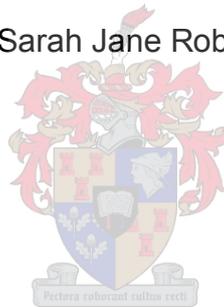


*The development of a transformative  
business-driven action learning  
framework*

By

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**Dissertation presented  
for the degree of  
Doctor of Philosophy in the Faculty of Business Management  
and Administration  
at Stellenbosch University**

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## **Declaration**

By submitting this dissertation electronically, I declare that the entirety of the work contained therein is my own original work, and that I am the sole author thereof, that that reproduction and publication thereof by Stellenbosch University will not infringe any third party rights and that I have not previously in its entirety or in part submitted it for obtaining any qualification.

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I would not have had the courage to embark on this journey if it were not for Dr Bell and Dr Riordan, who encouraged me to start the PhD journey.

*“Our chief want is someone who will inspire us to be what we know we could be” - Ralph Waldo Emerson.*

I would like to thank my supervisor and co-supervisor, Dr Le Sueur and Dr Terblanche for their guidance, patience and feedback.

*“Supervision is an opportunity to bring someone back to their own mind, to show them how good they can be” - Nancy Kline.*

I have parents who have always believed in my ability and have supported my decisions. Thank you, Mum and Dad, for giving me the best start in life and for your constant encouragement.

*“Children must be taught how to think, not what to think” – Margaret Mead.*

My husband, James, and children, Victoria and Jonathan for allowing me the space to achieve my dream and fly.

*“Hold fast to dreams, for if dreams die, life is a broken-winged bird that cannot fly” - Langston Hughes.*

To all the participants and action learning practitioners who have worked with me over the last 12 years:

*“Learning is not attained by chance, it must be sought for with ardour and attended to with diligence” - Abigail Adams.*

To the participants who shared their stories in this present study, action learning facilitators and peer reviewers:

*“I can no other answer make, but, thanks, and thanks” - William Shakespeare.*

## PROLOGUE

### Researcher's autobiography

Narrative inquiry "characteristically begins with the researcher's autobiographically oriented narrative associated with the research puzzle" (Clandinin & Connelly, 2000, p. 40), which is the reason for including this autobiography.

I am one of the lucky few who love their chosen career; I have always wanted to and have had a career in management development. I recently read an interview that Tara Westover (2018) gave on her book, *Educated*, where she said the following:

*My education made me into a different person. The ideal situation is that you really want to learn. I think it's very unlikely that anyone who engages with a wide variety of different perspectives will come away with the same worldview. I think education means access to different perspectives and understanding of different people and experiences and history. If all of that doesn't change your mind a bit, you're probably doing it wrong.*

These words resonated deeply with me, as I truly believe that management development changes one's worldview. Rose (2015) pointed out that if you do not have confidence that education has the ability to effect change, then you probably should not be in education

I have a passion for understanding more about learning, how participants learn and helping others learn. My job involves facilitation of learning, both in the classroom during management development programmes and in a Business-Driven Action Learning context as an action learning facilitator. In this present study I set out to explore how Business-Driven Action Learning (BDAL) contributes to individual transformative learning.

This PhD has been a learning journey where I have learnt about myself as a writer, researcher and action learning facilitator. I have thought about BDAL constantly and as Shope (2006, p.165) wrote:

*When you are preparing for a journey, you own the journey. Once you've started the journey, the journey owns you.*

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## **List of acronyms and abbreviations**

BDAL	Business-Driven Action Learning
LPF	Learning Process Facilitator
MDP	Management Development Programme
PhD	Doctor of Philosophy
SMDP	Senior Management Development Programme
TBDAL	Transformative Business-Driven Action Learning

## GLOSSARY OF TERMS

Action Learning	Action learning involves combining problem solving on a real existing business challenge (often called a ‘wicked’ problem) with learning about how to work together in a team, how to solve problems more effectively, and how to improve the learning process in general (Burke, 1995; O’Neil & Marsick, 2007; Pedler & Abbott, 2013).
Action learning coach	The action learning coach facilitates BDAL for the learning institution. The action learning coach has many other names and roles depending on the action learning approach taken. In this present study the term action learning facilitator, action learning practitioner and the action learning coach is interchangeable.
BDAL	Business-Driven Action Learning is one of the many varieties of action learning. BDAL is a philosophy and a process where work is integrated into “critical business challenges with individual, team, and organisational learning, at a speed faster than the rate for change, for implementing sustainable business solutions and development of leaders and their societies” (Boshyk, 2010, p. 77).
Management development institution	An organisation that provides training and development in the form of management development programmes to organisations.
Management Development Programme (MDP)	A training and development programme that is designed and customised specifically for a corporate/sponsoring organisation to meet the need of their business. These programmes are relatively short period meant to develop the capabilities of current or future managers and leaders (Hura, 2013). In this present study the management development programme is delivered by an external training resource called the management development institution.
Participants	For the purpose of this present study, the managers will be called <i>participants</i> , and the organisation will be called the <i>sponsoring organisation</i> . It is important to capture the individual’s experience and in this qualitative research the subjects or respondents are part time students, also called learners, who participate in a senior management development programme and

	are hence called participants. Merriam (2009, p.162) posits that the word “participant” infers inclusion and willingness to co-operate; which means that the participants volunteered to be part of this present study.
Programme	A set of workshops offered by a learning institution. In this present study the management development programme consists of the workshops that are part of the senior management development programme (SMDP) (Appendix 1).
Set	An action learning group that consists of about six participants who work on a business challenge. The term ‘team’ and ‘set’ is used interchangeably in the literature.
Sponsoring organisation	The client organisation which tasks the learning institution to design, plan and run a senior management development programme.
Transformative learning	Individual learning that requires an entire shift of view. Transformative learning has taken place when there is a considerable and permanent change in the way an individual experiences, conceptualises and interacts in the world (Hoggan, 2016).
Wicked problem	A term that originated with Grint (2008, pp. 11-18) Wicked problems are messy and do not require rational planning but rather, leadership and learning (Pedler & Abbott, 2013). The business challenge that the set works on in the form of a team project is described as a wicked problem.
Study schools	A number of workshops in a management development programme.
Faculty	External subject matter experts who facilitate workshops during a study school.

## **ABSTRACT**

This present study is located within the realm of Business-Driven Action Learning (BDAL) in a management development programme. BDAL, a philosophy and process, results in many types of learning. Individual learning is sometimes ignored as participants at times focus on the task of solving the business challenge to the detriment of their own learning. In terms of individual learning there exists the possibility for participants to experience a new way of thinking, known as transformative learning. The aim of this present study was to explore how (if at all) individual transformative learning could be embedded into a BDAL framework. The research question: How should a BDAL framework be designed to facilitate individual transformative learning during a management development programme, was addressed through a narrative inquiry approach using hand-drawn images and in-depth interviews grounded in a constructivist paradigm.

The research findings revealed antecedents to BDAL, processes during BDAL and individual transformative learning outcomes. Antecedents to BDAL included readiness of the participant to learn (willing, able and time to learn), supportive relationships and team conditions that support learning. Processes that needed to take place during BDAL included active reflection on self and others and the need for a sense of control. The individual transformative learning outcomes discovered were understanding multiple perspectives, and self-awareness and confidence.

The findings contribute to the BDAL component parts framework thereby supplementing the theory on BDAL to form a new conceptual framework called Transformative Business-Driven Action Learning (TBDAL). It is suggested that TBDAL be applied during the design and facilitation of management development programmes. In addition to this new conceptual framework, conceptual guidelines were recommended for the four key stakeholders (participant, sponsoring organisation, action learning facilitator and learning institution) as each stakeholder has the potential to contribute to TBDAL before, during and after the TBDAL process to promote potential for individual transformative learning. This present study makes a scholarly, practice and methodology contribution.

## **CHAPTER ONE: INTRODUCTION TO THE RESEARCH**

This chapter provides the background to this present study and why it is necessary for management development programmes to equip participants to manage in the changing landscape. The two main theories discussed are BDAL and individual transformative learning in the realm of management development programmes. The purpose of the research is explained and the problem statement clarified. The research aim and the research questions inform the research design. The importance of the research is summarised and the section concludes with an outline of the chapters.

