin's statement that "there is nothing as practical as a good theory" (Greenwood and Levin, 1998, p. 19) echoes the organizational reality of knowledge production. Reflective practice is a conscious exercise for instructors in post-secondary education to further their understanding of current teaching and learning, productively inform their practice and broaden their professional goals. This process is extended to my doctoral journey where the merging of both worlds (scholarly with practice) reflect in meaningful engagement of learning and development activities (Edwards and Thomas, 2010). In urging us to aim sky high, an excerpt from innovator and educator Red Burns' notes to her students (in Saunders, 2014, pg. 11) is reproduced to echo my sentiments and critical reflections - *"..that you combine the edgy mixture of self-confidence and doubt, that you look for the question, not the solution, that you are designing for people, not machines, that you develop a practice founded in critical reflection, that you build a bridge between theory and practice, that you learn to embrace the unexpected, that you turn your thinking upside down."*

This chapter presents a 'model of the change' at my organization by sharing practical contributions of the study via critical reflections in light of theory and in light of practice. As I look back at the rich experience, the significant take away are discussed and linked to keywords from my research statement, along with key participant quotes from the field.

## 5.1 MODEL OF CHANGE

Through my DBA learning and especially during fieldwork, a holistic shift from awareness to action has been experienced (Saunders, 2014). Keeping in mind the over-arching research statement and research question (RQ), the conceptualization and operationalization of constructs are now reimagined and illustrated in tracing the shift that I experienced i.e. from awareness to action. This is mapped and presented as a Model of the Change process in the organization (Fig. 5.1). In this illustration, concepts lying predominantly in the outermost circle capture the theoretical base and the real workplace conditions prevalent within my organization as in the study and are explained as follows:

1. The positions of **'Empowerment and Engagement'** evolved and overlapped as each AR cycle unfolded
2. Change management in fieldwork progressed into a more relatable notion i.e. **'Change Oriented Action'**
3. The interplay of notions such as organizational behavior, organizational culture, organizational communication and wicked issues are combined under the umbrella of **'People, Power, Politics'**

The middle circle has three concepts that are laid out in the same realm when considering the actionable part of this study:

1. The reality of **'Virtual Action Learning Sets'** is a combination of shared learning, digital revolution transforming in person ALS into dynamic and accessible formats

2. Shared learning, sustainability, creativity and curiosity are combined to represent **'Creative Communication and Synergy'** owing to ALS commonality in energy and spirit
3. The possibility of having leaders, leaderful behavior, insider researchers, in the same space led me to consider the notion of **'Combustible Agents and Connected Leaders'**

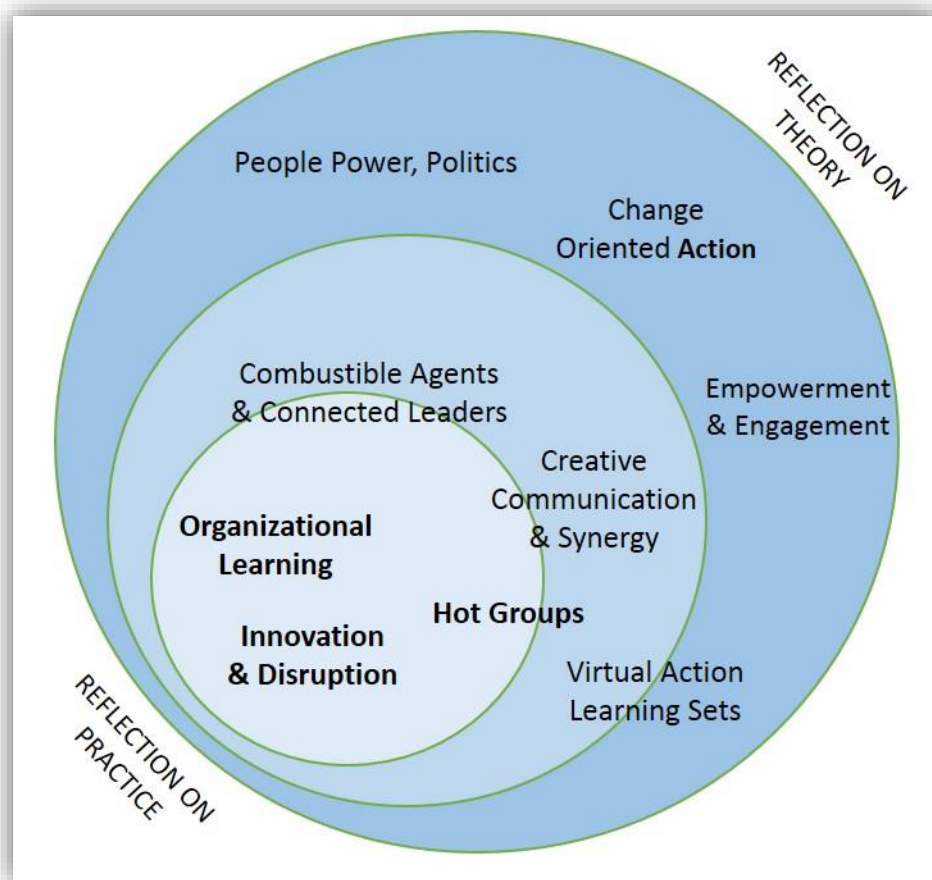


Figure 5.1. Model of Change at my organization

Finally, the innermost circle lies closest to the core and is the starting point for the study. If considered inside out, these concepts within the core would only occur when the factual elements (outer circles) are identified and acknowledged in the organization. These are the more

tangible elements seen via action, when considering practice and are discussed separately and in detail, later in this chapter:

4. '**Organizational Learning**' is the crux of an all-encompassing *people involved* and *people invested* framework. It combines numerous elements (diversity, co evolution, participation, leaderful tenets) from middle and outer circles to inform itself and neighbouring core elements
5. The idea of *diffusion* is now a more fluid but energetic concept such as disruption and hence '**Innovation and Disruption**' offer two sides of the same coin, allowing interesting and endless possibilities
6. Finally, and in combining the most active yet unpredictable nature of this study i.e. creativity, curiosity and the idea of incubating them, '**Hot Groups**' emerges as a crucial and intriguing variable of the inner circle

While each of these notions is embedded in theory, their physical location along the most recently conceived illustration determine their real-world value at my organization. We start examining each circle more closely in this section, starting with the outermost.



## 5.2 CRITICAL REFLECTION IN LIGHT OF THEORY

### Engaged and Empowered Employees

*Key Terms from RQ: engagement, synergy, individuals and organization*

*Key Quote: "I have gone places with the grain of an idea nurtured in the group's first session."*

To reiterate, employee engagement or moving away from 'disengagement' (Kahn 1990) was one of the stimuli for the study. To bind the organizational workforce as one, and amidst ongoing change, several ways to identify a common purpose and sense of cohesiveness were sought, and hence, an intervention was considered. In my own observations and professional experience as educator and researcher, collaborative efficiency along with an acumen to willingly embrace opportunities is required to habitually implement AL and reflexive practice (McNiff, 2013, Revans, 2017). As learners, we adapt naturally and are tempted to explore, especially when in a group. Therefore, with an emphasis on individual competencies and what each brings to the group rather than vested authority (Gronn, 2002), it became viable to empower and nurture local (workplace) abilities, ignite innovation and jointly move toward informed organizational learning and equilibrium in the study setting (Kash and Rycroft, 2002, Lyles, 2014).

This coevolution with a larger diverse unit made innovation a lucrative and engaging teamwork concept, and resonated deeper for me and those around (Malloch, 2014, Wang and von Tunzelmann, 2000). While group diversity contributes to building a performance culture, clarity and discipline to get the job done also reinforce core beliefs including shared accountability (Goold, 2005). This sense of authority could better broker the nexus to innovation (Sarros et al, 2008), empower stakeholders (Sim, Faraj and Yun, 2009) and build capacity via stimulation of

team play (Kirkman and Rosen, 2000). There prevailed a sense of purpose and tangible organizational synergy with ALS participants' positive contribution to morale, commitment, engagement and sense of belonging (Findler, 2007). Most striking was the revelation of being democratic, that anyone could do it, thanks to the model being accessible and hands on, fostering equitable inquiry and implementation (McNiff, 2017).

### **Change Oriented Action**

*Key Terms from RQ: learning patterns, structured intervention*

*Key Quote: "I am willing to be a sound board, and partner in like-minded ventures.", "Is this not considered part of our work lives?"*

Literature speaks to ALS altering the way participants embrace their vulnerability (when treading unknown turf) or accept ensuing change (Coghlan and Brannick, 2014). In doing so, AI has had the ability to steer participant answers towards changing *how* they thought rather than dwelling on *what* they thought. This reinforced ALS team learning with creativity (Bushe and Kassam, 2005). An advantage was in leveraging what already worked in the system, capitalizing and celebrating current expertise than seeking external 'facelift' or token change (Coghlan and Brannick, 2014). This intended first-order (specific team) to second (overall school) and third order (organizational), was a visible shift from within and made available through observable data for me, as a researcher. Using a strengths-based approach (AI) helped the team identify, co-construct or even improve existing road maps.

In using the term transition management, I found more room to accommodate the flux participants found themselves in, given a new setting (ALS) (Wittmayer and Schöpke, 2014).

Participants were learning to either unlearn or relearn and simultaneously become willing to question status quo. AR is a transformative strategy that disrupts how things stand and inevitably paves the way for ensuing modification (Grogan et al, 2007). In this case, AR was also a methodological tool, while being an effective enabler for many by transforming their experiences into lived reality (McNiff, 2017). To this end, the interplay between AI and AR provided the right medium for those engaged to combine the best of both and take what worked for them or alter current states to desirable ones, i.e. change facilitated by action.

It can be argued that impact brought about by traditional research is far different, while that by AR occurs one person at a time, via behaviour, professional practice or experiences of a specific group of individuals (Thompson, 2015). Who is to decide how useful research may or not be, ultimately must be guided by real impact as a result of the sequence of events that unfold in AR projects. This exercise produced movement – one we can implement and provide as evidence, albeit not always generalizable or scale-able, but the versatility remains embedded in AR practice and reflection, and the action cycles therein (Thompson, 2015).

### **People, Power, Politics**

*Key Terms from RQ: group learning, individuals and organizations*

*Key Quotes: “is anyone from management going to be present at this meeting?”, “...best thing to have happened to me in the five years of being here, I achieved more in those two hours than all this time at the organization”, “..we could have gone on for hours”*

An issue I recognized early on was to complement the learning environment by not overly pressurizing existing issues of ethics, power, politics and people (Pedler, Burgoyne and Brook,

2005). To nurture emerging ALS ideas, I factored in management acknowledgement and approval from the onset i.e. the preliminary spiral. This was necessary in order to cogenerate a democratized catalyst movement with appropriate political lobbying and organizational buy in (Björkman and Sundgren, 2005, Greenwood and Levin, 2007). To acknowledge and extract technical and intellectual competences and create new organizational capabilities was integral to the study and to promote this project while working alongside management (Dosi, Nelson and Winter, 2000, in Roth, Shani and Leary, 2007). Yet, a concern that has often cropped up in organizational learning is the defensive tendency of participants to protect oneself from possible embarrassment or exposure. While this was not visibly apparent through ALS phases, such 'anti-learning' (Argyris, in Fulmer and Keys, 1998) could have become dangerous organizational silence (Morrison and Milliken, 2000). Hence, I had to be mindful to not confrontationally bring in authority into the ALS, as made clear to participants since onset. Shared learning may or not occur during an interplay of power within ALS and this is debatable (Bunderson and Reagans, 2011). But resources, power, span of control or organizational status impacts how new learning is disclosed beyond the close coterie of colleagues with common interests (Bunderson and Reagans, 2011). Keeping your supervisors well aware of intended strides is not an option but a necessary partnership in planned ventures.

Critical thinking and reflection in ALS allowed participants to link their questioning insight to complex emotions, unconscious processes, relations and deliberately take on roles otherwise unavailable in traditional reflective practice. ALS facilitation is beyond supporting learners by challenging or changing the discourse; equally important is highlighting the ways participants resist or reinforce power relations developing from sheer inaction (Trehan and Rigg, 2015). An

ALS doesn't deny importance of relationships in human alliances, for even when a group is 'hot' at work on a task, interpersonal issues (do not disappear), just take a back seat (Leavitt, 1996). Traditional researchers often produce theory for practitioners to apply without consideration of the knowledge and knower (McNiff 2017, Zuber-Skerritt, 2015). So, there is true control in manoeuvring politics of knowledge and production by including actual practitioners, breaking down silos, giving them a voice and contributing to the larger body of information instead (Whitehead, 2018).

### 5.3 CRITICAL REFLECTION IN LIGHT OF PRACTICE

This section deals with concepts in the middle circle while being connected with those around. It also shows how these elements branch out to actual practice, and my own reflections on this process.

#### **Virtual Action Learning Set**

*Key Terms from RQ: group learning, structured intervention, communication*

*Key Quotes: "Being remote, I wasn't able to 'feel the pulse' of the room and wish I could, somehow."*

As previously reviewed, literature shows recent and emergent forms of AL to have incorporated a digital version while maintaining its original essence with learning as a vital component and outcome (Boshyk, 2016). Participants in this study had logistical inconvenience common to educational workplaces (conflicting academic timetables) and employees working with varied

teaching, student advising, or related tasks often make do with the idea of ‘working together apart’ i.e. using online communication as organizational norm (Kools and Stoll, 2016, Ratcheva, 2008). True breakthroughs in engagement and communication may be exceptional but this virtual aspect allowed everyone to continue seamlessly and convene digitally as a Virtual Action Learning Set despite being physically distanced (Bunshaft, 2018).

VAL is noted as being a rampant technological tool, and proved to be practical for this scenario to nurture the learning experience and focused on each participant and their individual issue as an information node (Dickenson, Burgoyne and Pedler, 2010, Salmon, 2013). We could integrate work-based learning ideas with theoretical tools of AL and it was possible to use VAL as a model therein (Raelin, 2000, in Gray, 2001). The advantages of digital dialogue meant capitalizing on the strength of exercising influence continually and generating ideas remotely (Kools and Stoll, 2016). What also occurred was the ability of the ALS and VAL systems to touch upon corporate philosophy using their intrinsic momentum and synergy. This was rendered possible by supports of learner-centric and technology-enhanced designs (Boshyk, 2016, Salmon, 2016). By carrying over virtually, conversation threads and interactions were retained as references since initially presented (Radcliff, 2017). This made the VAL phase smoother for most learners to thrive without time or place constraints and truly demonstrated how constructivism philosophy can integrate experiential understanding (Huang, 2002).

Virtualization of ALS as a hands-on model was effectively carried out in the DBA classroom and I sensed similar patterns unravel with lively discussions in this study. It offered a peek into the future and being in sync with ‘work from home’ situations during the global pandemic (COVID19); an event, which thrust virtual teamwork and self-reflection to online platforms, despite the

physical barriers (Heywood, 2020). While most Hot Groups develop serious synergy from face-to-face interactions, virtual Hot Groups whose members are scattered in distant geographical locales, are also known to contribute significantly via unique skillsets (Lipman, 2009). This is over and above the fact that virtual arrangement keeps down costs, time, and energy.