### **1.1 BACKGROUND TO THE RESEARCH**

Literature informs us that managers, should they wish to prepare for the future, must be able to adapt to the demands of a changing work environment (O'Connor, Bronner & Delaney, 2002). Change has always been part of an organisations' history (Burns, 2009); however, it is the rate of change that is challenging for managers (Kotter, 2013). The shifting work environment requires managers to have certain proficiencies and abilities (Davies, Fidler & Gobis, 2011), which include the ability to lead teams, ask insightful questions, and solve complex problems by applying systems thinking (Northouse, 2015). The organisation's future depends on managers mastering complexity and applying the necessary skills in their environment (Davies, et al., 2011). Research by Deloitte University Press (2015) established that only six percent of organisations feel ready to address work challenges from a management and leadership perspective. Current management development programmes and corporate learning systems are not prepared to address the skills demand and the solution is to shift away from the organisation to the individual (Accenture, 2018).

All individuals who work in organisations need to learn, whether they intentionally decide to or not, as it is a key requirement for their sustained existence (Kim, 1993). Senge (2006) calls an organisation that is continually able to learn and adapt to the environment, a learning organisation. A learning organisation consists of people who increase their ability to get results, create space to nurture thinking and repeatedly learn (Senge, 2006). In summary, all

organisations, should they wish to survive due to the rate of change in the external environment, need managers and leaders who have the skills to embrace the paradigm of change. Boshyk (2010) believes that learning must be greater than and not just equal to change.

Ensuring that managers are equipped with the skills to manage in a constantly changing environment has implications for the design of management development programmes so that managers can function at the highest possible level rather than being stuck in the patterns of their previous experiences (Shelton & Darling, 2003). It can therefore be argued that it is necessary to provide management development programmes to equip managers with the necessary skills to deal with the changing landscape. Management development institutions, organisations that provide training and development to clients, are questioning how to develop management development programmes relevant to the changing organisational environment (Bourner, 2011a; Rolland, 2006; Svalgaard, 2017) and one of the approaches they use is an action learning programme informed by Business-Driven Action Learning (BDAL). BDAL is a philosophy and a process where teams work on a “critical business challenges with individual, team, and organisational learning” (Boshyk, 2010, p. 77). It is important to note that action learning takes on a variety of forms (Dilworth, 1998) with BDAL being only one of these forms. BDAL is employed by management development institutions to engage participants in exploring and resolving a critical business challenge, whilst enhancing their leadership development and self-awareness (Boshyk, 2014). As part of BDAL, participants work in a group (set) where they try to solve a critical business challenge. BDAL emerged in contrast to the typical management development approaches of case studies and lectures (Pedler, Burgoyne & Brook, 2005). However, it can be argued that the task of solving the business challenge becomes the main focus and individual transformative learning could be neglected as the participants are too busy working on the task of solving the business challenge (Svalgaard, 2016), which provides the need for this study.

## **1.2 MANAGEMENT DEVELOPMENT**

Management development refers to a process where managers learn and improve their capabilities (Mumford, 1997) and is seen as an important tool to enhance individual and team performance (Akuratiyagamage, 2007). Managers often enter a management development programme when their personal and professional challenges are “intrinsically entangled” (Han & Liang, 2015, p. 763). Revans (1991, p. 75) concluded “nobody learns merely by talk or discussion and for my argument talk, includes case studies, management games, discussion groups, seminars, role plays and all other forms of social interaction that fall short of taking operational responsibility for one’s real decisions in a real world.” Revans wrote this paper in 1991 but it still remains relevant today as a more holistic approach to management development is called for (Groves, Orbaek White, Panya & Stewart, 2018; Waddock & Lozano, 2013). The results from traditional management development programmes can be seen as slow and highly unsatisfactory (Marquardt, 2000). A concern is that management development programmes do not seem to be resulting in what was promised. McKinsey Consulting in their 2017 survey found that only 11 per cent of 500 global executives felt that their management development efforts achieved desired results (Feser, Nielsen & Rennie, 2017). Management development has been criticised for its lack of attempting to solve real complex organisational problems (Paton, Chia & Burt, 2014). The underperformance to achieve the desired results suggests that the way management development programmes are designed and implemented needs consideration.

## **1.3 ACTION LEARNING**

The education methodology applied to management development programmes have evolved significantly since their introduction in the early 20th century (Wuestewald, 2016). There is a variety of reasons why organisations apply action learning to their management development: the suggestion that action learning can help an organisation keep up with the changing environment (Boshyk, 2002) and to combine development and tangible outcomes (O’Neil & Marsick, 2007; Rimanoczy & Turner, 2008).

A problem-based learning approach, typified by small group collaboration on problems, is the most widely adopted approach in management (Wuestewald, 2016). Problem-based learning is embedded in experiential and social learning theory (Bandura, 1977). A type of problem solving is action learning, recognised as an effective means of delivering management development (Zuber-Skerritt, 2002; Kramer, 2008). Revans (1991), the father of action learning, does not define action learning but rather describes it as talking versus doing something about the problem. Action learning is so much more than a problem solving approach as it aims at encouraging participants to take responsibility for their own learning in their life and work (McGill & Brockbank, 2004). Action learning involves combining problem solving on a real existing business challenge (often called a 'wicked' problem) with learning about how to work together in a team, how to solve problems more effectively, and how to improve the learning process in general (Burke, 1995; O'Neil & Marsick, 2007; Pedler & Abbott, 2013). "To solve the problem of how to learn in our contemporary knowledge era, there is no better vehicle than the use of action learning" (Raelin & Trehan, 2015, p. 128).

There is a variety of contexts and learning objectives which make use of the action learning philosophy, for example: decision-making evaluation (Bryson & Mobolurin, 1997), adult education (Dilworth & Willis, 2003), leadership (Raelin & Raelin, 2006), social change (Morgan & Ramirez, 1984), creative decision-making and building confidence (Cusins, 1996). Action learning is applied by managers all over the world in a variety of industry sectors such as mining, government, banking, health, engineering and education (Burgess, 1999). In terms of management development Pedler and Abbott (2013) suggest that most management development programmes include some form of action learning. Learning institutions include action learning in their programmes with the aim of improving individual performance, promoting learning and enabling organisations to adapt better to the environment (Dilworth, 1998). In the context of this present study, action learning informed by Business-Driven Action Learning is applied to a management development programme.

Action learning involves "inquiry, reflection and action", all of which could lead to learning and change, hence the link to transformative learning (Ajoku, 2015, p.

4). Action learning is a socially transformative process where participants, through collaboration and reflection, experience individual and social transformation (Passfield, 1996). It is this individual transformation that this present study aims to understand.

#### **1.4 BUSINESS-DRIVEN ACTION LEARNING**

The notion of *action learning* was devised by Revans (1982) and has since proliferated into various types, with Business-Driven Action Learning (BDAL) being one of them. The choice of which action learning approach to take depends on the organisational goals, participant needs and resource availability (Bong, et al., 2014). BDAL was presented by Yury Boshyk (2015) at the Global Forum on Business-Driven Action Learning, Leadership and Organisational Development in Cambridge where he described BDAL as a philosophy and an approach that addresses business challenges. “Business-Driven Action Learning is a term used to describe a results-focused orientation to individual leadership development and organisational learning and change” (Boshyk, 2002, p. 30). BDAL focuses on individual learning, team learning and organisation learning (Ajoku, 2015; Boshyk, 2010; 2015; Marquardt & Waddill, 2004). BDAL is proposed as an equilibrium between the polarised types of action learning that encourages both solving a real business challenge (task) through a team (process) and includes individual participants working on their personal challenges (process) (Boshyk, 2011). BDAL is a different approach to other forms of action learning, as BDAL stresses the “action on a company’s business challenges” (Boshyk, 2010, p. 77).

Although many management development programmes apply a form of action learning, the achievement of learning outcomes is often not evaluated as the only type of evaluation includes the immediate feedback given by participants at the end of a programme (Jacobs, 2008). If the aim of BDAL is to ensure individual, team and organisational learning (Boshyk, 2010), then there is a need to further explore the outcomes at the end of the programme to determine the extent of the individual learning.

Individual learning is a process involving a change in a participant’s behaviour or knowledge as a result of experience, reflection, trial and error, imitation,

formal teaching, and might be conscious or tacit (Novarese, 2012). Individual learning takes place when participants develop individual capacities when working with their peers in dealing with complex organisational problems (Venner, 2011). The research articles mostly refer to team and organisational learning and to a lesser extent individual learning. Boshyk (2010) concludes that BDAL is a methodology that enables individual, team and organisational learning, however there is an opportunity to explore the gap in individual learning especially individual transformative learning in BDAL.

BDAL is part of the scientific school of action learning where learning takes place through asking questions and includes the learning formula of  $L$  (Learning) =  $P$  (Programme knowledge) +  $Q$  (Insight gained by questioning) (Revans, 1983, p. 11). Even though there is a variety of action learning types in the different schools, Pedler, et al. (2005) argue there is value in exploring thoughtful variations of action learning and modifying the action learning practice accordingly. The design of an action learning programme is seen as a vital factor (O'Neil & Marsick, 2007; Pedler & Abbott, 2013; Revans, 2011), but the design process itself has been neglected (Bong, et al., 2014). Despite the appeal of applying action learning to management development, human resource development has had difficulty in naming the components of action learning to implement in practice (Cho, 2013). Boonyuen, Charungkattikul and Ratana-Ubol (2016) who explored integrating transformative learning and action learning approaches to enhance ethical leadership, noted that it is difficult to encourage people to change unless there is a process of transformation.

BDAL allows participants to get authentic work done in the form of an action learning project (Carson, 2015) and improves organisational results (Ram & Trehan, 2009). In terms of team learning the participants work in small groups, called sets. The paradox in action learning is that very few teams have a rich blend of both learning and action necessary for 'balanced' learning, as action (task) seems to override learning (process) (Marquardt, Leonard, Freedman, & Hill, 2009; O'Neil & Marsick, 2007). Without fully understanding individual learning, the team and organisational learning cannot be understood, as individuals make up teams and organisations.

Authors such as Dillenbourg (2005) and Stahl, Koschmann and Suthers (2006), support that team learning acknowledges the importance of individual learning. Nevertheless, current research papers deal mainly with team learning with very little mention of individual learning (Yadin & Or-Bach, 2010).

It is the development of the individual participant and their individual learning that remains unexplored in the action learning literature (Cho & Egan, 2010). Individual learning is important as “you can’t change the system unless you also change yourself” (Revens, 1982, p. 13) and mostly participants attend a management development programme for personal rather than organisational reasons (Long, 2004).

A complaint levelled against the utilisation of action learning is that learning is often sacrificed as the participant focuses mainly on completing the task (Raelin & Raelin, 2006; Svalgaard, 2016). Contrary to Raelin and Raelin (2006) and Svalgaard (2016) Boshyk (2011) argues that there is too much emphasis on learning and not enough emphasis on action in certain types of action learning, hence the need for BDAL. The objective of a BDAL approach is to put the “action” back into action learning, making sure that learning is still emphasised (Boshyk, 2011). BDAL implies that individual transformative learning takes place, however there is a lack of literature to support this point. It is individual transformative learning that this present study explores. Without emphasising individual transformative learning, BDAL becomes just another team project that potentially defeats the purpose of including BDAL into a management development programme.

There are four key stakeholders in BDAL: participant, action learning coach/facilitator, learning institution and sponsoring organisation. Stakeholders in action learning need to examine how they go about designing an action learning experience (Dilworth & Wills, 1999). Sandager, Bragh and Svalgaard (2019) recommend further research on how to prepare and work with key BDAL stakeholders is needed, especially the components that are required to take place before (antecedents) BDAL commences.

## **1.5 TRANSFORMATIVE LEARNING**

Transformative learning emerged from the field of adult education when

participants change their perception and construction of meaning through a learning experience (Mezirow, 1978). Transformative learning is a form of individual learning where the purpose is to help an individual become a more independent thinker (Mezirow, 1997). In the context of a management development programme, transformative learning is frequently portrayed as a mode of change on the part of an individual (Balsiger, Forster, Mader, Nagel, Sironi, Wilhelm & Zimmermann, 2017).

One of the problems with transformative learning theory is that it is often used to represent any instance of learning (Hoggan, 2016). This present study has clear parameters around the learning phenomena of individual transformative learning and is defined as “processes that result in significant and irreversible changes in the way a person experiences, conceptualises and interacts with the world” (Hoggan, 2016, p. 71). ‘Irreversible’ means to not go back but continue to grow. Hoggan (2016, p. 72) writes that it “would be simplistic to conceive of learning in a binary fashion as either transformative or not transformative.” The outcomes that define transformative learning include: becoming more open, reflective, inclusive, and emotionally capable of change (Mezirow, 1990; 2000). Hoggan (2016) expands on outcomes in his research by identifying six key outcomes, which he calls the typology of transformative learning: worldview, self, epistemology, ontology, behaviour and capacity.

There is specific research of transformative learning in an educational setting (Cusack, 1990; Ludwig, 1994; Matusicky, 1982; Pierce, 1986). Matusicky (1982), Ludwig (1994), and Pierce (1986) identified that ideal learning conditions require safety, openness and trust, Matusicky (1982) concluded that the instructional method must be learner focused and Matusicky (1982), Ludwig (1994) and Pierce (1986) highlighted participant autonomy, participation, reflection, and collaboration.

Cranton (2006), King (1997) and Mezirow (2000) argue that education (which can include management development) has a distinct role in transforming participants by inspiring them to expand their minds, assessing their assumptions, finding new meanings, and broadening their worldviews; this is transformative learning. When there is a need to change, participants have a need to re-examine their assumptions, values and critical thinking, and hence

the concept of transformative learning surfaces (Sterling, 2010-2011). Transformative learning can help individual participants experience a new way of thinking which they can apply to a life change (Wuestewald, 2016). Transformative learning requires a need for transformation, which implies that old knowledge must be examined (Gravette, 2004). It is the individual participants themselves who are responsible for their own development and others can only help in the facilitation of the process (Rifkin, 2003). This has implications for management development programmes as transformative learning cannot be forced onto participants (Gravett, 2004).

Transformative learning in a management development setting requires participants to reflect on their beliefs, assess their validity and examine the underlying structure, and this process is so incremental that participants are often unaware that transformative learning has taken place (Casebeer & Mann, 2017). The argument is that there is an understanding that participants who attend a management development programme require transformative learning, not only “confirmative” and “reformative” learning (Sterling & Thomas, 2006). With the argument that there is a need to promote learning for change, it can be concluded that one of the aims of management development is to create a “deep structural shift in the basic premises of thought, feelings and actions” - this can be called transformative learning (O’Sullivan, Morrell & O’Connor, 2002, p. 18). In terms of management development, it is no longer sufficient to educate managers on pure knowledge, as participants who are invested in a management development programme expect to change how they view the world (McCauley, Moxley & Van Velsor, 2003). A concern in the literature is that transformative learning is often not built into the design of a programme and it is seen as a by-product instead of a main aim in education (Taylor & Laros, 2014).

Cheng and Ho (2001) researched transfer of learning in management development programmes, but Ciporen (2010) suggested that research should instead focus on what outcomes (if any) result from management development. In Ciporen’s (2010) research the findings confirmed that participants who experienced individual transformative learning did engender individual, interpersonal, and organisational outcomes. This present study explores individual transformative learning outcomes from a management development

programme in more detail.

There is an opportunity to explore individual transformative learning in BDAL to understand the extent of individual transformative learning outcomes and to provide a conceptual framework that incorporates transformative learning into BDAL. A transformative element could create a beginning for insightful changes thereby improving the learning in action learning (Ajoku, 2015). In the drive for constant improvement and providing relevant management development, it is important to review BDAL and transformative learning approaches taken in management development programmes.

In conclusion, this present study includes two conceptual theories: BDAL and transformative learning both in a management development programme. Taylor (1997) and Clark and Wilson (1991) argued that the context of transformative learning could be better understood. This present study addresses this point as there is limited research on individual transformative learning regarding BDAL in the management development realm, hence the aim of this present study was to explore how (if at all) individual transformative learning could be embedded into a BDAL framework.

## **1.6 PURPOSE OF THE RESEARCH**

BDAL claims to develop the individual participant, the team and the organisation (Boshyk, 2015). Participants often find it upsetting that they cannot easily name or describe what their individual learning looks like (Marsick & O'Neil, 1999). The purpose of this present study is to articulate the invisible, as well as the visible learning from an individual participant's perspective as individual transformative learning can be so incremental that participants are not always aware that transformative learning has taken place (Casebeer & Mann, 2017). Bong and Cho (2017) researched the typology of success factors from action learning and summarised these into individual and organisational aspects as well as invisible and visible factors. As can be seen from Figure 1.1, the invisible factors are: individual learning, change in attitude, and reflection. The visible success factors are: change in behaviour and leadership.