### **Creative Communication and Synergy**

*Key Terms from RQ: communication, organizational synergy*

*Key Quotes: "I heard 'xyz' speak about something like my own issue, can I talk to them to collaborate?", "I was talking to someone else and already came up with an idea"*

There has been real-life relevance stemming from inequalities typical of groups, workplaces and organizations that enabled this ALS Set to gain insight and display a range of emotional, political and social interplay (Trehan and Rigg, 2015). What allowed the candid behavior was a sense of freedom, personal engagement and ownership in the safe space. There was an underlying but unrestricted show of emotion, and especially so, when a member honestly shared a poignant moment that led to a shift in the overall room temperature and fluidity of conversation thereafter. This had undoubtedly set the tone for Set members and for future exchanges that would transpire. Such was the foundation of bonds forged that lent the ALS as a therapeutic, collegial and intellectual exercise to partake in (Norman and Powell, 2004, Attwood, 2007). Set members exhibited flexibility in knowing they could willingly and comfortably engage and not feel judged. These participants were academic colleagues first, but now, comrades in adversity (Attwood, 2007) treading uncharted waters together.

ALS has the reputation wherein those engaged in long running AL projects more willingly connect with their emotions than those reflecting independently, which is often secluded or emotionless (Shepherd, 2016). Along with candour came a sense that no one was held back by the pressure to perform or prove. There was a shift in physicality (actual room to virtual platform), and an avenue for individual styles to communicate, sometimes different when in person. This was a communication mind shift for many to capitalizing on best available assets (Coff, 2001). It recalibrated participants and demanded purposeful re-engagement between varied conversational settings for a growing environment of behind-the-screen-recluses (Shamsi, 2017). Participatory Action Learning combined with AR is known to create a holistic, integrative model incorporating participation, collaboration, communication, community of practice, networking, and synergy (Zuber-Skerritt, 2015, p. 2). Where this study extends the thought, is the ALS resourcefulness and flexibility to operate and collaborate beyond existing parameters to become a natural exercise for those involved.

### **Combustible Agents and Connected Leaders**

*Key Terms from RQ: leaderful practice, spontaneity*

*Key Quotes: "I found someone else's query had similar objectives as mine."*

Through fieldwork, I understood that collaborative or participatory ALS is not static but an ongoing, emergent genre of the AR realm and there have been several adaptations over time. The critical piece in these versions is the assumption that practitioners too, can create knowledge based on concrete experience from field, testing or trying another iteration while at it (Kolb,



1984, in Zuber-Skerritt, 2015). This enabled me to approach my ideas and contribution to the post-secondary education field with much more conviction and confidence.

What has informed such learning is that a group engaged in ALS is not a typical team assembled for programmed workplace operation. On the contrary, it is atypical, combustible and more likely a group to take on challenges. Set members volunteered to not only ameliorate self-learning and sharing but were willing to redirect action when given a chance. And in the course, several participants pleasantly discovered untapped potential and partnerships within (Lipman-Blumen and Leavitt, 2009). This emerged as a distinctive consequence of the 'intrusion', a direct positive impact and a gift of cohesive ALS interaction; an area not probed enough and insufficiently researched in the management realm as noted earlier.

In piecing together organizational perspectives of efficiency and chemistry, individual competencies play a significant role especially of those breeding in a charged environment (Rozman and Kovač, 2015). There was mainstream conversation in the ALS as part of the structured component, but just as in any other meeting, there were also side conversations stemming from the Set, that seemed to have occurred amongst those who found common ground. This event in the ALS that nurtured such mushrooming discussion, as exhibited in the Ladder of Inference adaptation (Fig. 4.3), was owing to a combination of both, specific and common knowledge. Although there was some vertical movement on these ladders, often associated with the tentativeness to absorb available insight (Larcher, 2007), these were progressive steps taken via experiential education as the change catalysts started to move about (Raelin, 2009). Participants carried this out sequentially albeit unknowingly while starting at the bottom of the rung to climb or reassess their situation, a step at a time and an inch higher, to an

action or decision at the top of the rung. It took some the courage and required combustion, before taking flight and moving beyond the restrictive precincts of a formal meeting. These fledgling ideas and initiatives displayed positive group think with a sense of urgency gained from Set momentum and 'aha' moments (Bong and Cho, 2017, Lipman-Blumen and Leavitt, 2009).

Only this time, the momentum was from tempered grassroots leadership, as against voices that normally emanate top down (Dee and Leišytė, 2016, Kezar et al, 2011). This showed a real capacity in the ALS corroborating Mary Parker Follett's remark in noting that a leader's foremost duty was to create more leaders and how reflective practice hones professional development (Norman and Powell, 2004). There was an awareness (for participants, and for myself, as researcher), that ALS conversations are nurturing, liberating and involve an action that supports oneself to redeploy to the next level by factoring in resource or systemic barriers. This step pointed to collective leadership and intellectual capacity building found within ALS interaction (Argyris, 1993, Gentle, 2007) reflecting a certain synergy, dynamism, and transient nature that is good for the hearts and minds of human beings involved (Lipman-Blumen and Leavitt, n.d.). In using the ignition from the group, action leadership had found a rightful place through democratic and collaborative guidance and self-developed leadership, thus eschewing hierarchical structures usually found associated therein (Darwin, 2017, Zuber-Skerritt, 2011). This aligns with ALS impact on leaderful practice, i.e. leadership emerging from social practices than existing as token or in a position i.e. also called 'leadership-as-practice' L-A-P (Darwin, 2017), Raelin, 2011). L-A-P did not and will not occur unless organizations are able to host and produce reflective exchanges making cultures receptive to it. As seen in this study, combustible

participants and leaderful practice essentially are two side of the same coin sharing values of authenticity, humility and dignity via meaning making (Raelin, 2014).

We now consider the concepts within the innermost circle that were found within the ‘scene of action’ in this study.

#### 5.4 THE INNERMOST CIRCLE



Figure 5.2 Filtering Theory to Action

In reflecting about practice there are three concepts closest to the action taken. While they are standalone, they each had scaffolding influences on the ALS experience. The core area adapted from the illustration i.e. a Model of Change (Fig. 5.1) is now visualized as a funnelling system that sifts through the most pivotal aspects of this study. As demonstrated in Fig. (5.2), the innermost circle informed

this evolution showing notions closest

to the scene of action or in action itself. The upper portion of the funnel denotes *ongoing change*,

*political climate or engagement* which are continuous while *leadership, synergy and action learning* in this context, become an intentional action.

Closest, most relevant to this study and implying action taken and the knowledge produced as a result, these notions include *organizational learning, innovation and disruption, and Hot Groups*. Each of these are now discussed in light of practice and as they relate to the research question.

### **Organizational Learning**

*Key Terms from RQ: foster organizational learning, learning organization*

*Key Quotes: "I respect this form of research being done; we need something like this",  
"Shouldn't we be doing this anyway, on an ongoing basis?"*

In examining a notion as broad and widely studied as this, only a nuance of organizational learning is considered here as it applies to the research statement and the sub question in this study. Educational learning spaces and institutions have the 'learning' component embedded as a core value and essential business function. This is also a workplace where recruited employees participated in AR and extended their habitual work-related tasks and issues. While being organized, I reflect on participant opportunity to experiment and somewhat *un organize* in moving away from formal structures (Lipman-Blumen and Leavitt, n.d.). As part of the organizational learning process, it attempted to entrench values and practices of *learning by doing* as an ideal form of organization, i.e. becoming a learning organization (Örtenblad, 2001). So, if the term 'organizational learning' were taken apart, the organization of certain learning activities determines the kind of learning that is taking place. And this implies the manner in

which willing participation yields engagement data, and how experimentation and innovation are being encouraged (Örtenblad, 2018, Kezar 2005).

While both terms *organizational learning* and *learning organization* are developmental processes, in this context, we are more concerned with *how* learning occurs. Specifically, how learning can be initiated, nurtured, embedded and sustained in a holistic way. In that sense, organizational learning is intrinsically connected to numerous elements found in the middle and outermost circle as previously exhibited in Fig. (5.1).

Discussed below are pertinent features that link my reflections with such learning from this study:

#### *Creating conducive climate*

As noted earlier, literature refers to institutional and organizational capacity using a Community of Practice which is an exercise in autonomous inquiry as a group (Coghlan, 2011). This has moved organizations from isolated individuals to more informed collaboration (Herr and Anderson, 2014) and aligns with the study mainstay i.e. an opportunity to afford such an environment for interested stakeholders. It is in tune with the approach of a learning organization definition that alludes to learning structures (Pedler et al, 1991).

#### *Knowing versus Knowledge*

In organizations that learn, there is implied learning, and it is key in reminding us the true nature of AR. There is a renewed focus on the organization assuming the role of a genuine entity where any individual learning without such organizational dimension becomes meaningless (Örtenblad, 2018). More interesting is the newer perspective of organizational learning, where knowledge is

actively conceived and nurtured in individuals who engage in such practice. Hence the viewpoint that prefers the term *knowing* instead.

#### *Learning and feedback, one way or other*

It has been argued that despite the choice in terminology (i.e. learning organization or organizational learning) or objective of each, they operate on the premise that all learning is good and remain well and alive as theoretical concepts (Pedler and Hsu, 2019). Reciprocity and collaborative spirit guide these ALS transactions. The dynamic process of dialoguing and healthy critique is aimed to improve performance. Hence the environment in a learning organization, functions as feedback that is essential to any learning process (Darwin, 2017).

#### *Sustainable Reflective Practice*

We have considered how ALS affords the participants reflective opportunities at every stage, individually and as a group. Participants who are naturally and intellectually curious about their work, persevere to reflect on their experience - often via participation in a CoP where the safety net of trust and psychological comfort are high. For such individuals, learning organizations can become permanent hosts, where reflective practice flourishes and nurtures sustainable learning communities over time (Kearney and Zuber-Skerritt, 2012).

#### *Information and Communication Technology*

Among other factors discussed (organization, people, knowledge), an indispensable force that draws in energy to support the exercise in a learning organization is the incorporation of technology (Darwin, 2017). The term 'ICT' has the words *information* and *communication*, suggesting that learning is always implied. With the study's virtual ALS, it was apparent how these

critical sub systems were necessary to harness the power of distanced communication while strengthening learning communities (Kools and Stoll, 2016, Ratcheva, 2008).

## **Innovation and Disruption**

*Key Terms from RQ: innovative practices, spontaneity*

*Key Quotes: “I am confident this can be a practical, intellectually stimulating, hands on exercise to advance board room discussion to on site action more fluidly.”*

A sense of newness prevailed in the group led dialoguing. The ability to break monotony, reminisce, and infuse thoughts with unbridled creativity and transformative power that supports self-determined change and thereby, better engagement (Bushe, 2001, Watkins and Cooperrider, 2000). While textbook definitions of disruption mean making old things obsolete, and innovation suggests applying or doing the same things in a better fashion, the common denominator for both involves “doing new things” (Merriam-Webster’s collegiate dictionary, 11th ed., 2003). As well, entrepreneurship and innovation are intrinsically related as both involve the processes of discovery, evaluation, and exploitation of opportunities (entrepreneurship) and novelties (innovation).

Disruption embraces destruction and creativity in the same stroke, and always involves innovation, thus implying *more* with more thinking (Hambleton and Howard, 2013), or a sense of discontinuity (Brown and Osborne, 2012). In leading change, nurturing the first few followers as one’s equal is turnkey; they can transform the lone ‘nut’ into a leader and make it a movement (Derek Sivers, TED talk, 2010). The ALS also aimed to tap into any disruptive innovators, empower them enough to move beyond organizational limitations and look closer at in-house discovery (Lepore, 2014). As observed with one member who pursued the project (new faculty on boarding

guide), there was a ripple outside Set precincts. With continuous improvement in mind, the exercise involves employees in innovation processes via cumulative team contribution (Bessant, Caffyn and Gilbert, 1996). Through a complex but inventive journey, it is possible to see unique creativity that was actionable and employee performance (Amabile, 1997, Jain et al, 2015, Demyen and Ciurea, 2016, Shamsi, 2017). Idea implementation since inception, produces movement in organizational learning (West et al, 2004).

AL can benefit organizations in shaking it up and making stakeholders more amenable to innovation (Pedler, 2012). The method to the madness however, lies in exploiting innovation as a source of competitive advantage and flaunting it as a process and outcome (Crossan and Apaydin, 2010). Innovation is often steered by leadership, communication and culture (Bushe, 2013, Gumusluoglu and Ilsev, 2009, Lee, Olsen and Trimi, 2012, Pedler and Abbott, 2013, Raelin, 2011), and upon reflection, this may have occurred in spurts throughout the period of the ALS. Some of the emerging ideas (academic related projects, scholarship and research, departmental operating manual) may not have materialized without managerial support or funding opportunities. Much of existing research on innovation points to practice embedded firmly in theoretical and academic work, while only limited phenomenological studies exist (Crossan and Apaydin, 2010). Hence there is scope to inspect ALS energy that fed the 'push' and 'pull' in this case i.e. the disruption and innovation forces.

Discussed in the following section are key take away from this dynamic:



### *Grass roots Intrapreneurs to Innovative Disruptors*

Innovation can take shape at grass roots with active encouragement, and this can nurture intrapreneurs to work beyond organizational paradigms (Antoncic and Hisrich, 2003). Beyond identifying players, giving them a voice and platform can be critical as observed in the ALS. Often it is in habitual exercises that owners of wicked issues confront them, take responsibility and seek solutions as a way of life (Willmott, 1994, in Trehan and Rigg, 2015).

### *Core Values*

To understand how nurturing an incubator works, one can look closer look at institutional values that instil divergent thinking, remain purposeful, and perpetuate over time (Brockner and James, 2008, Chandler et al, 2000, Herbig, 1994, Khazanch et al, 2007). In this case, with post-secondary educational institutions, an advantage is continuous reflective practice and professional development. Core values are indispensable because educators used them in the ALS to start discussions; and these same values continued to guide and drive the Set to newer possibilities.

### *Education Innovation*

Having discussed the strengths of using AI, seeing *the best of what is* led to unravelling hidden capacity i.e. appreciative leadership to shape education innovation (Orr and Cleveland-Innes, 2015). This 'giving of life' to a system by searching for the best in people or the world around is critical, especially when organizational learning pauses or saturates for any reason (Cooperrider and Whitney, 2005). The innovation bottom line focused on what works best is most successful when it comes from individuals rather than singular voices from afar, because only then, do accountability and seeking solution follow (Herr and Anderson, 2014, Whitney, Trosten-Bloom and Rader, 2010).

### *Transformation*

Along the disruption continuum, comes innovation, and the impact of such interplay always brings modification, i.e. transformation. Literature has alluded to transformational leadership attributes and transition management (Gumusluoglu and Ilsev, 2009, Wittmayer and Schöpke, 2014). Additionally, because AR is inquiry done *by* or *with* insiders, transformation occurs within such settings or among participants themselves (Herr and Anderson, 2014). My organization's vision '*to transform the lives of communities through education*' is reflective of innovative exercises earnestly undertaken by participants.