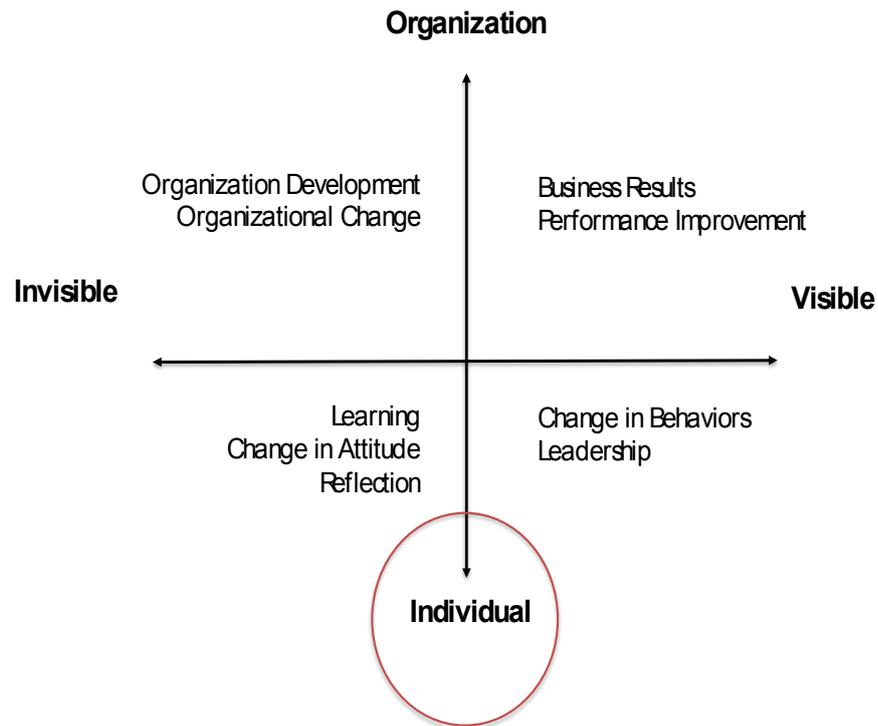


Figure 1.1 Typology of success in action learning (Bong & Cho, 2017, p. 171).

During BDAL, given that individuals are often so focused on the task of completing the BDAL they often ignore the process of learning (Svalgaard, 2017). As the focus of research affects practice and further research, it is argued that additional emphasis should be given to research regarding individual learning (Yadin & Or-Bach, 2010) to advance practice.

### 1.6.1 Problem statement

BDAL is a philosophy and process applied in management development programmes that claims to integrate the business challenge with individual, team and organisational learning. However, in reality, the BDAL business challenge becomes the main focus and the participants become task focused, thus resulting in little attention being given to their individual learning. Little is known about individual learning that takes place during BDAL. This individual learning can be visible and invisible, which makes it difficult for the participant to articulate. During BDAL there is the potential for a deep structural shift in the participant's thoughts, feelings and actions – known as transformative learning. Transformative learning enables the participant to be self-aware and apply skills

of critical thinking and analysis necessary for the changing world of work. In response to this, the research proposes to explore if BDAL can be designed so that it is a nurturing space to promote individual transformative learning. Transformative learning is desirable as many participants attend a management development programme for personal development.

### **1.6.2 Research aim**

The aim of this present study was to explore how (if at all) individual transformative learning could be embedded into a BDAL framework. Once it had been established to what extent individual transformative learning had taken place, the preconditions, processes and outcomes of transformative learning during BDAL were explored. The BDAL framework is relevant to the four key stakeholders: the sponsoring organisation, the learning institution, the participant and the action learning facilitator. This present study makes a scholarly contribution to BDAL that includes transformative learning so that BDAL theory is supplemented.

### **1.6.3 Research question**

The aim of this present study was to explore how (if at all) individual transformative learning could be embedded into a BDAL framework. The following research question guided this present study:

How should a BDAL framework be designed to facilitate individual transformative learning during a management development programme?

Research sub-questions:

To highlight the outlined problem and answer the main research question, the following sub-questions were addressed:

1. To what extent did participants experience individual transformative learning during BDAL?
2. What are the preconditions that create an environment for transformative learning during BDAL?
3. What outcomes resulted from the BDAL experience?

4. What conceptual guidelines can be recommended for the four key stakeholders: the sponsoring organisation, the learning institution, the participant and the action learning facilitator to aid individual transformative learning in BDAL?

These research questions correspond to the research aim, and together they guide this present study.

## **1.7 RESEARCH DESIGN**

This present study addressed the overarching research question, the sub-questions and proposes a novel conceptual framework that includes the relationship between transformative learning and BDAL to be applied to management development programme design.

The research design includes the research philosophy and paradigm and together these inform the research methodology. Denzin and Lincoln (2011, p. 14) confirm that the research design places “researchers in the empirical world and connects them to specific sites, people, groups, institutions, and bodies of relevant interpretive material.” A good qualitative research design defines the purpose of the research, creates a link between the research questions and the proposed methods and generates valid data (Ritchie & Lewis, 2003).

### **1.7.1 Research philosophy**

Due to the nature of this present study the epistemology of social constructivism, which is the belief that reality is socially constructed (Creswell, 2003), is suited to this present study. The reason for conducting the research in a social constructivist philosophy is to understand and describe human nature (Chilisa, 2011) and this present study is about understanding the BDAL experience, which is socially constructed. The philosophical underpinnings of constructivism can be traced back to Husserl’s philosophy of phenomenology (research of human consciousness and awareness) and Dilthey’s philosophy of hermeneutics (research of interpretation) (Chilisa, 2011; Neuman, 1997). Henning, Van Rensburg and Smit (2004, p. 20) suggested “the goal of science is to hold steadfastly to the goal of getting it right about reality or multiple realities, even if we can never achieve that goal.” A positivistic philosophy employing quantitative methods would not have been able to satisfy the

objective of the research, as deep understanding of the experience is necessary to gain knowledge (Henning et al., 2004).

The ontology underpinning this present study is subjective and can be explained as assumptions that we make about the nature of reality (Easterby-Smith, Thorpe & Lowe, 2004). The chosen ontology is a relativist perspective as there are many realities and no one objective truth (Ritchie & Lewis, 2008). Within a BDAL project context each participant has their own unique experience. In this present study, the researcher together with participants drew conclusions from the interpretation of the BDAL experience.

### **1.7.2 Research methodology**

In this present study, the assumption of multiple realities informs the research methodology. In this qualitative research a narrative inquiry is an ideal approach as it honours the lived experience as a source of important knowledge and understanding (Clandinin & Rosiek, 2007; Clandinin, 2007). A narrative inquiry studies an individual's experience in the world and seeks ways of inspiring and transforming that experience for themselves and others (Clandinin & Rosiek, 2007). Narrative inquiry in qualitative research occurs in the tension between the story that is lived and the story that is told (Geelan, 2003). This tension is what makes narrative inquiry both stimulating and challenging.

Narrative inquiry explores specific experiences (Grbich, 2007) and is a way to understand and make sense of the occurrences (Connelly & Clandinin, 1990). A narrative inquiry approach concentrates on stories told by participants, which reveal their experiences, interpretation and priorities (Clandinin, 2006). Narrative inquiry focuses on "how and why a particular event is storied" with the details and context coming to the fore (Riessman, 2008, pp. 12-13). Narrative inquiry prompts the reader to grow and think beyond the transcript (Riessman, 2008) and consequently, both the researcher and the participant grow and transform through the process (Clandinin & Connelly, 2000).

The researcher chose narratives to understand the participant's experience stories as it reveals truths about human experience (Reissman, 2008), which aligns to the research design and purpose of the research. Narrative inquirers consider experience as "Deweyan" (Dewey was a philosopher and educator

who founded pragmatism) in origin (Clandinin, 2006), which meets two aspects of experience: 'interaction' and 'continuity'. Interaction involves understanding the participants as individuals but within their social context of the BDAL experience. Continuity takes places as each point in a participant's life has an experiential base, which leads to an experiential future (Clandinin, 2006). Human experience, as a phenomenon, is fused together with narrative inquiry (Clandinin, 2006) and the researcher has the opportunity of "walking onto the mist of stories" (Clandinin, 2006, p. 47). Bruner (2003) advocates that through narrative inquiry, yesterday and tomorrow are reinvented through memory and imagination. This implies that the past, present and future are an important consideration for this present study.

Narrative inquiry has been the focus of a number of fields, including education (Clark, 2010; Pfahl & Wiessner, 2007) and a postgraduate executive action learning programme (Ruane, 2018). Narrative inquiry shares common elements with other forms of qualitative inquiry such as the social aspect of ethnography and the use of stories in phenomenology (Connelly & Clandinin, 2006). Ethnography and phenomenology were not chosen as the researcher is interested in the chain of experiences, not in the experience per se, but the manner in which people make sense of their experience. The focus of this present study supports qualitative research as the attention is on how and what, with details and context being important (Riessman, 2008). In conclusion, narrative inquiry was chosen as it meets the epistemological position of this present study of socially constructed realities. In consideration, this makes narrative inquiry an appropriate approach for this present study as it is a way of finding out if there is data, which is life changing for the participants. Narrative inquiry is, therefore, an ideal choice for research on individual transformative learning and BDAL as it allows for deep understanding of the participant's experience.

Narrative inquiry requires an active role of the researcher in creating stories (Reissman, 2008) and in this present study the researcher and the first peer reviewer constructed interpretive stories using McCormack's (2000a) lenses of process, language, moments and context. These lenses were essential in moving from the transcript to the interpretive stories as they provided a

framework to analyse the transcripts. The relationship between researcher and participants, over time, in a social setting is important in narrative inquiry (Clandinin & Connelly, 2000) as the narratives are co-created between the two parties and especially so in an interpretive story. This means that it is important for the researcher to maintain respect, mutuality and openness to multiple voices (Clandinin, 2006). In addition the participants were involved in member-checking of their final interpretive stories.

After the interpretive stories were written they required interpretation and this was where thematic analysis (Braun & Clarke, 2006) was applied. Thematic analysis was aided by thematic networks (Attride-Sterling, 2001). Thematic networks use the ensuing terminology: basic themes, organising themes and global themes (Attride-Sterling, 2001). Narrative is both a phenomenon and a pattern of inquiry (Clandinin, 2006) and this present study aimed to see if there was the potential to broaden methodological approaches in narrative inquiry, as suggested by Glover (2004). Overall there were five phases of data gathering, using different samples and different management programmes all of which gave depth to this present study.

### **1.8 IMPORTANCE OF THIS PRESENT STUDY**

This present study is important to all four stakeholders: the sponsoring organisation, the learning institution, the action learning facilitator and the participant. It is important to the sponsoring organisation as a concern is that management development programmes are not keeping up with the rapidly changing business landscape which results in the sponsoring organisation not seeing the results (Bulterman-Bos, 2008; Feser, Nelsen & Rennie, 2017). This present study is also important to learning institutions as how to design learning in a management development programme is deliberated (Svalgaard, 2017). The challenge is how to organise learning to bridge the gap between gaining knowledge and translating that knowledge into action (Ibarra, Snook & Guillén Ramo, 2010). The present study is also important to the action learning facilitator who guides the implementation of the BDAL process in the management development programme. There is still limited empirical research to support design and implementation of management development programmes (Scot, 2017).

An advance in management development programmes is the introduction of action learning as it focuses on solving real life problems thereby bridging the gap between knowledge and action (Kets de Vries & Korotov, 2007). Action learning is applied to management development programmes to bridge the gap between theory and practice (Marquardt & Waddell, 2004). There are different varieties of action learning with BDAL being one. BDAL was created as it was felt that the focus needed to be more on the business challenge (Bosky, 2011). However as BDAL also includes both business challenges and personal challenges it is seen to develop the individual, team and the organisation (Boshyk, 2015). It is this individual learning that requires additional insight, as the literature is not clear what this individual learning entails. Individual learning can be described as invisible (Bong & Cho, 2017) so it is difficult to articulate.

This present study is also important to participants who work on BDAL projects during a management development programme as the participants often attend a management development programme to make a change in their behaviour that allows them to be more effective in their work and life (Kets de Vries & Korotov, 2007). There is an abundance of literature relating to action learning and transformative learning; however, there is a lack of understanding regarding individual transformative learning in BDAL in management development programmes. This present study answers the call from Pedler, Burgoyne & Brook (2005) who suggest that there is value in exploring thoughtful variations of action learning and modifying the action learning practice accordingly. Kets and Korotov (2007) suggest that further research is needed in making management development programmes useful for change in both individuals and organisations. Ajoku (2015) suggests that there is scope to explore the boundaries between action learning and transformative learning.

In conclusion, many types of learning are possible from BDAL but individual transformative learning (with its nature of permanent and irreversibility) is implied however further research is necessary to supplement the theory of BDAL.

## **1.9 OUTLINE OF CHAPTERS**

The chapter division are as follows:

## CHAPTER ONE: INTRODUCTION

This chapter introduces the reader to the context by providing the background to be investigated and the two main conceptual frameworks: Business-Driven action learning as a type of action learning and individual transformative learning. Thereafter, the need for the research was established which informed the problem statement, research aim and research question. The research design includes the research philosophy and methodology.

## CHAPTER TWO: LITERATURE REVIEW

This chapter analyses and discusses existing concepts, theories and frameworks on learning, action learning, BDAL and transformative learning. This chapter summarises the contributions leading authors have made to the subject matter and informs the new conceptual framework for the researcher's own work as it identifies gaps in the current body of knowledge.

## CHAPTER THREE: RESEARCH METHODOLOGY

For this present study a qualitative narrative inquiry was chosen. The chapter outlines the five phases of the research, and each phase is linked to the sample, data gathering and analysis.

Phase One and Two were pilot Phases. Phase Three is the main Phase of data gathering and analysis and includes the research methods of 'draw, write, tell and write', which includes hand-drawn images and in-depth interviews. Analysis of Phase Three data informs the reader on the move from transcript to interpretive stories using McCormack's (2000a; 200b) lenses. Thematic analysis, thematic maps and thematic networks are applied to the interpretive stories to produce basic, organising and global themes. Phases Four and Five add additional views to the research consequently adding to crystallisation. The chapter concludes with a section on quality assurance.

## CHAPTER FOUR: INTERPRETATION AND DISCUSSION OF THE DATA GATHERED FROM THE INTERVIEW TRANSCRIPTS PHASE THREE

This chapter explores how the researcher moved from the transcripts, including the hand-drawn images, to the writing of the interpretive stories using McCormack's (2000a; 2000b) lenses. This chapter substantiates the rigour in

the research and includes feedback and reflection from the participants on the method of hand-drawn images and member-checking on the actual interpretive story itself. The chapter concludes with a section on transformative learning applying Hoggan's (2016) criteria of breadth, depth and relative stability to the outcomes of learning.

## CHAPTER FIVE: INTERPRETATION AND DISCUSSION OF THE DATA GATHERED

The collective findings from the interpretive stories from Phase Three are summarised in this chapter and a discussion is built around the global themes and organising themes that emerged to provide meaning to the data. These themes and findings were summarised in a systematic map that forms the foundation of the new conceptual framework. Participants compare their BDAL experience to the interpretive stories they read in Phase Four. Lastly, feedback from the action learning facilitators from Phase Five on the new conceptual framework and feedback from participants on the application of interpretive stories as a learning tool is included.

## CHAPTER SIX: SUMMARY AND CONCLUSIONS: NEW CONCEPTUAL FRAMEWORK AND CONCEPTUAL GUIDELINES

A new novel conceptual framework, TBDAL, and conceptual guidelines are offered in this chapter with respect to actions that can be taken for the design and implementation of Transformative Business-Driven Action Learning. The framework and conceptual guidelines benefit the four key stakeholders: the sponsoring organisation, the learning institution, the participant and the action learning facilitator. The contribution of this present study is discussed and the limitations and recommendations for further research are included.

### **1.10 SUMMARY**

Chapter One, the introductory chapter, provided the background and context to why this present study was necessary. The relevant key concepts, theories and frameworks were introduced and formed the foundation for the research. The need for the research was established, and this informed the main research question and sub-questions. The chapter provided a roadmap for the research undertaken in subsequent chapters.

## **CHAPTER TWO: LITERATURE REVIEW**

### **2.1 INTRODUCTION**

This chapter reviews and analyses the contributions others have made to the theoretical discussion of learning, management development, action learning, BDAL and individual transformative learning with the aim of identifying gaps in the current body of knowledge (Bloomberg & Volpe, 2008).

The chapter commences with an overview of learning, with specific reference to learning in a management development programme context. It then narrows down the learning into two types of conceptual frameworks, namely: action learning and transformative learning. Action learning is further explored, with specific reference to Boshyk's (2010) business-driven action learning (BDAL) framework. Transformative learning is explored using Mezirow's (2000) and Hoggan's (2016) transformative learning framework. Critical success factors of each type of learning are identified and examined. The chapter concludes with the connection between BDAL and transformative learning within a management development context. The conceptual diagram in Figure 2.1 is a visual representation of the literature from this chapter that guides the reader through the literature review. The conceptual diagram combines the definition of action learning and transformative learning to derive and summarise the research gap.