### *Social Engineering*

The ALS intervention represented a form of social engineering (described by action researcher Maria Mies, cited by Chisholm, in Herr and Anderson, 2014). Upon reflection, innovation directly impacts the building of social capital and intellectual capacity of organizations (Argyris, 2002, Gentle, 2007, Tsai, 2018). Fundamental to social interaction needs of AR, which feed innovation, this study was an ecosystem offering interactive experiences while being entangled (Greenwood and Levin, 2007, Saunders, 2014). These could be called efforts in social innovation, as is known in management jargon (Schubert, 2018). The underlying truth is the dependency and networking of what become robust relations.

The final part of this reflection involves the most energetic element of the inner most circle and the confluence of a variety of ideas that manifested from fieldwork. Hot Groups is the nucleus, with strands running far and deep, connecting all other notions directly or indirectly, like a hub

and spokes of a wheel. And as an integral part of the study, it is worthy of exclusive treatment and in connecting my work to address gaps recognized along the way.

### **Hot Groups**

*Key Terms from RQ: innovative practices, spontaneity, synergy, creativity, group learning*  
*Key Quotes: “I am present because this is refreshing and mentally stimulating”, “This provided us with a sounding board”*

This empirical study combined various elements that were close fits with each other. Along with ALS and AR, using AI’s 4D model followed naturally. This was blended with my fascination of tempered radicalism (Meyerson, 2008) i.e. being a positive deviant in my DBA ALS encounters by bringing a willing, infectious and adaptive attitude to the learning experience. From this, arose the idea of paving way to invite and nurture ingenious associations like the Hot Groups phenomenon that ignites innovation (Lipman-Blumen and Leavitt, 1999) and result-oriented thought-action loop (Argyris, 1993) in everyday organizational life.

As seen in earlier chapters, a resourceful group that seems combustible and enterprising may be a team or given no name (Zich, 1995). Nonetheless, it could possibly evolve into something more (Bacharach, 2014). Hot Groups can separate power from specific people to converge on ideas that shake things up. Strengthened by the arguments that when organizations move isolated individuals to a Community of Practice (CoP), using the AR backdrop, this effort pivoted spontaneous individuals (otherwise working in the periphery) to centre stage (Herr and Anderson, 2014). Prevailing clique or collectivism mentality also empowered some participants to achieve shared outcomes as a result (Pearce and Wassenaar, 2014).

Highlights of the Hot Groups phenomenon as they related to this study are shared below:

#### *Operational Speed and Sustainability*

Hot Groups are known to be speedy, usually short-lived and not meant to last forever and this was true of some side projects within the ALS (Lipman-Blumen and Leavitt, 2009). The combustion simmered after tasks were achieved and the effect tapered off (academic research, departmental project, etc.). Associations faded away once their purpose achieved and this was a double-edged sword; members felt connected so long as the task was underway. However, since there wasn't a real need to extend such relation(s) post ALS, they did not try to artificially outlive said life cycle (Lipman-Blumen and Leavitt, 2009). It would have been curious to see if a project had a long term or phased approach, and the specific Hot Group would have also then prolonged its shelf life accordingly.

#### *Transferable and Adaptable*

An array of features was exhibited by such groups. As ALS offshoots, they remained infectious in their approach to trying novelties, they focused on their pursuit, helping make sense of existing organizational processes so they could deftly dismantle or reconstruct social order. This showed resiliency, and a certain knack to adapt and alter along the way. Hot Groups itself, maybe an amalgamation of the Japanese teams' approach and an audacious American start up mentality (Lipman-Blumen and Leavitt, n.d.), however, they portray an inherent and unanimous urge to question and push boundaries of hierarchy and organizational norms. Their compliant nature makes them ready for any situation and hence become suitable to an AR environment where each spiral was a new adventure.

### *Resourceful and Single-minded Focus*

Members of Hot Groups typically are institutional change agents who can necessitate an intellectual transformation where actions speak aloud (Meyerson, 2007). ALS participants who successfully parlayed their thoughts into tangible projects were the organization's tempered radicals who exhibited identities and values different from the majority existing culture while seamlessly fitting right in (Meyerson, 2008). They skilfully roped in resources in a timely way. Some harnessed the power of being online and evolved into a virtual Hot Group to keep the flames burning beyond physical boundaries (2009, Llipman). Also, Hot Groups remain captivated by the task, a characteristic that speaks to their commitment and steadfastness (Lipman-Blumen and Leavitt, n.d.). With ongoing work obligations, some ALS participants willingly took on such additional challenge and showed how issues they had identified and owned, truly mattered. Some were wary of management buy in, others factored in partnership and timeline impediments, and remained true to their intent of digging deep.

### *Managing Crossroads*

Literature speaks of 'Crisis Response Teams' as being institutionalized when organizations must deal with unusual and time sensitive issues needing immediate attention (Paraskevas, 2006). Effective Hot Groups could be the same, as they cleverly navigate critical predicaments with minimal constraints (2009, Llipman). While crises management maybe delegated, Hot Groups remain homegrown, comprising those familiar with their organizations. In this study, the smaller factions were ready when needed, thanks to their institutional relations and relevant networks. This was in tune with some of the projects that needed to build up more speed and deliver what was urgent (Lipman-Blumen and Leavitt, n.d.).

### *Unapologetic Bravado*

“AI involves the art and practice of asking questions that strengthen a system’s capacity to heighten positive potential” (Orr and Cleveland-Innes, 2015, p.17). In this case, AI forged ties with a distinct feature of Hot Groups by making inquiry unapologetic, deliberate, and it streamlined individual strengths to unleash participant creativity. In doing this, we became privy to new possibilities enabling the ALS to connect and match talents to projects (Orr and Cleveland-Innes, 2015, Saunders, 2014). I found this to have deepened my understanding and embracing constructivism where participants actively co created their own knowledge, and their reality was determined as a result of their learner experiences. There was a brash yet conscious attempt at active learning with all acquired knowledge a product of participants’ cognitive act, versus bland passive transmission (Narayan et al, 2013). This showed how Hot Group members function at will and their performance tendency stems from unbounded bravado; it is a state of mind (Lipman-Blumen and Leavitt, n.d.).

## SUMMARY

This chapter highlighted some of the experiences and lessons from my perspectives of post data analysis and iteration of action(s) taken. It also considered the dynamics within, specific outcomes and emphasis on select terms that moved the study from a macro to a micro lens, that led to presenting a 'model of change' at my organization. Research can truly serve as a lubricant for social action and to this end, the study moved away from how things should be to how they *can be* (Glassman et al., 2012). I strived to improve practice by thinking critically and practically about a problem (than just theoretically), and allowing the logical flow from research to result, thus appreciating the combination of action and research stay true to its meaning and intent (Duesbery and Twyman, 2020). This critical inspection was a result of the evolution since having conceptualized and operationalized my research focus. Actions taken during and after field work provided an opportunity to reflect more critically on lessons learned and what they meant not only to me as a researcher, but to the participants and the organization as well.

The following chapter offers a discussion on how the actionable knowledge from this study compares with participants' perspectives. As a result, topics that can be pursued and integrated for future adaptation are noted under areas of further study in this realm. By sharing the knowledge within and suggesting practical application and steps in the concluding chapter, it will have embraced the process of democratizing research and educational practice through reciprocity (Holly et al. 2009) and contributing my informed knowledge as it relates to the larger body of work in this field and specifically within the context of community college.

## CHAPTER 6: ACTIONABLE KNOWLEDGE

### INTRODUCTION

The learning capability of this study allowed connections to be made on diverse fronts, from socio-cultural, political, technological and similar elements, to filter into actionable knowledge. A relational understanding was made possible to extend existing practices and inform future course in the realm of learning for individuals and organizations as a whole (Antonacopoulou, 2007). This chapter explores the context of a community college environment and educators being study participants who are supported by actionable research in order to move from theory to practice to reflective knowledge (Raelin, 2001, 2009). Then, it compares my reflections with those of the study participants in the generation of such knowledge, which is followed by 'Principles for Action' that offer guidance on such work moving forward, within the context of community colleges.

### 6.1 AR WITHIN AN INSTITUTIONAL (COLLEGE) CONTEXT

This section considers AR in relation to educator practice and how being situated in a community college environment strongly emphasizes participation and accountability. AR's reputation in pragmatism has touched numerous fields including business and management, nursing or leadership, and educators remain enamoured by its influence in classroom practice (Brooke and Pedler, 2020, Clark et al, 2020, McNiff, 2017). This is largely tied to its fundamental accountability and shared practices without externally mandated norms, making it more transparent and less



removed like traditional research. Personalizing issues and then customizing solutions by embodying our own experiences makes AR more tenable to stakeholders and firmly roots it in the business of education as in this study. These strands had become apparent in the iterations since the onset of ALS and is discussed below:

### **Collective experience as Educators**

The reasons for opting the AR route have been previously examined via literature review, and it is also a natural fit when viewed from an educational lens. Taking an applied standpoint, college education positions itself as being hands on, employable, experiential and links individual interpretation to group or organizational level integration wherein, knowledge is tied to practice (Dee and Leišytė, 2016). Not only does knowledge inform practice, but practice clarifies and refines knowledge, and this is where AR can improve such learning, it can also simultaneously advance it through new ideas, both one's own and those of others. Finally, it can justify the contribution made for one's own understanding and others (Linda Darling-Hammond et al, 2020). There is concerted change-oriented action because AR assumes a practical form of inquiry producing individual accounts that are shared with all for mutual benefit (McNiff, 2017). The fact that AR nudges participants in this study to view teaching or working in educational institutions as inquiry, demonstrates the value of engaging educators as active participants in education research. Therein, the sustained professional learning activities when they are together in a CoP like setting is aimed at rendering research into practice (Clark et al, 2020, Pedler, and Hsu, 2019).

### **Interactions as Comrades and Co researchers**

Learning as a social process is achieved through collective action marked by practice-based framework (Dee and Leišytė, 2016). And in this setting, participants knew each other, so the

familiarity of the environment and issues added to the collaborative spirit kindled by common adversities; an open mindset was an added advantage (Attwood, 2007). It was also evident, that working with situations we routinely face, are those we must navigate habitually, be it independent or together. How we make sense of it and show ways to overcome, is a step in acknowledging we can own it and participate in opportunistic research (Coghlan, 2014). The initial ALS was a moment of reconciliation, a relief that no one was alone and that the commonest of issues wouldn't be taken lightly. These were building blocks for the Set to forge trust and relations.

## 6.2. GENERATION OF ACTIONABLE KNOWLEDGE

This section outlines the learning from fieldwork informed my thinking, and how these have shaped the recommendations. Some of the similarities and differences between my personal view of knowledge created and those of participants are also discussed:

- Several anecdotes recreated my DBA classroom moments, but I played the role of Set facilitator, learning to exercise conscious restraint and not unduly influence people or dialogues. Establishing ties with parties exhibiting mutual interests is one way of harnessing power (Ireland and Webb 2007). However, I was conscious of being objective than to drift to a select few and be better aware of diverse perspectives including innovative catalysts and silent observers with independent agenda. Participants were encouraged to go about their business and not to be concerned of my presence.

- In addressing questions around management presence at ALS, I reflected on the notion of leadership and using the holistic term 'leaderful' (Raelin, 2011). Revisiting my *field notes* for sequence of events, instead of making (mis)assumptions on participants during set interaction, I uncovered the source of actionable items and contributions therein.
- Many participants agreed on the technological, interpersonal, intellectual, creative capital and innovative flexibilities of ALS. But as an insider researcher I could also observe how learning ability was enhanced by being together and when apart to guide transformative moments experienced and acknowledged (Bong and Cho, 2017, Wilson et al, 2021). In time, I witnessed how some minds and projects aligned spontaneously, while others preferred their independence. This was unconscious for participants, but the ALS was a conscious disruption to foster shared awareness, discovery and moments of high impact, visible engagement in the AL experience (Trehan and Pedler, 2010).
- As educators, participants were familiar with operating in Communities of Practice that are held together by intrinsic learning value (while teams are bound by a task). But although they perform tasks together, it doesn't define them. Participant responses allude to this, yet, unknowingly and instinctively, they may have operated as Hot Groups.
- In evolving from living within bubbles of self-created worldviews that invariably influences our decisions and actions, this study offers an extension to the idea of participatory and Lifelong Action Learning (LAL) (Zuber-Skerritt, 2018). For participants it was a fleeting, lived experience, to me it was "learning practice as a form of fluid, dynamic and emergent self-organization" (Antonacopoulou, 2007, pg.2).

- Participant willingness and mutual acknowledgement of shared experiences became the overarching spirit of collaboration that aligned with a respectful and collegial environment. I had not expected such camaraderie which made it easier to facilitate and watch the synergy unravel. Those who operated alone, did not experience differently. For them, it was a solo reflective practice that they shared with others when given the opportunity. This, they were habituated to, as part of their profession.
- If the ALS were prolonged, participation may have fizzled in my opinion, because short, purposeful meetings with definite outcomes seemed sensible to most. However, many participants openly wished for more such opportunities; the objective of which would be to share (and not necessarily produce results), which is an integral aspect of learning.

### 6.3 STUDY INSIGHTS

Having discussed emerging factors as a result of findings and how they remain grounded in theory, the following section discusses possibilities going forward, given commonly found barriers that such organizations are known to face. Suggestions are made as potential contribution to existing work and with a lens into how learning can be nurtured for both, individuals and the organization in the context of community colleges.

#### **i. Knowledge Conversion System**

The reciprocal relation between what individual organizational members learn and what the organization as a whole learns is driven by the processes and tasks that promote such learning (Dee and Leišytė, 2016). It is seen how several structural and cultural characteristics of colleges

and universities can inhibit learning at the organizational level and while post-secondary institutions are learning organizations, systematic problem solving and internal knowledge transfer remain weak. Such organizations must look at overcoming hurdles by way of seeing learning as being possible, desirable and effective (Kezar, 2005).

Assuming we will forever remain connected and that there will always be perennial issues through which we must work our way out together in a networked world, the method to refuel to a better future is through creators and entrepreneurs (Saunders, 2014). Knowing that we must confront the entangled connectedness is an important first step. Smaller issues will be habitually faced and the contribution is significant when we use 'thin slicing' or tackling the portion we can control (Gladwell, 2006). While literature speaks to breeding organizational incubators and intellectual capacity, this study has explored ideation with emphasis on the selective, controllable elements, while recognizing linkages (Ezzat et al, 2017). For every sliver of an issue, active learning and responding outside our bubbles is necessary. Social innovation or piecemeal social engineering occurs when incremental improvements are designed to fix specific problems and not necessarily everything (Schubert, 2018). This area of taking on a project at a time and embracing potential remains unexplored in the ALS context.

AR demands some form of intervention that engages in a spiral of necessary actions for knowledge gained from within must be fed back into the very system, making research truly transformative (Saunders, 2014, Herr and Anderson, 2014). While several authors have spoken about how knowledge development and conversion thrive in rich social interaction and its deep positive relation with social innovation (Darwin, 2017, Urban and Gaffurini, 2018), we also know untapped potential means wasted human resources. Disillusioned participants often become

cynical or *disengaged*. Organizations can meaningfully support and *re-engage* members by using existing strengths to convert as learning moments for all.