## Learning in a management development context

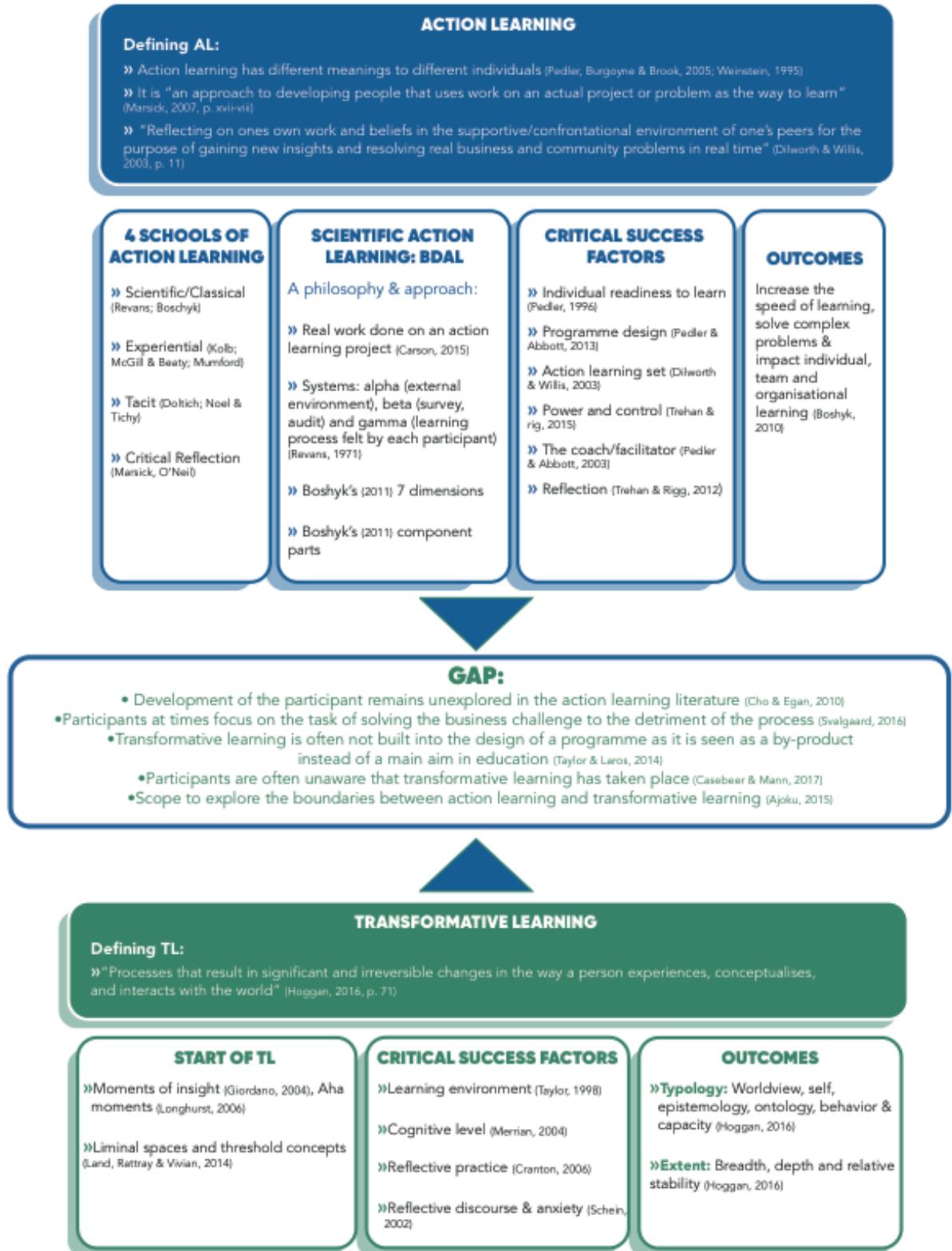


Figure 2.1 Conceptual framework for the literature review

## **2.2 DEFINING LEARNING**

There is little consensus by scholars as to what learning entails and how it occurs (Fiol & Lyles, 1985). However, a prominent view is that learning has transpired when new knowledge is interpreted into different behaviour that is replicable (Argus & Schön, 1978). Sofo, Yeo and Villafane (2010) and Atkins, Baker, Cole, George, Haywood, Thorpe, Tomlinson and Whitaker (2002) support this view as they claim that learning is a deliberate awareness that connects the mind to action. Hence, learning is about making sense of an experience and then using the interpretation of this experience by taking action (Mezirow, 1990).

The concept of learning as a cyclical process and not a singular event was suggested in the 1990s (Stonehouse & Pemberton, 1999) and still applies (Fry, Ketteridge & Marshall, 2015; Garvin, 2000). The notion of learning as a process has its origins in the work of the educational philosopher John Dewey (1938), who described learning as a process of design, action, reflection and adapting actions all of which are relevant in this context of management development. However, lack of agreement on what precisely learning involves is as a result of the diverse contexts in which learning takes place. In this present study it is important to define what is meant by learning in a management development context.

### **2.2.1 Learning in a management development context**

The function of managing people and organisations is a complex task (Megheirkouni, 2016c), especially in a hostile environment often referred to as a VUCA world; Volatile, Uncertain, Complex and Ambiguous (Johnson, 2009). Management development is consequently seen as an appropriate response which aims to support managers in their function. The aim of management development is to aid individual managers and the intellectual capital of the organisation (Cullen & Turnbull, 2005). However the value of management development programmes is still being questioned (Edmonstone, Lawless & Pedler, 2019).

Management development is a broad topic that emerged from a range of disciplines (such as psychology, social science and management studies)

(Cullen & Turnbull, 2005) and can be defined as a “mixture of experience, training and education, usually initiated by the organisation with the necessary co-operation of the individual” (Handy, Gordon, Gow & Randlesome, 1988, p. 12). Cullen and Turnbull (2005) conclude that very few definitions of management development include the concept of *learning*, which has implications for the way that management development programmes are understood and designed as it is implied that management development can *be done* to managers. In the understanding of management development programmes it would be valuable to remember Burgoyne’s (1998) definition of the role of managers, which is to create and maintain *meaning* in the organisational context.

Management development activities are usually delivered by an external professional on behalf of the organisation (Lees, 1992); this present study calls the external professional organisation the *learning institution*. Management development is however specific to each sponsoring organisation who has different needs in terms of their strategy and context. Management development has become context-specific in terms of its purpose, content and implementation (Megheirkouni, 2016a; 2016b), and each sponsoring organisation has their own rationales for investing in management development programmes (Cullen & Turnbull, 2005).

Management development is about developing individual talent and adding value to the organisation (Conger & Xin, 2000). The reasons why sponsoring organisations spend significant sums of money on management development programmes has been explored in literature (Long, 2004). Participants attend a management development programme to cope with personal challenges with an aim of pursuing their personal agendas and development (Han & Liang, 2015; Kets de Vries & Korotov, 2007), which means that the learning institution needs to create an integrated learning experience (Colby, Ehrlich, Sullivan & Dolle, 2011).

It is greatly debated how learning should be organised in a management development context (Svalgaard, 2017). There is a variety of learning approaches, methods and philosophies that are implemented in management development programmes (Burke & Collins, 2005). The most common

management development processes are mentoring, coaching, formal career related discussions by management and formal training programmes (Cao & Hamori, 2016). Couch and Citrin (2018) suggest that an effective management development programme includes the 70-20-10 ratio: navigating challenging assignments (70 per cent), developmental support, coaching, mentoring or role modelling from others (20 per cent) and self-study (10 per cent). If only lecturing and teacher-centred instruction is applied to management development programmes then participants can fail to implement teamwork, leadership and problem solving which is necessary in the 21<sup>st</sup> century (Roglio & Light, 2009). The struggle in designing management development programmes is how to organise learning to bridge the gap between gaining knowledge and translating that into action (Ibarra, Snook & Guillén Ramo, 2010). To meet the need of bringing action into management development sponsoring organisations are shifting their management development programmes to include work-based development initiatives (O'Leonard & Loew, 2012). Action learning is one of the approaches that is being applied to address the challenge to bridge the gap between learning and action (Marquardt & Waddell, 2004); it is seen as a vital approach in many management development programmes (Amogoh, 2009).

At the initiation of a management development programme, the needs of the organisation are considered and then selection of appropriate participants takes place. Selection of participants is often based on the priority of the person's role in the sponsoring organisation (Megheirkouni, 2018). It is not advisable to design a generic approach to management development, however a systems approach of inputs, process and outputs can be applied to many contexts (Megheirkouni, 2018). A system is a process that is broader than the management development programme or the content of a programme as it includes the organisation that contributes to producing effective managers (McCauley, Kanaga & Lafferty, 2010). Despite the fact that management development has grown in popularity there is little empirical research to support design and implementation of management development programmes (Scott, 2017).

### **2.2.2 Adult learning in management development**

The participants who attend management development programmes are adult

learners, making it important to understand adult learning principles in management development. Adult learning concentrates on helping participants learn by giving them the choice to decide what they need and want to learn, and how they learn (Knowles, 1984). An adult learning approach assumes that participants grow in capacity and need to be self-directed (Burnard, 1989; Jarvis, 1986). Adult learning can be developmental and/or transformative. Developmental learning is about human effectiveness whereas transformative learning emphasises self-understanding and a new consciousness (Hudson, 1999).

Design of management development programme needs careful consideration as there are key assumptions regarding adult learners that need to be considered. Adult learners have a need to know and hold prior learning experience, and this requires both readiness to learn and motivation to learn (Knowles, 1984; Swanson & Holton, 2005). The theory of adult learning was devised by Knowles (1990, p. 57-63) and is based on six assumptions, including:

1. The need to know – Adults need to know why they need to learn something before undertaking to learn it;
2. The learner’s self-concept – Adults have a self-concept of being responsible for their own decisions, for their own lives. Once they have arrived at that self-concept, they develop a deep psychological need to be seen by others and treated by others as being capable of self-direction;
3. The role of the learner’s experience – Adults come into educational activity with both a greater volume and a different quality of experience from youth;
4. Readiness to learn – Adults become ready to learn those things they need to know and are able to do in order to cope effectively with their real-life situation. “In order to learn, whether leaders or not, persons must wish to learn, for they learn only of their own volition, and not at the will of others” (Baquer & Revans, 1973, p. 15). However, no matter how effective the management development design is, if the “wish to learn” is not present the learning cannot progress (O’Neil & Marsick, 2007, p. xxi);
5. Orientation to learning – In contrast to children’s and youths’ subject-centered orientation to learning, adults are life-centred (or task centered or problem-centered) in their orientation to learning; and
6. Motivation – While adults are responsive to some external motivators, the most potent motivators are internal pressures.

Keeping these adult learning assumptions in mind, learning must be agile,

immediate, continuous and accessible. Learning must be linked back to how people work and live, and in order to engage individual participants (Craig & Kohl, 2014). Adults are motivated to learn if they perceive that it will help them deal with problems in a real-life situation (Knowles, 1990). Therefore, it is important to create an environment that stimulates a passion for learning (Craig & Kohl, 2014). In summary, the learning approach chosen to apply to management development programmes should meet adult learning principles so that the needs of the participant are met. Action learning incorporates adult learning principles as it is participant focused in solving “work-cum-learning problems” in an environment of trust and authenticity (Dean, 1998, p. 3).

### **2.3 ACTION LEARNING**

The first theory in this present study is action learning. Revans (1991, pp. 73-74) sees action learning as “diffusing the bands between theory and practice, knowledge and experience and, in the simplest terms between doing something on the one hand and talking about doing it on the other.” Action learning is one of the learning methods, philosophies and processes applied to management development programmes. The reason for applying an action learning philosophy to management development programmes is that the problems addressed are personal and/or organisational problems, it is not about discussing theory. As the problems in action learning are real problems not theoretical, managers develop the necessary experience to carry out their roles in the workplace (Marquardt, 2000). For managers to be successful in the changing work environment they need to function in the following roles, namely: as a systems thinker, change agent, innovator, servant, co-ordinator, teacher-mentor and visionary, all of which are part of action learning (Marquardt, 2000).

Action learning was developed by Revans while working with the National Coal Board in the United Kingdom after the nationalisation of the coal pits (Kozubaska & MacKenzie, 2012). He publicly introduced the term ‘Action Learning’ in 1972 (Boshyk, 2015). Revans deliberately avoided prescribing a definition for action learning (Boshyk, 2010), but defined what it is not (a case study or a task force) (Revans, 2011). Action learning is emotional, intellectual and physical

development that requires the participants to solve a real, complex and stressful problem to improve proposed change (Revans, 1982). Revans (2011, p.17) saw action learning as “the study of real life problems or opportunities by real managers in real time.” However, the world has changed significantly since Revans’ introduction of action learning and so has action learning developed to include many variations.

Since the inception of action learning, a number of authors have developed approaches that make action learning successful (Boshyk, 2010; Dilworth, 1998; Dotlich & Noel, 1998; Marquardt, 2010; Mumford, 1996; Vince, 2004; Weinstein, 1995). It is important to note that action learning is a problem solving approach to real business problems but it is much more than that, as it differs to problem solving in structure, intention and results (Mumford, 1995). Dilworth and Willis (2003, p. 11) describe action learning as “reflecting on one’s own work and beliefs in the supportive/confrontational environment of one’s peers for the purpose of gaining new insights and resolving real business and community problems in real time.” For this present study, O’Neil and Marsick’s (2007, pp. xvii-viii) definition of action learning is utilised as it is appropriate to learning in a management development context: they see action learning as “an approach to developing people that use work on an actual project or problem as the way to learn.” The main focus of all action learning streams of thought is around knowledge and the reflective process (Waddill, Banks & Marsh, 2010). There are a variety of action learning approaches from ‘business-driven’ (Boshyk, 2000) to more critical and emancipatory approaches (Zuber-Skerritt & Teare, 2013). BDAL, is a process of integrating work on a critical business challenge with individual, team, and organisational learning for the purpose of employing sustainable business solutions whilst developing leaders and societies (Boshyk, 2010).

A severe difficulty in researching action learning is the lack of an agreed definition by authors as there is no universal agreement on the definition of action learning (Chenhall & Chermack, 2010). Action learning has been discussed amongst academics and practitioners and has different meanings to different individuals (Pedler, et al., 2005; Weinstein, 1995). This is summarised in the statement by Marsick and O’Neil (1999, p. 159) when they wrote that

action learning “means everything and thus nothing”. Overall, action learning can be difficult to understand as Dilworth and Willis (2003, p. 15) describe it as a “collective mosaic.” Within action learning itself, there are many forms, which was emphasised by Boshyk (2000, p. vii) when he wrote “the house of action learning has many doors.” Willis (2004) emphasised that even in the action learning community and among action learning practitioners, there is no common mental model or theoretical position of action learning.

Lack of understanding is further complicated by the fact that action learning draws inspiration from adult learning theory, management science, psychology, behavioural and laboratory science, anthropology, systems theory and cybernetics in evidence (Dilworth & Willis, 2003). Action learning has been applied to organisational development, management development, team building and transformative learning (Dilworth, 1998). Consequently, this accentuates that action learning is an evolving practice, and there is a need for further development of the action learning practice.

While the lack of agreed upon definitions is a challenge, there are consistent elements in all types of action learning, namely: participants meet in small groups of four to six people called a set (O’Neil & Marsick, 2007) where they work with set members sometimes called “comrades in adversity” (a term used by Revans which has been updated and called “fellows in opportunity” (Mumford, 1996, p. 5). All action learning shares three fundamental elements: real workplace action, learning from common experiences and a social interaction in a group (Cho & Engan, 2009; Sofu, et al., 2010). It is also generally agreed that action learning has six elements namely a problem or task, a group, the reflective inquiry process, action, learning, and an action learning coach (Marquardt & Waddell, 2004). Smith and O’Neil (2003) identified the following generic elements of action learning programmes: participants grapple with actual business problems as they occur, participants work in small and stable learning groups called sets, sets meet regularly and there is a fixed programme duration, the business problems participants deal with are relevant to their own working environment, participants take action between meetings and questioning and reflection plays a major role in the learning process.

Learning in action learning takes place while working on a business problem (Revans, 1971). Learning in an action learning context is “the systematic acquisition of knowledge in the form of facts, principles and truths” (Ajoku, 2015, p. 3). However, it is not only the acquisition of knowledge that encompasses learning as participants learn from the “process of action learning” rather than the “content” of the action learning project (Beaty, et al., 1997, p. 186). Revans (1998, p. 83) wrote; there is “no learning without action and no action without learning”, which emphasizes the value that action learning brings to management development as it incorporates both learning and action. Revans was influenced by the philosophy of Dewey (Pedler & Abbott, 2013) who maintains that learning integrates experience, concepts, observation and action (Dewey, 1938). Pedler (1983) concludes that if the emphasis during action learning is only on the task of completing the project, rather than learning, then this limits action learning. Learning in action learning happens in a cycle of work that the participants produce in order to encourage thinking about the work problem in a different way, reflect on the work and then engage in more teamwork, thus enabling a self- directed team (O’Neil & Marsick, 2007).