ALS facilitation of such experiences lies in creative communication and grassroots synergy. In other words, future research can evolve effectively when innovation successfully connects the action (*praxis*) with the managerial and academic theories (*practice*) by integrating agency (*practitioners*) (Crossan and Apaydin, 2010). The relationship between innovation and organizational learning is profound when knowledge conversion breeds feasible domino effects (Urban and Gaffurini, 2018). Most areas of work involve “an extent of prior knowledge that usually influences the formation of new knowledge” and an active learning process therein (Narayan et al, 2013, pg. 1). But how, where and when participants bring in previous insight to co construct spaces and modify it to generate new knowledge is turnkey. The purposeful implementation of a structured ALS intervention, to nurture and transform knowledge is worthy of exclusive investigation. Among the salient features of a learning organization that align with the ‘action-oriented’ dimension of this study, I found these particularly significant- creating and sustaining a continuous learning opportunity, promotion of team learning, nurturing a culture of inquiry and innovation, and embedding knowledge exchange (Kools and Stoll, 2016).

## **ii. Hot Groups Concoction**

The study offered a preview of a version of Hot Groups. The argument in favour of this phenomenon reflects its role as a creative, speedy, flexible form of collaboration, as catalysts of individualistic albeit group transformation. Yet, only a handful of these have successfully thrived or flourished widely because its eclectic mix of players and the misnomer they are radically

different, becomes both a strength and shortcoming (2009, Lipman). Hot Groups revel in disturbing the established order, moving away from stability and standardization, embracing risk, and persistent change, while fighting off the façade of 'young institution' (Lipman-Blumen and Leavitt, n.d.). But as observed, expertise, age or gender did not have any direct correlation with providing individuals opportunities to stretch beyond limits or voluntarily move forward in collegial ways.

This ALS started from scratch and built in layers, on fragments of issues that seemed to nag participants. In the process, they forged natural ties with those they aligned with vis-à-vis creativity, convenience, synergy, or other. It is well taken that Hot Groups may not necessarily help individuals satisfy all their needs or motives, but they give participants chances to strive toward high-relief, "peak experiences" (Lipman-Blumen and Leavitt, n.d., pg. 8) as seen in some stories that emerged.

The usefulness of ALS across industries is evident, but there's a dearth of work in post-secondary education that links to creative innovation via entangled connectedness, knowledge management, or Hot Group like behaviour. Most Canadian community colleges have played a critical role within larger lifelong learning networks in their communities, often positioning themselves as catalysts and activists (Gallagher and Day, 2001). Herein, the study nudges practitioners to critically reflect and further contribute to Argyris' and Raelin's relevant works to evaluate learning processes and resultant actions through reflexive practice (Stewart and Alexander, 2007). From an organization's core value and integrity standpoint, it involves

providing a supportive environment for Hot Groups and not dismiss their work as perfunctory or baseless which kills both their freedom and fight (Lipman-Blumen and Leavitt, n.d., pg. 13).

### **iii. Virtual Action Learning**

Online implementation of the study was partly possible because of scheduling ease, participant comfort with ed-tech tools and to maintain continuity of sequential AR cycles. The new age adaptive platform was a compelling prospect to discover how AL could flourish seamlessly. This tool accommodated educators who fully understood virtual cooperation, digital revolution, blended and online learning as classroom normalcy. More currently, working together apart syndromes of virtualization as a new organizational lifestyle has never felt truer in pandemic era that pushed every sector into it (Kools and Stoll, 2016, Ratcheva, 2008).

As an emerging variety of AL in the early '2000s, its virtual spinoff has since succeeded in convening geographically dispersed individuals and those across time zones, improved and contributed to networked learning (Pedler, 2011, Dickenson, Burgoyne and Pedler, 2010). It has managed to remain flexible, lower costs, pace oneself, prove less disruptive to ongoing schedules and shape learning agenda as well (Stewart and Alexander, 2006). These factors corroborate the constructivist ideology that involves making meaning from experience-based knowledge, with action as the central theme (Merriam and Caffarella, 1999). Lipman (2009) notes how the world of academia once housed an extraordinary example of Virtual Hot Groups each working from a geographical location, spawning more over time, exchanging 'DNA' or resources as needed. The flame was kept burning in dispersed locations (geographically and organizationally distinct institutions) and the large primary virtual Hot Group effectively fuelled its off shoots that worked in a face-to-face manner.



This study provides discussion points and scope in combining the virtualization of AL with Virtual Hot Groups and how as a dynamic model, it is not practised enough. Literature is limited in speaking to Hot Groups, and VAL is evolving. Given the post pandemic remote and hybrid workstyle we have gradually embraced over time, there will only be increasing evidence of how organizational learning continues in varied situations, including at a distance.

#### 6.4 PRINCIPLES FOR ACTION

Presented in this section is a set of suggestions for scholar-practitioners who may wish to undertake a similar route in applying AL to tackle organizational issues. The below principles speak to the four basic management pillars i.e. *planning, organizing, leading, controlling*, reflecting generation of actionable knowledge (Principles of Management, 2015). The management functions speak to a more modern practical framework and contribute to the larger body of work in the realm of action learning, research and practice:

- **Conscious Intervention (planning)**

Simply being an educational environment does not imply continuous learning. As seen as in this study, a concerted effort to reflect on shared innovative practices within a structure is needed, to set things in motion within existing systems. It is argued in this study that unless a planned method to navigate and nurture exists, learning remains disjointed. An intervention can manoeuvre and curate insight otherwise confined to cubicles.

- **Shared Space (organizing)**

A mandated and secure meeting ground for participants becomes a learning haven. This space, that is not habitually available in many organizations, functions like an incubator for test drives, and to learn from errors and feedback. 'Social Innovation' hubs and incubators are maybe plenty (as part of institutional research) but an organized platform to facilitate a routine shared learning process can make iterative learning and research seamless, with no separation between action and reflection. This can nudge movement on the scale of theory, practice, research, improvement (Zuber-Skerritt, 2018).

- **Incubation Time (leading)**

As observed, issues were ingrained in fundamental institutional objectives and practice (ex. 'student success', 'faculty wellbeing') but they also held a time sensitivity owing to participant's evolving nature of work and inability to forge ahead without consultation. The time required to come together and use the design (AR) and the tool (ALS), from idea to fruition, is critical for participants. Learning institutions must consider gestation and energy entailed in processes. This factor can incentivize and lead experiments to be improvised on or adapted subsequently.

- **Success Criteria (controlling)**

Trustworthiness is essential to make research recognized as familiar and understood as legitimate by others (Lincoln and Guba, 1985, in Nowell et al, 2017). Evidence for study credibility was made possible by using a systematic process for coding data (Appendix H) in which statements were analysed and categorized into themes representing the phenomenon of interest (Creswell, 2014). Systematizing a logical record of all fieldwork (Appendix G), peer debriefing and drawing themes and ideas from a range of experiences (which are often meaningless when viewed

independently), captured recurrent and unified meaningful views reflective of the entire research (Nowell et al, 2017), thus making the study dependable and verifiable. With growing accumulation of local knowledge, the generalizability of AR gained from post-intervention insight makes the work relevant and transferable (Huang, 2010).

In considering the Principles for Action, I was able to link my own understanding of a present-day scenario with the relevance of a century old interpretation of the notion of innovation management (of Henri Fayol's) as being the fundamental foundational pillars in this context (Hatchuel and Segrestin, 2019). It is hoped that scholar-practitioners will engage more closely with these key milestones along the life cycle of such a scenario. The careful inspection and interplay of these elements can go a long way in designing, breeding and producing a coordinated learning mechanism within organizations.

## SUMMARY

This chapter considered some critical and integral factors for the generation of actionable knowledge in this study. These components helped revisit my field experiences, contributed to gaps in the existing body of work and also took a peek into post-secondary education within the community college context. The exercise of self-assessment, my initial position, my objective of undertaking such an inquiry and my status vis-à-vis distributed leadership in a group setting and considering participant perspectives, were each significant in aligning actionable knowledge and as a result, acknowledging the intellectual capacity therein (Meyerson, 2003, in Attwood, 2007). Through this process, asking myself about how realistic and applicable the approach was, helped me to reflect more intentionally by using inquiry and practice (Pedler, 2011). For me, it has meant, researching constantly, improving practice, and moving beyond what is known to actively seeking insight in relation to others' realities. This lesson in AR allowed me to look at an issue more closely and objectively than hurriedly or dispassionately.

The concluding chapter offers a summary of this study including highlights, limitations and future considerations.

## CHAPTER 7: CONCLUSION

This study was essentially a research of self-experience (McLaughlin and Ayubayeva, 2015) that permitted a deep dive into cognitive confusion, ever-changing scenarios and definitive movements in the organizational learning context. Juggling theory and practice is not new for me and the nature of my role as faculty and researcher in a community college but translating it to a leadership one by capitalizing on participant engagement and reflective practice, was a compelling dimension. Judi Marshall's life lessons for a scholar practitioner existence underscore such merging of life and research boundaries, and for me, they brought out thematic similarities of both worlds (Marshall, 1999).

In presenting the final chapter, recommendations and considerations in local and geographic contexts, and study limitations are discussed. This organization is a specific, complex, dynamic workplace with evolving educational learning practices. It continues to be a wealth of resource for qualitative design. In essence, this attempt only seemed to skim the surface and yet yielded tremendous insight to better understand management research and how learning in an organization occurs. And keeping the momentum obtained from this experience it can launch future spirals (Rickards et al, 2014).

The opening section summarises the study with a brief recap, outcomes and impacts. Facets of the guiding research statement explore participant synergy, engagement, creative learning capacity during structured interaction and if or how they were supported in their learning.

## 7.1 SUMMARY

Organizations adapt to change within ongoing structured routines (Sandberg and Tsoukas, 2015), which results in reactions ranging from organizational silence (Morrison and Milliken, 2000), to ethical hurdles or confusion in interpretation, or sometimes, layered thinking (Björkman and Sundgren, 2005). Employees imbibe organizational norms but also initiate organizational leadership or *leaderful* behavior to keep innovation alive (Raelin, 2011). Interestingly, in my workplace, failure to collectively pause and recognize team synergy implied a need beyond traditional or token engagement techniques that dwell on deliberation, identifying deficiencies, or re-emphasizing power and politics (International Inst. for Sustainable Development, 2001). By exploring participant experience of a structured ALS using a strengths-based approach to support spontaneity associated with Hot Groups that can inject bursts of innovation (Lipman-Blumen and Leavitt, 1999), my study focused on embedding a result-oriented, thought-action loop in habitual organizational life (Argyris, 1993). Participants included workplace faculty and administrative staff who volunteered over a few months to collaborate and discover their own and group learning, in this hands-on approach to help inform the study.

### **Contextual Considerations – *the initial backdrop***

As a workplace reality, AL involves collective thinking, and reflexive critique that is best pursued in community because we must factor in how our learning impacts and influences those who we meet (Weick, 2003). Systematic rational scrutiny allowed more robust reflexive learning on my part and it became apparent there were gaps in what I perceived as a problem and if and how *others* considered the same as a problem at all (Johnson and Duberley, 2003)? This led to

exploring how wicked issues were identified and seen by those around me at workplace and if commonalities emerged in such reflection.

An area of significant interest was acquiring informed sanction of participants no matter their position, tenure or background. It had to do with my position as insider researcher and gaining secondary access and or denial to confidential information (Björkman and Sundgren, 2005). Walking this tight rope of observing, gathering data and acting as a bridge to facilitate AR intervention for obtaining desired results was challenging (Williander and Styhre, 2006). Initially, not everyone fully understood what this 'experiment' entailed. In many ways, even I, as a researcher, watched the process unfold, with the participants.

Being cognizant that this study could be easily dismissed, openly criticized, outright rejected, or called ambitious academic hogwash, was critical to my journey (Coghlan and Brannick, 2014). These reactions may have been strategic coping mechanisms to protect personal diffidence, defiance or refrain from being unmasked ethically and politically. While no one can foresee or visualize project outcomes (often because organizational mission, vision and objectives are pitched high and lofty), the tangibility of AR was a valid hurdle given its length and iterative nature that could aggravate already vulnerable nerves of many. As well, presence of select superficial members as active participants (Adler and Adler, 1987, in Brannick and Coghlan, 2007) or dangerous organizational silence (Morrison and Milliken, 2000) existing in silos could impede the purpose of intervention. Finally, colleges as institutions do not always function by consensus; participatory decision is usually viewed as after-thought in corporatized structures (Tinberg, 2009) and this was observed in my organization as well. To host an ALS is one thing, to use those

learning moments and convert to real projects involves nod from management, often stalling the true spirit of taking action. As is known, organizations are constantly seeking to bring two ends of any spectrum closer, and as would be considered rational, observe decisions made on one end, in relation to workplace impacts on the other (Drucker, 1967).

### **Change Orchestration – *identifying an opportunity***

Implementing this study involved an ALS intervention, which meant there would be change. Knowing “change occurs one person at a time” (Blanchard, 2008, pp.3) speaks to the rate at which strategic change in academia is being brought about in today’s world. The many rounds of unfreeze-move-refreeze along the equilibrium continuum (Cummings, Bridgman, Brown, 2016, Isabella, 1990) until such time the group found its comfort zone, meant I had to find and exploit a window of opportunity. It was imperative for me as a researcher and colleague, to better understand how and why groups stagnate, saturate or escalate before getting comfortable. These snapshots would become rich visual and intellectual resources like a concept map that outlines dynamics and subtleties between key players in any scenario (Rowley and Slack, 2004).

In exploring how educational institutions tap into managing knowledge, the exercise provided a glimpse if such learning practices and environments could sustain and breed talent pools (Kinley and Ben-Hur, 2014). As an intentional orchestration in organizational programming, the study aimed to note individual participant learning curve in relation to that of the group’s (Porter and Kramer, 2006). It aimed to study two ends of a spectrum closer, i.e. decisions made on one end and its portrayal via actions taken, in actual workplace, on the other. As educators and lifelong learners, supporting workplaces as habitual living systems is critical, so organizational learning



opportunities remain accessible, current and valuable. Disruptions may not always mushroom overnight, but in my opinion, the notion can be ingrained consciously and meaningfully.

### **Buying In – *from query to curiosity***

It takes effort to engage with the old and the new, make collective sense (Weick, 1985), or attempt to understand *why* we do *what* we do (Katopol, 2013). There was a considerable mind shift for participants and me in this endeavour. What was apparent from the onset was the navigation around thought-action patterns to efficiently complement workplace dynamics without aggravating existing politics, confusion or stress (Pedler, Burgoyne and Brook, 2005). Just as instructors implement a midterm classroom evaluation using a ‘stop, start, continue’ style feedback solicited from students, the preliminary meeting (Appendix A) offered me insight to consider a more formal implementation. I found that if management research could kindle knowledge production by using the twin ammunition of academics and practice (Tranfield and Starkey, 1998) then the formula would also fit well for a community college environment. Additionally, with the support of ALS sensemaking, leadership could be developed in a new shared space as an extension of daily life and teaching practice (Antonacopoulou and Bento, 2004).

### **Deconstructing Structure - *shaking things up, together***

With an aim to not just describe or clarify a current situation, but to alter it (Argyris et al., 1985, in Friedman, Razer and Sykes, 2004), the study was intriguing, inspiring and exciting all at once. Participants convened in person and virtually, to deconstruct issues, and embrace *must* know conundrums (Cresswell, 2013) as opposed to urgently and blindly fixing problems and predicting

outcomes as one would be tempted to do. The biggest takeaway for many was the presence of a trustworthy and forgiving sound board that fostered confidence to openly share real experiences, critique and remain fellows in opportunity as (Mumford, 1996). Through active assessment, the positive banter forced them to consider consequences from various points of view than remain blindsided (Monroe, 2014). Indeed, the future can repeat the past, and our understanding of biases can alter it, and to this end, the Set interaction allowed to 'clean house' i.e. consider previously gained knowledge, before reconstructing or rethinking anything new (Lebaron, 2010). And through this, many capitalized on prevalent strengths and identified best practices. This encouraged a practical way to conduct business in a modern complex organizational set up.

#### **Questions, More Questions, More Discovery – *probe induced projects and partnerships***

In several conversations, my biases of conducting insider research, or being too close to the data (Coghlan, 2001) were ably cross examined via scrutiny and Q-posing of Set members, since firm relational trusts were established (Pablo et al, 2007). The weight watcher's analogy bodes well here: Set members deliberately acting to alter and support the ways we conduct life or work, and this intention to change being bolstered by the combined strength and commonality of challenges faced (Attwood, 2007). Many participants seemed to be dealing with similar situations and it was comforting to know they weren't alone and that others' experiences may inform their own, that this challenging process with appropriate backing could lessen their frustration or it would allay fears of experimenting more willingly. Well intended probes to refine problem statements helped participants to realign going forward. The slight hesitance that may have initially existed (owing to unease in new setting) was gradually overcome by way of sharing.

A sense of pragmatism prevailed in the Set by following a set of scaffolding questions to learn from action-based patterning (Freeman 1984, in Steyn and Niemann, 2010). Many were motivated by being known for questions they would ask, and not the knee-jerk responses they may have provided when pushed into 'solution seeking' mode that is prevalent at workplace (Arneson, 2013, Starbuck, 1983). As a budding leader, one needs to build versatile questions to kindle creative streaks. However, most participants were also caught because they didn't take executive decisions as part of their professional roles i.e. they were faculty or administrative support staff. This served as a good reminder that we could somehow, as a group, influence organizational imperatives by strategically integrating interpersonal competencies and build agency (Day, 2000).

To this end, some noteworthy projects emerged from the ALS, while a few continued to brew in the pipeline. There was positive collaboration among those who sensed an urgency- this meant working on the side lines or even bullishly as members of Hot Groups do (Lipman-Blumen and Leavitt, 2009). Such connections made were fruitful, albeit, short term, but a sense of accomplishment and purpose had prevailed. Set members reminisced over the final meeting on their personal and professional intersections, and this to me, reflected the nature of genuine ALS camaraderie over time.

In the following section, recommendations are noted as actionable steps to be considered when speaking of educational workplace contexts or in a multicultural realm of Ontarian institutions since most community colleges serve a similar function and comprise diverse workforce. To see how these findings may be further adapted within institutional contexts of a workplace, one must

remember that although the physical setting of this study is educational, the treatment remains organizational.

## 7.2 RECOMMENDATIONS

Based on analyses of findings offered in previous chapters, the following is a set of practical implications for the future, in this fast-evolving context of an academic milieu. The suggested ideas reflect organizational practices that aim to shift and adapt AL models using a sustainable and structured approach that practitioners may consider. Future studies can explore the following areas -

### **i. Evaluate organizational learning systems**

We need to change the way we think before changing the way we behave and for this, taking stock of existing systems is important (Bushe and Kassam, 2005). Literature in this area validate the merging of theory and practice in engaging the community in higher education. Individual and group learning support organization can change related actions when stakeholders in in tune with the process (Purcell, 2014). Preparing and setting the stage for an intervention is equally important as implementing it. As well, more real time approaches are needed to explore and alleviate top-down power dynamics and exacerbate tensions between faculty and administrators (Dee and Leišytė, 2016). Leadership, effective communication, active collaboration and ample time for deliberation can ably support organizational learning within college systems (Jones et al, 2014).

Power dynamics do play a role in organizational learning in post-secondary institutions and it speaks to a gap addressed previously in this study i.e. facilitating knowledge conversion by

creating a conducive environment at workplaces. This study had the advantage of having educators as participants and so reflection as part of professional development came easily to most. This factor make learning processes smoother when they were endorsed, embedded and encouraged from within the organization.

## **ii. Identify technological and human capital**

In higher educational institutions, shared governance committees often provide learning spaces that foster democratic dialogue and emancipatory learning. However, studies grounded in the unique characteristics of colleges and universities can throw more light on how informal social networks and Communities of Practice can foster organizational learning and change (Dee and Leišytė, 2016).

Without a doubt, one of the most pertinent elements relating to our present world and social or professional interactions (be it structured or spontaneous) concerns technology. This resource has changed and even enhanced the ways in which we operate and learn. In person and virtualization work in tandem, making the work experience wholesome and less isolating. The other side of this coin and essential to the success of an intervention is to recognize existing strengths and enabling those human interactions that will breed the co-construction of new realities (Stewart and Alexander, 2006). Communities of Practice may host conversations around specific teaching practices, while social networks can bring together faculty and administrators who wish to improve educational outcomes for students. But more attention is needed to understand how we can meaningfully develop and impact organization-wide learning by exploiting these assets, in both the short and long terms.

### **iii. Create shared spaces**

Hierarchical relations present a barrier in learning in higher education systems (Kezar, 2005). Community college leaders can increase capacity for organizational learning and change by amply supporting these initiatives via suitable resources such as time, money, effort and interest (Webb, 2018). A sense of willingness to create shared and safe spaces with proactive communications can become an indispensable foundation for intentional organizational learning that can especially provide stability during times of disruption and change. A shared learning space needn't simply exist physically, but more so for cogenerating a democratized catalyst movement, one that supports inward communication (Greenwood and Levin, 2007, Steyn and Niemann, 2010). Organizational thinking space is indispensable for creative dynamics to occur. Formal operational meetings do not achieve this, nor do token Community of Practices where structure is far too streamlined, they remain task bound and are mandated externally or perfunctorily. The responsibility for learning is a shared one and it lives and breathes outside of silos (Bechtold, 1997, in Burnes, 2004, Stewart and Alexander, 2006). How else can one see networks form, or experiments take flight, or ideas incubate!

### **iv. Nurture smash-the-box kind of thinking (Saunders, 2014)**

As a follow up to the recommendation of creating shared learning space, unstructured and uninhibited conversations need to be actively and purposefully supported. These go beyond entrepreneurial thinking, to spontaneous ingenuity that disrupt and keep creative juices flowing (Saunders, 2014). Encouraging this means allowing Hot Groups to flourish, self-regulate, and individual eccentricities to proliferate; aspects organizations claim to hold in high regard yet become apprehensive or reject unthinkingly (Lipman-Blumen and Leavitt, n.d.). Allowing a

genuinely open and uninterrupted pathway to flatten the hierarchical structure through full participation of its members can reflect true organizational intent (Orr and Cleveland-Innes, 2015). Consciously allowing employee voice to be heard via their active engagement, can help realise the value of forward-thinking initiatives (Bunshaft, 2018). Most social or learning innovation hubs are start-ups or young business ventures, with little scope for organizational learning, research and innovation space to gather and ponder on everyday work and improvements to take back and practice. But by probing the potential of learning and synergy between high energy and keen learning leaders, this study also helped reveal varied levels of participant self-awareness, commitment and curiosity (Jain et al, 2015, Pyser and Winters, 2018).

### 7.3 LIMITATIONS

This section outlines some of the constraints of this study and draws attention to areas that need to be considered in future iterations or adaptation of this work. While these limitations did not appear particularly burdensome to this study, they could be game changers in future implementation or when generalizing for situations outside of a community college setting.

#### **Time and Presence**

One of the main concerns in AR and often repeated feedback from participants indicated a lack of time- either allocated or available to this exercise. While all partook willingly, it must be remembered that this demanded substantial time commitment on their part, over and above workplace obligations. Several participants struggled to reflect, contribute and stay networked through the ALS exchange and interactions on a regular basis, much as they would have liked.

Also, the study had to be completed within the turnaround period of an academic college term, lest further change in schedule affect meeting schedules or willingness to participate.

It has been observed with VALs that a commitment of 'presence' of participants is worth exploring i.e. how they share their undivided focus to the ALS when in a remote setting which is different, than being physically present with everyone in the same space (Keating, 2022). It is a known fact that picking up non-verbal cues when online or hybrid is far more challenging to facilitate, compare to participants using a similar modality to collaborate in unison. Being present together intersperses such elements more organically in a conversation (than online or hybrid).

### **Context**

Learning was context driven and flourished from an organizational standpoint thanks to prior experience of participants who routinely engaged in reflective practice as part of workplace practices in teaching and learning. Participating faculty remained anchored to classroom issues from the start to the end, and this made the ALS environment seem more purposeful thanks to having a common ground i.e. student-centricity. This work is specific to situations when ALS members enjoy prior comfort and familiarity with each other, have shared topics and are able to readily jump in with thought-action-reflection patterns, to allow a free exchange between them. Some were able to work on the side lines to a more heightened level such as when Hot Groups start taking form. But if the issues or topics were different and a mix of academic and non-academic or even outside the classroom focus ex. administrative, the ALS context(s) and focus may have easily changed for different participants.



## **Homogeneity**

The study was exclusive to a department where the I, as a researcher, worked and my presence as ALS facilitator emphasized familiarity and smoothen operations from the start. There was an inherent trust factor that worked in its favour. However, arranging this for a wider, more heterogenous group across the organization would be vastly different even if I tried. In responding to subsequent calls of interest to arrange ALS discussions outside of the department, it was observed that conflicting schedules, diverse nature of interests and a range of topics would need a slightly different treatment and commitment altogether.

## **Task Accomplishment**

There exists the risk that a project completion becomes more significant or noteworthy than the genuine reflective process entailed. Such is the nature of the group learning process and so in the absence of feedback, AL can become just another day on the job. The purpose and experience of being and functioning in an ALS can sometimes become lost owing to factors such as weak probes on a given issue or project shared by a participant, or the lack of synergy or reflexivity about impacts on those around (Pedler, 2012). Also, at times, Hot Groups can tend to become powerful, overwhelming or all important too soon, leaving behind other people or ideas that couldn't do likewise. On hindsight, some projects were discussed by participants more frequently or in depth than others' issues, both inside and outside of the Set because of sheer momentum gained and urgency of feedback needed.

## Resources

This study needed some back staging elements: from management support and sponsorship, to physical space and logistics (audio video conferencing software), adherence to protocol and approval systems for broadcast, recruitment and communication. A manager implementing this intervention would face different or fewer challenges than an employee faculty researcher such as myself, who undertook it with limited decision-making power. My attention was on many surrounding factors, which meant multi-tasking and walking fine lines in these situations to make ends meet and do my research intentionally.

## 7.4 LOOKING FORWARD

In an environment where organizations merely address functional or operational aspects of business than the practice of managing themselves (Mintzberg and Gosling, 2002, in Volz-Peacock, Carson, and Marquardt, 2016), AL provides a feasible approach for leaders to learn while working (Volz-Peacock, Carson, and Marquardt, 2016). AL is individual, collaborative, and resides in work-based professional learning with numerous evolving forms and styles making it a culture of learning in organizations (Pedler, Burgoyne, and Brook, 2005, Zuber-Skerritt, 2018). Using the twin lenses of organizational learning and innovation, and connected leadership as they coexist in a complex environment, this experience has woven the threads of new knowledge creation to deal with messy problems that surround us. Armed with this awareness and attitude, I sought to utilize information gained from within to enhance individual and organizational learning, specifically in areas that affected my specific work commitment and its long-term

influence (Bourner, et al 2000). Research as inquiry is carried out *by* or *with* insiders, then transformation occurs therein, among participants or researchers themselves (Herr and Anderson, 2014). After all, institutional improvement is not always driven by pure data but is rather a reflection of the wisdom and commitment of its practitioners (Dee and Leišytė, 2016). We live, play and function today in a 'post hero world', meaning that the sooner we realize we cannot arrive at solutions by living in silos, the closer we will be achieving them together; by smartly moving from investment to impact (Saunders, 2014).

AR proceeds differently from traditional research and I was able to reflect on the criticality of repositioning my ignorance of the unknown and closely observe each iterative cycle of thought-action-reflection evolve (Greenwood and Levin, 2007). Jointly agreeing to treat the cause (not just symptoms) was a continual process that tapped into divergent thinking, long term embryonic activities such as journaling, narrating and actively exploring instead of choosing robotic cruise control (Kelley and Kelley, 2014). As I now understand, AR aims to go beyond explaining status quo, it attempts to change it and it is an oscillating continuum (Argyris et al., 1985, in Friedman, Razer and Sykes, 2004, Paraskevas, 2006).

This study attempts to add a layer to alter programmed knowledge by paying attention to the possibilities that arise from within a Learning Set i.e. via established interplay of those participating. Tapping into work synergy, allows organizations to be inclusive, communicate creatively and collaboratively disseminate information (Carmeli and Schaubroeck, 2008). Synergy can also do wonders in effecting positive outcomes like creative sensemaking from plain cognitive disorder (Luscher and Lewis, 2008, Srivastava, 1987). The reminder that "change should be done

*with people, not to people*" (Blanchard, 2008, pp.9) highlights quantifiable outcomes, accountability and organizational values that combine hearts and minds to be stretched beyond the monotony of daily routines, to voluntarily achieve something difficult and worthwhile, in a way that Hot Groups exemplify (Lipman-Blumen and Leavitt, n.d.). Disrupting norms and pushing boundaries can be a bold and timely action and this study can provide more insight from an AL point of view. Any effort in the realm of learning involves living it. This also includes tensions that facilitate or preclude transformative experience from knowing to becoming (Yeo and Marquardt, 2015). Organizational employees were actively immersed in education and learning, inside and outside of classrooms, no matter the role they played in this study. But being provided a platform to vocalize their perspectives made them comfortable to soak in the experience, relentlessly pursue their journey, or construct their own identity and value system (Porter and Kramer, 2006). Organizations learn, and in the larger scheme of things, how they do, is key. When organizations tap into its assets they gain on precious real time options, AL can build competency for future work (Coff, 2001, Shanahan, 2018). By way of consciously integrating its components to suit the nature of lived realities and experiences, stakeholders benefit immediately or over time as seen in this journey. Ultimately, one must be willing to endure the chaos brought forth when new knowledge is gained from unfamiliar areas (Coghlan and Brannick, 2014). To this end, I am equally vigilant of a new cycle of sensemaking that must be undertaken as a result of this experience.

*"The more I live, the more I learn. The more I learn, the more I realize, the less I know."*

*- Michel Legrand.*



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# APPENDICES

## Appendix A

### Framework for Preliminary ALS, Centre for Organizational Learning and Training's *Graduate Studies Cohort (January 2017)*

#### **ACTION LEARNING**

Action Learning (AL) is an approach to the development of people in organizations which takes the task as the vehicle for learning. Based on the premise that there is no learning without action and no deliberate action without learning it has three main components-

*\*people- who accept the responsibility for taking action on a particular issue;*

*\*problems- or the tasks that people set themselves; and*

*\*a set of 6 or so colleagues who support /challenge each other to make progress on problems*

(Pedler, 1991: xxii–xxiii)







AL can take a variety of forms- often closely interwoven with other organizational interventions such as organization development (OD), management development, team building, and transformative learning.

#### **What is an Action Learning Set (ALS)?**

Meant to be a relatively safe laboratory for learning, participants meet in small teams, also called 'Sets'. Through social interaction, set members surface and take advantage of alternative views on their problem. Because the problem is difficult to resolve, Revans (1982) refers to group members as 'comrades in adversity'; Mumford (1996) calls them 'fellows in opportunity'. Sets always work on a problem based in real work. Action learning sets (ALS) are widely used to support individual and team development, particularly those in senior leadership position.

## Learning Set Reflection/ Preparation:

- At the end of each Learning Set participants communicate what action they hope to achieve before the next meeting
- Share if there is any particular question posed in the ALS which encouraged them to think differently about their current approach to the project
- Between Set meetings each participant is charged with the responsibility of *taking action*, learning from the results and reporting back
- Set facilitators encourage participants to connect via online or alternate methods (between face-to-face meetings) to promote early commitment and engagement

COLOURED HAT	THINK OF	DETAILED DESCRIPTION
	<b>White paper</b>	The white hat is about data and information. It is used to record information that is currently available and to identify further information that may be needed.
	<b>Fire and warmth</b>	The red hat is associated with feelings, intuition, and emotion. The red hat allows people to put forward feelings without justification or prejudice.
	<b>Sunshine</b>	The yellow hat is for a positive view of things. It looks for benefits in a situation. This hat encourages a positive view even in people who are always critical.
	<b>A stern judge</b>	The black hat relates to caution. It is used for critical judgement. Sometimes it is easy to overuse the black hat.
	<b>Vegetation and rich growth</b>	The green hat is for creative thinking and generating new ideas. This is your creative thinking cap.
	<b>The sky and overview</b>	The blue hat is about process control. It is used for thinking about thinking. The blue hat asks for summaries, conclusions and decisions.

*“If you wait for opportunities to occur, you will be one of the crowd” - Edward de Bono*

Dr Edward de Bono introduced a simple, but powerful technique called the Six Thinking Hats. The technique outlines different thinking styles that are associated with a different coloured hat. This parallel thinking approach forces each of the participants in a team meeting or focus group to adopt the particular thinking style represented by each coloured hat. By conceptualizing each type of hat, the person focuses on the style of thinking associated with each colour. For example, when wearing the RED hat a person will state what he or she feels about a particular situation. Wearing the YELLOW hat compels people to think about

the positive aspects of a topic or situation, while the GREEN hat encourages people to adopt a creative thinking focus. The Six Thinking Hats encourage even the most pessimistic or negative people to think of the positive outcomes of a given situation.

A summary of each hat is outlined in the Figure above. By adopting the **Six Thinking Hats** technique in meetings or problem-solving sessions, participants have found that they achieve a number of outcomes, including:

1. Efficient meetings where meeting time is cut by one to two thirds of traditional meetings
2. Productive meetings with solid outcomes generated from different thinking styles that can be explored further
3. Quickly identifying alternative solutions to problems
4. Effective thinking techniques where participants experience different perspectives using parallel thinking

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### **Resources and Links:**

[www.online.liverpool.ac.uk/programmes/doctor-of-business-administration](http://www.online.liverpool.ac.uk/programmes/doctor-of-business-administration)

[www.bbk.ac.uk/lod/mandev/What\\_is\\_an\\_action\\_learning\\_set\\_webversion.doc](http://www.bbk.ac.uk/lod/mandev/What_is_an_action_learning_set_webversion.doc)

[www.bond.org.uk/data/files/resources/463/No-5.1-Action-Learning-Sets.pdf](http://www.bond.org.uk/data/files/resources/463/No-5.1-Action-Learning-Sets.pdf)

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Joyce, P. (2012) Action Learning- a process which supports organisational change initiatives. *Action learning: research and practice*.

Pedler, M. (ed.) (1991) *Action Learning in Practice*, 2nd edn. Brookfield, VT: Gower.

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Appendix B  
Recruitment Poster

## **ACTION LEARNING SET**

### **CALL FOR PARTICIPANTS**

### **Research Study**

A hands on group investigation that will allow you to innovate, collaborate and synergize in an *action learning* based environment using the tenets of appreciative inquiry.



*Image from Zen & The Art of Appreciative Inquiry: A glass half full approach to organizational development by Rowett, R. (2012)*

#### **WHY**

Articulate, innovate, co create  
Move beyond problem solving  
Capitalize on assets

#### **WHO**

SHTCA Faculty & Staff

#### **WHEN**

Two Phases: Feb & Mar 2018  
\*In person discussions (2 hrs each)  
\*Interim online discussions (biweekly)

**INTERESTED IN PARTICIPATING OR  
WANT TO LEARN MORE?**

#### **CONTACT RESEARCHER**

**Sowmya Kishore**  
Doctoral Candidate, University of Liverpool

## Appendix C



### **DBA Thesis: Participant Information Sheet**

Action Learning Sets as structured intervention to foster organizational learning and innovation.

You are invited to participate in a study that will take place in your organization. This document provides you with some important information on the purpose and specifics of the study. Please review this information carefully to make sure that you understand it. Remember that you do not have to take part in the study and you can withdraw from it anytime without any penalties. If you have any questions, feel free to ask them before accepting to participate. Thank you for your time!

#### **Purpose of the Study**

This is an empirical study conducted by Sowmya Kishore, the Primary Investigator (PI), to examine participant experience in a structured intervention such as an Action Learning Set (ALS) by using Appreciative Inquiry (AI) techniques. This study entails PI's Doctoral research undertaking (DBA, University of Liverpool) and does not pose any conflict of interest with PI's other professional role as faculty at this College. Constant change in workplace environment demands increased adaptation on part of employees whilst simultaneously imbibing organizational norms or initiating effective organizational leadership behaviour. However, failure to collectively pause, identify or reinvest in internal capacities and expertise often results in *disengagement*, lack of communication or team synergy. There is a dire need to move beyond traditional participatory engagement that dwell on dialogue, deliberation or focusing on deficiencies. This study will engage participants via Appreciative Inquiry (AI) in a structured environment such as an Action Learning Set (ALS) (Revans, 1981)<sup>1</sup>, to encourage spontaneous, innovative and collective result-oriented thought-action loop (Argyris, 1993)<sup>2</sup> behaviour into everyday organizational life. It is suggested that increased and sustained collaborative and reflective thinking can elevate us from conventional deficit-based problem solving to a more realistic recognition and exploitation of the best of *what is* (Ashford and Patkar, 2001)<sup>3</sup>.

#### **Why Have I Been Chosen for the Study?**

All employees - (faculty and staff, full or part time) of my department, at said Community College, are eligible and welcome. A minimum of 8 and maximum of 10 employees will be recruited on a first come first serve basis. Should sufficient numbers for the study not be reached, the invitation will be extended to other Schools within the institution.

#### **Do I Have to Take Part?**

Participation is voluntary- you are free to withdraw at any time.

### **What Will Happen If I Take Part?**

The exercise entails either a homogenous or heterogeneous group of up to 10 participants to engage in the opposite of problem solving i.e. offer a collaborative, flexible and strategic reflective process to build cooperative and innovative learning capacity that can trigger an infectious positive domino effect to achieve common or shared targets as comrades in adversity (Attwood, 2007)<sup>4</sup>.

The process will have two distinct phases, spread over a period of 3 months in the Winter 2018 term-  
*Phase I – February 2018 (2 hours)*

Participants will engage in an 'Action Learning Set' (ALS) environment to focus on the first 2 'Ds' of AI (discover and dream), using self-interview and collaborative narration of workplace issues and aspirations as either an 'open' session (based on mutual member agreement) or pre-determined (shared objectives).  
*Interim Online ALS:* to keep the conversation going, participants will continue their discussion as a virtual asynchronous collaboration (online ALS)

*Phase II – March 2018 (2 hours)*

Participants cover the remaining 2 'Ds' of AI (design and deliver), and elaborate on their movement since Phase I in the in-person ALS group setting

*Concluding Online ALS:* opportunity to capture closing thoughts, next steps. Participants will complete a short post survey to explore how they felt during and after conclusion of the structured intervention.

### **Expenses and/or Payments**

Participants will be provided mild refreshments during both in person meetings of the study to compensate for their time and interest.

### **Are There Any Risks in Taking Part?**

Potential of mild embarrassment or discomfort owing to sharing personal trials and tribulations may exist when collaborating in an ALS environment. Participants will have the opportunity to debrief in written or spoken form, post group discussion, or seek institutional support via counselling services if at all required.

### **Are There Any Benefits in Taking Part?**

The experience of sharing and engaging in a group environment can often be liberating, eye opening, generative and supporting to ALS members. The viral effect of Appreciative Inquiry has been found to infuse members with more positive engagement and energy that becomes a transformative tool for individuals, groups and the organization as a whole in long term contexts.

### **What If I Am Unhappy or If There Is a Problem?**

If you are unhappy or face an issue during the course or after the study, please contact the Primary Investigator and the institutional Research Ethics Board to discuss the same. All due measures will be taken to ensure your comfort, willingness and overall satisfaction as a participant.

### **Will My Participation Be Kept Confidential?**

Both phases of the study will be facilitated by the Primary Investigator and audio recorded for ease of transcription and analysis. All material will remain confidential, stripped off personal details and anonymized for research scrutiny and final report. Research material, relevant recordings and survey information will be stored in a secure, password protected computer of the PI for a period of 5 years, and deleted and destroyed thereafter.

### **What Will Happen to the Results of the Study?**

Results of this study will be shared at the Department and College wide educational meets, annual applied research conferences and for furthering the agenda of the Centre for Organizational Learning and Training and related academic publication. Should you be interested in the results, please contact the Primary Investigator directly.

### **What Will Happen If I Want to Stop Taking Part?**

Participation is voluntary- you are free to withdraw at any time. If you choose to withdraw, all relevant information recorded up to that point will be discarded.

### **Who Can I Contact if I Have Further Questions?**

Should you have further questions or concerns regarding this study, please contact the PI or the College Research Ethics Board.

#### **Primary Investigator**

*Sowmya Kishore*, Faculty

skishore@college.ca  
416.289.5000 x 2318

#### **Research Ethics Board**

Edward Cruz (Co Chair, REB)

ecruz@college.ca  
416.289.5000 x 8451

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<sup>1</sup> Revans, R.W. (1981) 'The nature of action learning', *Omega*, 9 (1), pp. 9-24, Science Direct.

<sup>2</sup> Argyris, C. (1993) *Knowledge for action*. San Francisco, CA: Jossey-Bass.

<sup>3</sup> Ashford, G., and Patkar, S. (2001) *The Positive Path: Using Appreciative Inquiry in Rural Indian Communities*.

<sup>4</sup> Attwood, M. (2007) 'Challenging from the margins into the mainstream – improving renal services in a collaborative and entrepreneurial spirit', *Action Learning: Research and Practice*, 4 (2), pp.191-198, Education Research Complete, EBSCOhost.



## Appendix D



### COMMITTEE ON RESEARCH ETHICS

#### PARTICIPANT CONSENT FORM

**Title of Research Project:** Action Learning Sets (ALS) as structured intervention to foster organizational learning and innovation

**Researcher:** Sowmya Kishore

Please  
initial box

1. I confirm that I have read and have understood the participation information sheet dated \_\_\_\_\_ for the above study. I have had the opportunity to review & consider information in the ALS 'FAQ' Brochure, ask questions, and have had these answered satisfactorily.
2. I understand that my participation is voluntary and that I am free to withdraw at any time without giving any reason, without my rights being affected. In addition, should I not wish to answer any particular question or questions, I am free to decline.
3. I understand that, under the Data Protection Act, I can at any time ask for access to the information I provide and I can also request the destruction of that information if I wish.
4. I agree to take part in the above study and maintain confidentiality of all ALS participants and all information shared during the course of such in person and online discussions.
5. I understand and agree that my participation will be audio recorded and I am aware of and consent to your use of these recordings for the purposes of focus group and online ALS discussion forum analysis, data compilation and report generation.
6. I understand that confidentiality and anonymity will be maintained and it will not be possible to identify me in any publications.
7. I agree for the data collected from me to be used in future research and understand that any such use of identifiable data would be reviewed and approved by a research ethics committee.
8. Study report with analysis and recommendations will be published and shared as a report at Centennial's applied research conference, COLT agenda and programming and internal circulation; please indicate whether you would like to receive a copy.

Participant Name	Date	Signature
Name of Person taking consent	Date	Signature
Sowmya Kishore	Feb 28, 2018	
Researcher	Date	Signature

Researcher Sowmya Kishore  
Work Address: 940 Progress Avenue, Toronto  
Work Telephone: 416.288.5000 x 3338  
Work Email: skishore@centennialcollege.ca

Version 2.0 Dec 2017

Appendix E  
**ALS Interview Guide**

**PHASE I**

**In person - Feb 28, 2018**

**DISCOVER (valuing)**

Present your 'issue' or workplace 'challenge': describe the current, the best of '*what is...*'

1. What do you love most about this job? What drew you here that has encouraged you to stay?
2. What has been a high point of your individual involvement with the College? Why?
3. Share with us about a time when you were part of a collaborative group that achieved amazing results in the face of many challenges. What enabled you to work together so well?
4. Which of your strengths and talents were called upon? What did you learn?
5. What do you especially value: about yourself as a contributor, your team and your organization?

Weeks 1-2: Reinforcing learning, QandA: recap of issue and *what is*

**DREAM (envisioning)**

Imagine a time in the future when people look to our organization as an exceptional example of a thriving, attractive institution where you are an engaged leader and the imminent owner:

1. What would your 'ideal work environment' look like? What would you ideally be doing? With what kind of people would you be working?
2. In this exciting future, what kinds of systems and structures are sustaining such excellence?
3. What does success look like? Why is it important?
4. What is true of organizational leaders, faculty, staff and resources making such change happen?
5. What are you most proud of having helped the organization accomplish?

**ONLINE FOLLOW UP (Feb-Mar 2018)**

Weeks 3-4: Response post to specific questions, recap and connect to your 'dream'

## ALS Interview Guide (contd.)

### PHASE II

ONLINE - March, 2018

#### DESIGN (dialoguing)

Now bridge between the current (known, *what is*) state of the organization and the future (imagined, desired, *what might be*)

1. What motivates you to do the work you are doing now? List factors likely to sustain your involvement?
2. What specific new strategies do you want to set to inspire your best contribution this year?
3. What resources or skills do you need to draw attention to this investment and meet them?
4. Who might be interested in partnering with you in this shared construction? Why do you think they would be interested?
5. How realistic and bold is your design- is it provocative, innovative, desirable, participative?

Weeks 1-2: Reinforcing bridging: connect *what is* and *what might be*

#### DELIVER (co-implementing)

True translation of *intent to action* through innovative implementation, strategy, partnerships, communication and sustained learning

1. What's the first thing that's needed to make your strategy happen? What are the next steps?
2. How will you recruit your colleagues into getting involved? How will you strengthen your work environment towards this goal?
3. Who will provide leadership to this effort? How will you support ongoing action and success?
4. What have you learned about this workplace so far that suggests you could make a significant contribution to its collaboration and synergy?
5. What would you most look forward to contributing?

#### IN PERSON CONCLUSION (Mar - Apr 2018)

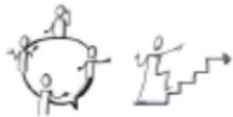
Weeks 3-4: Response post to specific questions, outline action plan, identify partners

## ALS: Reflection & Preparation

- ✓ At the end of each set meeting communicate what action you hope to achieve before our next meeting
- ✓ Share if there is any particular question posed in the ALS which encouraged you to think differently about your current approach to the project
- ✓ Between set meetings you're charged with the responsibility of taking action, learning from the results and reporting back
- ✓ You're also encouraged to connect via online or alternate methods (before our next in person ALS) to promote early commitment and engagement

## Bibliography

- \* [www.online.liverpool.ac.uk/programmes/doctor-of-business-administration](http://www.online.liverpool.ac.uk/programmes/doctor-of-business-administration)
- \* [www.bbk.ac.uk/lod/mandev/What\\_is\\_an\\_action\\_learning\\_set\\_webversion.doc](http://www.bbk.ac.uk/lod/mandev/What_is_an_action_learning_set_webversion.doc)
- \* [www.bond.org.uk/data/files/resources/463/No-5.1-Action-Learning-Sets.pdf](http://www.bond.org.uk/data/files/resources/463/No-5.1-Action-Learning-Sets.pdf)
- \* Joyce, P. (2012) *Action Learning*- a process which supports organisational change initiatives
- \* Pedler, M. (ed.) (1991) *Action Learning in Practice*, 2<sup>nd</sup> ed. Brookfield, VT: Gower.
- \* Revans, R. W. (1982) *The Origin and Growth of Action Learning*. London: Chartwell Bratt



Sowmya Kishore  
Faculty

# ACTION LEARNING

*an alternative to traditional organizational interventions*

## FAQ & Guide



## SOWMYA KISHORE

Primary Investigator (Thesis Research Study)  
*Doctoral Student, University of Liverpool, U.K.*



### Action Learning (AL)

An approach to people development in organizations which takes the task as the vehicle for learning. AL is based on the premise that there is no learning without action and

no deliberate action without learning. It has three main components-

- \***people**- who accept responsibility for taking action on an issue;
- \***problems**- or the tasks that people set themselves; and
- \***a set**- of 6 or so colleagues who support & challenge each other to make progress on problems (Pedler, 1991: xxii-xxiii)



### Action Learning Set (ALS)

Meant to be a relatively 'safe laboratory' for learning, participants meet in small teams

('sets'). Through social interaction, set members surface and take advantage of alternative views on their problem. Because the problem is difficult to resolve, members are also called *comrades in adversity* or *fellows in opportunity*. Sets always work on a problem based in real work. ALS are widely used to support individual and team development, particularly those in senior leadership position, and can take place either in person or online or both.

### Features of ALS

- Small Sets meet regularly to find ways of understanding
- Structured sessions with "air time" for individual issues
- Attentive listening, asking questions to help presenters better understand and begin to resolve the issue themselves
- Developing initial trustworthy cohesion, orderly debate and problem focus (than group process)
- Challenges/issues should not require specialist knowledge from set e.g. about a subject discipline
- Not about solving problems for others, but helping them resolve it themselves through effective questioning, reflection, and if appropriate, suggestion of options
- Skilled facilitator to ensure participant engagement
- Group diversity – profession, nationality, perspective

### Benefits of ALS

- First step in journey toward greater self-insight, learning from experience & increased awareness
- Shared learning, engagement, innovation, creativity
- Networking, capacity, knowledge & relationship building
- Specific focus on issues, special interest, or development
- Empowerment to deal with complex leadership, interpersonal & organizational issues not otherwise easily resolved through workshops, lectures or individual study
- Development of action plans, change and improvement in responsibility within area or across organization

## GROUND RULES

- ✓ Optimal time between Set meetings is 4-6 weeks to sustain & reinforce initial impetus & enthusiasm derived from 1<sup>st</sup> meeting
- ✓ Continue the conversation: asynchronous online ALS
- ✓ Everyone is active, engaged and alert through the meeting
- ✓ Broad topic criterion: *'anything that members want to work on to generate action points'*

## APPRECIATIVE INQUIRY (AI)

Unleash collective learning, appreciation & innovation via positive engagement & synergy



## ROLE OF PRESENTER (holder of problem)

- ✓ Describes issue of concern through narrative account
- ✓ Describe how it really is in the here and now
- ✓ Receive questions from others in the group
- ✓ Address **ONLY** those questions you're comfortable with
- ✓ Decide & share action points to take forward & commit to
- ✓ Report on ensuing events at a subsequent Set meeting

## ROLE OF SET MEMBERS (fellows in opportunity)

- ✓ Listen attentively and actively
- ✓ Watch for non-verbal cues, feelings and words
- ✓ Do not intervene
- ✓ Formulate questions that encourage presenter to understand his/ her problem more clearly
- ✓ Prepare to probe and challenge personal interpretations
- ✓ Offer supportive, empathetic, honest & discrete feedback
- ✓ **NEVER** judge, diagnose, recommend, interpose own agenda or values

---

### *Presenter's Aim*

*get personal learning out of session*

### *Group's Aim*

*discuss to encourage his/ her own learning*

---





**Virtual Action Learning Set 'A' - DISCOVER**  
**Mar 1-15**

**Participant 1**

---

**Problem Description: What is our attitude and action towards classroom disruption and mental well-being?**

B: Should we implement a stronger security system?

B: What about protocol system or mechanism to counter?

S: Have we revisited needs of the new building and systems therein (or lack of)?

S: Why is it important to consider this situation?

A: Will the policy be more effective if Professors share their perspective in the classroom to increase mental well-being?

**Participant 2**

---

**Problem Description: How do we support our students' mental health, while simultaneously developing resiliency and achieving learning outcomes?**

H: Can we look at embedding this into Essential Employability Skills?

M: Do we have a documentation system in place to address this?

D: Why is a student pressured to complete? Why are they entitled to accommodation or jobs?

S: Must we revisit the 2yr program (back to 3yr) and not compromise on timelines?

B: Do we look into student history?

### **Participant 3**

---

**Problem Description: How do we deal with plagiarism? Is it linked to behavior?**

S: Is behavior the bigger issue?

B: How do we get management buy in?

G: Are you prepared to make a student example and face the consequences?

H: Are you prepared to be consistent? Is consistency (lack of) the bigger challenge?

### **Participant 4**

---

**Problem Description: How do we handle lack of consistency in what concerns student accommodation, behavior, engagement?**

S: What have you done already? Does management have any answers?

M: How to balance this for faculty with or without job security?

D: What is the provincial standard for evaluations, penalty, do we own or compare to our local document?

B: How do we orient students to this?

A: How do we ensure that all faculty follows the same consistency, regardless of their status (ie contract/fulltime)?

### **Participant 5**

---

**Problem Description: With increased online learning courses, how do we motivate the Millennial Generation to engage in learning that is prone to disruption?**



## Virtual Action Learning Set 'B' - DISCOVER Mar 1-15

### Participant 1

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**Problem Description: How does one make 'accommodations' when a mandatory presentation assignment is embedded in a course?**



S: How do you frame such a task?

J: Can we replicate a prototype with baby steps on 'how to' in order to package and educate students?

A: Do we need to first look at the situation which has prompted the necessity for the accommodation? In my experience the most common issues are either academic performance or personal unexpected emergencies. Can we set guidelines based on some broad assessment/categorizing of most common situations and then the baby steps concept.

## Participant 2

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**Problem Description: How to use changing technology without compromising standards, or merely as cost saving measure?**

B: How do we accommodate late registrants?

G: How are you able to replace richness of warm human interaction or experience?

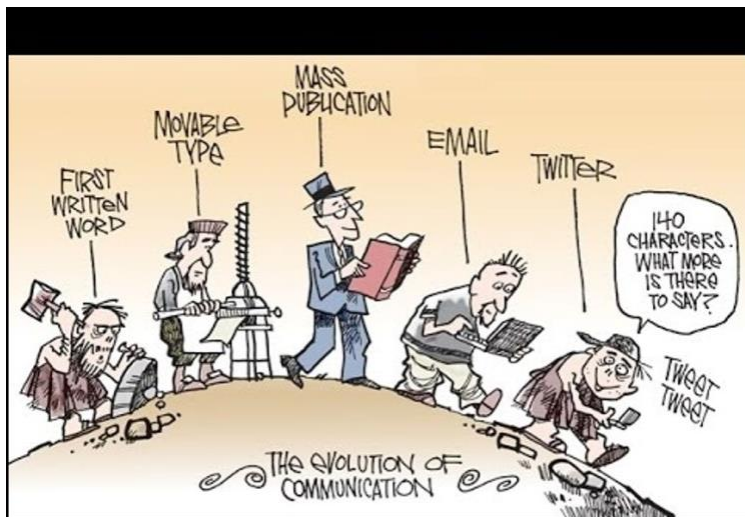
H: How do you / have you deal(t) with this?

K: Have you collected data or past info on this or considered a Student's Toastmaster's Club?

## Participant 3

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**Problem Description: I would like to restate 'Wicked Problem': "How to provide quality education while keeping up with continually changing technology - without compromising standards, or merely as a cost saving measure? Is it connecting or disconnecting us?"**



The Evolution of Modern Technology  
by WiseLifer, YOUTUBE

C: Would diversifying teaching techniques help find meaning/ value in course?

H: How do you convince them to reconsider student acceptance?

M: If we're motivating the wrong demographic, can we pre screen?

A: Other considerations from this problem have uncovered the personal element. The well being of faculty having to figure out how to deal with the stresses caused by unmotivated students. This is a sub-problem.

J: Starting a task force of experienced faculty has lead to breaking down a step by step approach that will hopefully lead to a support system helping faculty both inside and outside of the classroom.

## **Participant 4**

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### **Problem Description: How do we prepare ourselves more proactively than reactively?**

K: Have we estimated how many situations or processes operate in 'damage control' mode?

B: Is there a mechanism in place to support such issues: weather, \$\$, policy?

A: We seem to be operating in 'damage control mode' on an ongoing basis and the College seems to be accepting of it. To better prepare the students prior to arrival dont we need to assess the existing communication and messages being sent to students? Is it as simple as revamping the welcome package or student guidebook?

## **Participant 5**

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**Problem Description: With increase in international enrolment how do you teach with integrity?**

G: is this a systemic or local issue? why is this the white elephant no one will address?

D: Who is selling this to the international market?

## **Participant 6**

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**Problem Description: How do we break down economic barriers for students and create a standard messaging?**

S: Why would you like to break them down, why is it so important?

H: Can we create a reporting system that can flag issues (harsh weather, \$\$ need)?

D: Have we explored provincial funding v/s international education budget?

A: Why DO international students pay 3 times as much as domestic students?

# padlet

## Virtual Action Learning Set - DREAM

### Participant 1

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**Problem Description: What is our attitude and action towards classroom disruption and mental well being?**

Action Learning Set 'A' - DISCOVER

Mar 1-15

PADLET

### Participant 2

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**Problem Description: How do we support our students' mental health, while simultaneously developing resiliency and achieving learning outcomes?**

Action Learning Set 'A' - DISCOVER

Mar 1-15

PADLET

Reducing the number of courses for students who have mental issues works on theory, but in reality, it won't work, because it takes longer to finish the school, and it comes with higher cost.

### Participant 3

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**Problem Description: How do we deal with plagiarism? Is it linked to behavior?**

Action Learning Set 'A' - DISCOVER

Mar 1-15

Sadly, in some instances it is cultural

### Participant 4

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**Problem Description: How do we handle lack of consistency in what concerns student accommodation, behavior, engagement?**

Action Learning Set 'A' - DISCOVER

Mar 1-15

PADLET

Consistency in engagement is a challenge, since there is no 'one size fits all' approach to how each faculty member engages students. There are 'best practices' that can be shared in a collegial manner.

### Participant 5

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**Problem Description: "How to provide quality education while keeping up with continually changing technology - without compromising standards, or merely as a cost saving measure? Is it connecting or disconnecting us?"**

Action Learning Set 'B' - DISCOVER

Mar 1-15

PADLET

## Participant 6

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**Problem Description: With increase in international enrolment how do you teach with integrity?**

Action Learning Set 'B' - DISCOVER

Mar 1-15

PADLET

The challenge is determining how to manage classroom disruptions by those who aren't interested, testing strategies to minimize cheating and how to create evaluations that are more true to the learning outcomes

## Participant 7

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**Problem Description: How does one make 'accommodations' when a mandatory presentation assignment is embedded in a course?**

Action Learning Set 'B' - DISCOVER

Mar 1-15

PADLET

Eliminate all presentations from Semester 1. Students are experiencing enough culture shock, and in some instances it would be difficult for them to get out of their comfort zone.

## Participant 8

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**Problem Description: How do we break down economic barriers for students and create a standard messaging?**

Action Learning Set 'B' - DISCOVER

Mar 1-15

PADLET

### **Reframe of the Initial Question**

How do we create a bridge between the International Office, Faculties, International Representatives (Agencies) and our International Students to provide them with consistent messaging and resources pre and during their time with the college. Through this bridge, can we break down the barriers based on demographic, economic and cultural perceived obstacles that might limit students acclimating to school here and in turn their ultimate success potential? A key part of this analysis would be identify clearly who would be responsible for which part and understanding the exact role of each 'person/department/group' in developing/being accountable for their 'piece' of the bridge so that at the end there was a strong plan that could be continuously assessed, evaluated and amended for continuous growth.

## Participant 9

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**Problem Description: With increased online learning courses, how do we motivate the Millennial Generation to engage in learning that is prone to disruption?**

Action Learning Set 'B' - DISCOVER

Mar 1-15

PADLET



## Participant 10

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### **Problem Description: How do we prepare ourselves more proactively than reactively?**

Action Learning Set 'B' - DISCOVER

Mar 1-15

PADLET

Need to start with International department providing background info on what info re College is provided, who distributes it and how. Maybe some seminars outlining how and what is done in each of the various regions. This will give us some context of what students know/ don't know.

Are there stats from International department on demographics by region that we could use?

Getting the data would be 1st step. Then having it analysed and distributed in a meaningful and timely fashion. Step 3 decide on who are the stakeholders, what would be the responsibilities, who would have accountability etc Step 4 setting up team to discuss solutions/recommendations and eventually roll out a plan.

# padlet

## Virtual Action Learning Set

**DESIGN:** *Bridge between what is and what might be*

### Participant 1

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**Problem Description:** How do we support our students' mental health, while simultaneously developing resiliency and achieving learning outcomes?

#### Wishlist

Reducing the number of courses for students who have mental issues works on theory, but in reality, it won't work, because it takes longer to finish the school, and it comes with higher cost.

#### Action Plan

- Peer mentoring
- Learning Centre - readiness course
- Success strategies

### Participant 2

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**Problem Description:** How do we deal with plagiarism? Is it linked to behavior?

#### Wishlist

How about putting together a reference to plagiarism through examples so that students are "educated" as to what not to do. Granted there are many that know exactly what it is but do it anyway.

#### Action Plan

- Scholarship of Teaching and Learning, further research
- Focus Groups: student + faculty
- Environment scan

## Participant 3

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**Problem Description: How do we handle lack of consistency in what concerns student accommodation, behavior, engagement?**

### Wishlist

There are 'best practices' that can be shared in a collegial manner-task forces of faculty to gather best practices of others and put together a "guide" for collaborative use and sharing-not going to come from Management, so faculty need to take the reins on this

### Action Plan

- Call for task force
- Best practices sharing
- Tool kits

## Participant 4

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**Problem Description: How do we break down economic barriers for students and create a standard messaging?**

How do we create a bridge between the International Office Faculties, International Representatives (Agencies) and our International Students to provide them with consistent messaging and resources pre and during their time at the College. Through this bridge, can we break down the barriers based on demographic, economic and cultural perceived obstacles that might limit students acclimating to school here and in turn their ultimate success potential? A key part of this analysis would be identify clearly who would be responsible for which part and understanding the exact role of each 'person/department/group' in developing/being accountable for their 'piece' of the bridge so that at the end there was a strong plan that could be continuously assessed, evaluated and amended for continuous growth.

### Wishlist

1. Through the right, committed individuals/representatives/stakeholders – develop a plan that will truly have strong pillar/longevity to promote the messaging across the college regardless of the School/specialty.

2. A plan that aligns itself with the standards/policies and expectation of the college/suppliers and the students

3. The message where the plan is constantly assessed and evaluated by not only the faculty/administration but also through the students (Pre/During/Graduated)

The ability to break down barriers e.g. emotional, mental, International vs. Domestic (once they are on campus) and promote a space of global inclusivity and acceptance

### **Action Plan**

- Liaise with International Dept.
- Create conversational opportunities

### **Participant 5**

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**Problem Description: "How to provide quality education while keeping up with continually changing technology - without compromising standards, or merely as a cost saving measure? Is it connecting or disconnecting us?"**

### **Wishlist**

1. For classes that have been designated to fully on-line, do you think that in some topics that students might struggle with there could be "get together sessions" offered a couple of times in a semester for those who need personal interaction
2. If we are really moving to technology enhanced teaching/learning, the college has to upgrade infrastructure and support faculty in their use of technology

### **Action Plan**

- Explore Ed Tech alternatives
- Training and Mentoring
- Best practices

## Participant 6

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**Problem Description: How do we prepare ourselves more proactively than reactively?**

### Wishlist

1. Need to start with International department providing background info on what info re College is provided, who distributes it and how. Maybe some seminars outlining how and what is done in each of the various regions. This will give us some context of what students know/don't know
2. Are there stats from International department on demographics by region that we could use?

### Action Plan

- Getting the data would be 1st step. Then having it analysed, and distributed in a meaningful and timely fashion.
- Decide on who are the stakeholders, what would be the responsibilities, who would have accountability etc.
- Setting up team to discuss solutions/ recommendations and eventually roll out a plan

## Participant 7

---

**Problem Description: With increase in international enrolment how do you teach with integrity?**

### Wishlist

1. Determining how to manage classroom disruptions by those who aren't interested, testing strategies to minimize cheating and how to create evaluations that are more true to the learning outcomes
2. Integrity of the program that needs to be rescued: faculty are passionate and excited to share but students trying to change "agenda" time to *take back* the classroom!!

3. Coming together, literally as small task force groups to outline a plan - place to start. And the outcome would be a plan that everyone would use consistently across the board sending a clear message of respect on many levels

### **Action Plan**

-Form task forces of faculty members to address testing procedures and the attempts at cheating in conjunction with coming up with an outline for students with specific examples of what not to do. The second task force group would be to address how to stop/control classroom disruptions.

### **Participant 8**

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**Problem Description: What is our attitude and action towards classroom disruption and mental well being?**

#### **Wishlist**

Identify barriers  
Start a constructive conversation like this one  
Freedom of dialogue  
Clear messaging, support

### **Participant 9**

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**Problem Description: How does one make 'accommodations' when a mandatory presentation assignment is embedded in a course?**

#### **Wishlist**

Eliminate all presentations from Semester 1.

Students are experiencing enough culture shock, and in some instances it would be difficult for them to get out of their comfort zone.

#### **Action Plan**

-Check Model Route and pilot in Fall for feasibility  
-Solicit feedback  
-Data usefulness

Appendix H  
Coding of Field Observation & Journaling

***CODES used to draw out emerging themes, patterns and commonalities***

Phase I

THEMES	Notes & Quotes
Resources	<p>buy in not simple – unless long term commitment /support provided time, institutional backing critical Quotes: “<i>what type of preparation would be needed?</i>”</p> <p>Keeping time, allowing enough room for each participant to have their voice heard Quotes: ‘<i>...we could have gone on for hours</i>’</p>
Social Connections	<p>Common platform for connections, align conflicting schedules, collaborative spirit and camaraderie from knowing one another, avenue to discuss and brainstorm</p> <p>Prompts that are self-led, reconnecting in a structured way Quotes: “<i>Is this not considered part of our work lives?</i>”</p>
Emotions	<p>Safe haven without inhibitions or managerial presence, non-threatening and receptive environment, individual and group strengths and weaknesses, overcoming power differentials, therapeutic for participants, passion for teaching and learning, shared understanding, eagerness to accept and reciprocate energy / enthusiasm. Quotes: “<i>is anyone from management going to be present at this meeting?</i>”</p> <p>Separating observation from reflexive/ reflective notes, taking pride in work, varied temperaments, excitement and emotions regarding one’s work, sense of ownership, relieved to share with others. Curiosity, relief, open mindset Quotes: “<i>...best thing to have happened to me in the five years of being here, I achieved more in those two hours than all this time at the organization</i>”</p>
Knowledge Building	<p>Collaborative reflection, critical dialoguing and engagement, using insights to reapply differently in new situation, learning and sharing about student-centric issues and possibilities.</p>

	<p>Quotes: “how do I define issues and wicked problems?”, “what if there aren’t any visible issues, how should I coin the statement?”</p> <p>How to own a part of the ‘bigger’ problem / what part to own or control, good to listen to others, sharing professional highlights and personal strengths.</p> <p>Quotes:  <i>“This provided us with a sounding board”</i>  <i>“I respect this form of research being done; we need something like this”</i>  <i>“Shouldn’t we be doing this anyway, on an ongoing basis?”</i></p>
Emerging Projects	<p>Topics of mutual interests, willingness to experiment. Sharing of puzzles, not knowing if they can be solved or owned</p> <p>Quotes:  <i>“I was talking to someone else and already came up with an idea, creating a workable taskforce to overcome certain aspects of my wicked problem”</i>  <i>“I heard ‘xyz’ speak about something like my own issue, can I talk to them to collaborate?”</i></p>

Phase II

THEMES	Notes & Quotes
Resources	<p>Digital data and online interaction with comparison to in person – flexibility, shuffling, initiative, in different modalities. Time extension owing to end of term, department acknowledgement of ALS, management support and emails offered for project.</p> <p>Online barrier, time crunch: other success stories inspire to consider resources (lack of). Inability to connect in person (remain virtual)</p>
Social Connections	<p>Sporadic with eagerness of initial posts, virtual dialogue and active exchange for few. Shift in communication, listening more, reduced volume, in person v/s hybrid divide is clear to gauge from participation level, frequency or initiative. Appreciation for the structure and it’s benefits.</p> <p>Variety of skillsets, interests and passion. Refreshing, mentally stimulating.</p> <p>Quotes:  <i>“I am confident this can be a practical, intellectually stimulating, hands on exercise to advance board room discussion to on site action more fluidly.”</i></p>



<p>Emotions</p>	<p>Some still catching up. More observations about self, need expressed for a space for intelligent conversations, than between meetings. Discussion about damage when such a system is absent. Sense of freedom when working without managerial presence.</p> <p>Bonding over similarities and differences, shared connectedness and empathy</p> <p>Quotes:  <i>"I am willing to be a sound board, and partner in like-minded ventures."</i></p>
<p>Knowledge Building</p>	<p>Offline notes maintained by few, images, slide deck, links and other supporting material with posts. Questions about self, team work and organizations, benefits of learning together than in silos.</p> <p>Mutual benefits when organized, avenues for open critique and honest feedback. Learning from individual lens v/s participant during debrief. Learning to step back, pause and reflect deeper</p> <p>Quotes:  <i>"I found someone else's query had similar objectives as mine."</i></p>
<p>Emerging Projects</p>	<p>Mini task force by 1 participant (outside of ALS) to push ahead, workshop model chosen by another team.</p> <p>Original ideas being built on, helps others to persevere.</p> <p>Quotes:  <i>"I have gone places with the grain of an idea nurtured in the group's first session."</i></p>

## Appendix I

### Debrief and Post Survey

1. How do you think things went (think about Phase I and Phase II)?
2. What were your impressions of your own learning and movement since Phase I?
3. What were the things that you heard more than once (themes)?
4. What were the things that you found most interesting about yourself or in the group?
5. What were the things you found most surprising?
6. What additional questions does this bring up for you?
7. Were there particular power dynamics in the group that may have influenced responses?
8. Were there any 'aha!' moments?
9. Would you continue using an ALS to learn, share, innovate or synergize?
10. Other comments observations

#### ***CODES used to draw out emerging themes, patterns and commonalities***

##### **1. How do you think things went (think about Phase I and Phase II)?**

Today was very interesting, and very informative overall.

I have put very little time into the project.

Very good, everyone participated and encouraged others to feel comfortable.

Overall, very good. No regret and great opportunity to collaborate and reflect.

I liked the Questions that forced me to break down my wicked problem.

I was very pleased with how Phase I and II progressed. I felt that Phase I (in particular) provide me with a stimulating and therapeutic space to both unpack and examine pressing issues that I am often confronted with in my work with students.

I think it was a great concept and a lot of good can come out of these wicked problems.

It was a bit difficult to truly understand the expectations in the beginning but thank you for the guidance and hope the end result will help!

## 2. What were your impressions of your own learning and movement since Phase I?

Would love to move forward with the topic. I think the group's feedback was very helpful

By questioning I was able to move forward into possible solutions to things that I can control

I felt a growth and a level of enjoyment as I moved through the phases. I only wish that I had more time and access to focus on my wicked problem more myself (and with others).

I hope to keep digging through it and building a potential solution. I hope to get the right individuals buy in so that change can occur.

When I decided to participate in the Action Learning Process, I was not expecting to be drawn into such a close sense of community with the other participants.

As the participants presented their issues and wicked problems, I found myself feeling very invested in their problems and wanting to contribute solutions and ideas towards resolving some of these issues.

A chance to reflect and share with others

I should have participated more, my workload didn't allow for this

## 3. What were the things that you heard more than once (themes)?

How to manage the element of mental health – that is now becoming the norm

We are here for our students but we are all frustrated

Mental wellbeing of both students and faculty. Frustration with uninterested students

Need for accommodation for our students and the ongoing challenges for students and faculty

We all have the same goal - to do what is best for the student while maintaining a high level of integrity. I think the common themes were the Academic Honesty Concerns meshed with the changing demographics/Geographic's and the common challenges with/for students.

I found it a challenge due to being removed from the group (connecting virtually). There is a lot of passion and common goals so I hope to have the chance in the future to chat more in person.

I felt that many of the challenges that the various members of the ALS presented were all interconnected in some way and stemmed from one core issue. I believe that this core issue has to do with the commodification of higher education.

College's recruitment strategy has resulted in an influx of international students, many of whom are unable to succeed, academically, resulting in disengagement financial strain, etc. and faculty and staff "bearing the brunt" of these issues.

One theme I heard mentioned a couple of times is that Faculty feel pressured to provide accommodations that reduces the standard of the course/program, under the rationale of "student retention".

#### 4. What were the things that you found most interesting about yourself or in the group?

That the issues surrounding students and their learning was communicated in a manner that supports the same ideas I was thinking about and expressing

We are all on the same page

The same challenge with freedom of expression

That we're all in this together so talking and sharing is our only saving grace  
I was surprised by how difficult it was for me to engage in asking questions in order to clarify the nature of the problem. I found myself jumping straight into proposing solutions without asking clarifying questions.

#### 5. What were the things you found most surprising?

No surprises

That there were overlaps among the various problems the participants presented.

Nothing much, as we are colleagues that care about each other and the students

#### 6. What additional questions does this bring up for you?

What restrictions will there be where 'money' is concerned – compensating contract faculty  
What are the next steps

The points raised by the group (questions) are valid and I am in agreement. Perhaps as I go through the process more will be raised.

**7. Were there particular power dynamics in the group that may have influenced responses?**

No

None at all. I felt that this was very much a safe space, where all members not only respected others' opinions and views but encouraged differing perspectives.

The probing questions to stay on track

I felt that there were but don't feel that I can objectively comment as I was in the room

**8. Were there any 'a ha!' moments?**

Yes, when I realized that some plans to bring consistency may not be reasonable in action – only control what I can!

My "a ha" moment came during the final set meeting where each participant presented on their problem. This was a transformative moment because it moved the conversation to one that was primarily explorative to a more action-oriented focus.

**9. Would you continue using an ALS to learn, share, innovate or synergize?**

Yes

Definitely!

Yes

Absolutely

**10. Other comments**

Great group, feels so good to share!

Les continue the dialogue and educational journey

**TABULATED CODES: Emerging Themes**

<b>RESOURCES</b>	Time, Money, Workload, Access, Right buy in / support
<b>SOCIAL CONNECTIONS</b>	participation, comfort, therapeutic space, helpful group feedback, sense of community, invested in other's problems, all have the same goal, share with others, chat more in person, feeling removed (virtual), being interconnected, same ideas, same challenges, on the same page, all in this together, talking and sharing, colleagues that care, safe space, respecting others, diversified opinions, feels good to share, dialogue
<b>EMOTIONS</b>	frustration, understanding of expectations, control and lack of control, enjoyment, empathy, integrity, bearing the brunt, freedom of expression, difficulty in clarifying
<b>KNOWLEDGE BUILDING</b>	curiosity, informative, collaborate, break down wicked issues, stimulating, good coming out of wicked issues, moving forward, possible solutions, growth, digging through, contribution, ideas for resolving, reflect, all issues stemming from one core, overlaps in problems, valid points raised by group, probing questions to stay on track, some plans unreasonable for action, transformative, moving from exploration to action orientation focus, educational journey
<b>EMERGING PROJECTS</b>	academic integrity, student accommodation, faculty and student wellbeing and mental health, education commodification, next steps