The aim of action learning is to increase the speed of learning, solve complex problems and impact various levels of learning: individual, group and organisational (Boshyk, 2010). To meet the needs of the changing environmental landscape the learning in action learning must be faster than the rate of change for organisations, teams and individuals, not “equal to or faster than” as mentioned by Revans (Boshyk, 2010, p. 78). The philosophies applied when implementing action learning are often different, but no matter which type of action learning is chosen, the focus is primarily on individual learning and development (Cho & Egan, 2010; Lysø, Mjøen & Levin, 2011; Marsick & O’Neil, 1999; Raelin, 2008). Previous studies point out that action learning is successful when individual learning and personal growth are reviewed (Pedler, et al., 2005; Vince, 2004). The organisation also benefits as there is the assumption that organisational impact can in fact be attained through individual learning (Nilsson, 2010). Individual learning is contextualised and situational as each participant has a different experience while working on the project. Burger (2013) emphasises that participants own the knowledge they produce and

tailor-make their personal pursuit of learning. Thus, participants decide on their own learning objective while working on a project. It can be concluded that the value of learning for the individual is difficult to articulate but is viewed as a key outcome.

Action learning has no guidelines for implementation but includes principles to guide the philosophy (Pedler, et al., 2005). The key principles are the utilisation of questioning and reflection while working in an action learning group called the *set* and this leads to learning (Ajoku, 2015; Beaty, et al., 1997). A condition for action learning according to Revans (1998, p. 8) is that it has “a significant risk of a penalty for failure”. The resulting paradox in action learning is that the risk of failure and anxiety that is created as part of learning cannot be too high as it hampers learning (Robertson & Bell, 2017). Appreciating the risk of failure in action learning supports the interpretation that all action learning approaches both support and undermine learning. This contradiction is essential if learning is to take place (Vince, Abbey, Langenhoven & Bell, 2017). The lack of an agreed definition means that action learning is open to interpretation. Due to the numerous definitions and understanding of action learning, this present study will apply Boshyk’s (2010) Business-Driven action learning to provide boundaries to the research.

### **2.3.1 Different types of learning that are confused with action learning**

Different types of learning that are often confused with action learning include cognitive, experiential and problem-based learning (Sofu, et al., 2010). The confusion is that all three types include reflective questions. However the theoretical assumptions are different between them as action learning is about learning from concrete action, reflection on that action, group discussion, trial and error, discovery and learning from and with each other (Marquardt, et al., 2009; O’Neil & Marsick, 2007; Pedler, 1996). To add, action learning is not about experiential learning, which is the process of knowledge creation through the transformation of experience (Kolb, 1994; Vince, 1998), nor is it problem-based learning, which is about solving complex open-ended problems (Raelin, 2008).

Often, action learning is confused with experiential learning and problem-based learning as the word *action* is misunderstood. The word *action* is important to note as the notion of what constitutes action may be problematic (Ashton, 2006; Rooke, Altouyan, Young & Young, 2007). In action learning, the action means doing and doing means learning (Marquardt, Senge & Goodson, 2010). One of the key principles of action learning is that action takes place and then one learns from this action, which is in contrast to most learning, in which one learns and then acts (Marquardt, et al., 2010). Pedler (2005, p. 4) describes action in action learning as the “basis of learning” and Raelin (2008, p. 85) describes action as the “pathway to learning”. Action learning is about learning “through action or during the action itself” (Sofu, et al., 2010, p. 206), which means that the task of problem solving in a group is the “vehicle for learning” (Raelin, 1999, pp. 115-125).

### **2.3.2 Action learning in a management development context**

Action learning is one of the most widely used instructional methods applied in leadership and management development (Amagoh, 2009; Boaden, 2006; Dilworth & Boshyk, 2010) and is applied in diverse contexts (business, education, health and public sectors) (Cho, 2013). This present study is bounded in management development programmes. Action learning is applied to management development programmes instead of lecturing and teacher focused instruction, as these approaches have failed to develop teamwork, leadership, and problem solving skills necessary for managers to be successful in the 21<sup>st</sup> century (Brotheridge & Long, 2007; Roglio & Light, 2009). Although action learning can have a positive impact, however the process of action learning need to be examined for improving management development programmes (Amagoh, 2009; Garavan, O’Brien & Watson, 2015).

Action learning has a different design in comparison to traditional management development programmes (Mumford, 1995). The key element of an action learning management development programme is that it is designed around the action learning problem, rather than management competencies. This makes it an effective design strategy in developing the kind of management skills most needed in today’s world of work (Marquardt, et al., 2009). Most importantly in the process of applying action learning to management development

programmes is that it works with new patterns of thinking rather than predictable ways of thinking (Marquardt, 1999). The reason to use action learning in a management development context would be to help managers solve difficult problems while boosting individual learning and development (Pedler & Abbott, 2013). The attraction of action learning is that it can concurrently solve difficult challenges and develop people and organisations at a minimal cost to the business (Marquardt & Waddill, 2004). During action learning there can be a tendency to over-emphasise action at the expense of learning (Willis 2011), especially in management development programmes, such as in this present study, where the programme carries a qualification (Edmonstone, Lawless & Pedler, 2019). If individual learning is one of the main reasons for applying action learning to a management development context then individual learning requires further understanding. It is individual learning that this present study explored. Revans (1982, p. 13) stated: “you cannot change the system unless you also change your ‘self’.”

### **2.3.3. Action learning frameworks**

A number of action learning frameworks have been developed. To name a few: Gregory’s (1994) Action Learning Group Process, Paton’s (2001) Systemic Action Learning Cycle and the Systemic Action Learning Spiral, Cho and Egan’s (2009) Key Dimensions of Action Learning, and Bong, Cho and Kim’s (2014) Conceptual Action Learning Framework. Action learning design is seen as a key success factor (O’Neil & Marsick 2007; Pedler & Abbott 2013; Revans, 2011) however little consideration is given to the design process (Bong, et al., 2014). To supplement the literature the aim of this present study was to explore how (if at all) individual transformative learning could be embedded into a BDAL framework.

Action research and action learning can be confused. Zuber-Skerritt (1990, p. 241) defined action learning as “a basic concept of action research” (Zuber-Skerritt, 1990, p. 214). Like action learning, action research presents as a diverse field. Lewin sees action research as “planning, action, and fact-finding”, which is an “iterative process” of conducting research, evaluating, and conducting further research (Burnes, 2004, p. 984). Action research and action learning both tackle real organisational problems, but the difference is that

action learning goes beyond just the organisational problem to learning (Rigg & Coglan, 2016). It is this individual learning that requires further exploring.

Paton's (2001) research includes two frameworks: The first is the Systemic Action Learning Cycle (SALC) which describes four phases based on Critical Systems Theory: *alert, comprehend, consider, compare and act*. Alert: the inquiry is initiated, requires analysis of a situation. Comprehend: understand the situation via reading literature, interviews, and surveys with people in the situation. Consider: is the act of planning the specific type of systems model to be applied. Compare: the model created is compared with what is known about the situation. Act: closure of the analysis activity. The second framework is the Systematic Action Learning Spiral that includes the four phases of SALC into a series of loops that are repeated. In this framework "it is not the finished product of an analysis which is of significance, but the process of investigation which is undertaken" (Paton, 2001, p.109). These two types of frameworks focus on research of the situation using models rather than learning so they are not applicable to this present study.

In a research from South Korea, there are two action learning design frameworks based on Cho and Egan's (2009) and the research from Bong, et al. (2014). The first framework is Key Dimensions of Action Learning (Cho & Egan, 2009) and the second framework is Conceptual Action Learning Framework (Bong, et al., 2014). These South Korean authors have designed two action learning frameworks that are unique as they use an action learning coach to bridge the gap between learning and action (Cho, 2013). The South Korean authors conclude that action learning should be context specific and participants who implement this type of action learning come from a background where it is not appropriate to question, which is a key aspect of action learning. Hence the need for an action learning coach to guide the action learning process (Cho, 2013). These two frameworks differ from other action learning approaches due to the particular context where each learning approach is applied, the degree of structure in the learning process, and the role of a learning coach (Cho, 2013). In comparison to Revans' approach and Boshyk's approach which follow a scientific approach where action learning coaches are

initially used but then must withdraw from the action learning process as the learning is driven by the participants not the action learning coach.

The first framework, seen in Figure 2.2 is Key Dimensions of Action Learning (Cho & Egan, 2009), which includes a multi-method elaboration, testing, and critical analysis of key features of action learning. This framework is an example of process-based design in a management development programme. This framework views action learning as an intervention and process that includes four critical elements: the initiation of action learning, action learning intervention deployment, action learning implementation, and action learning evaluation.

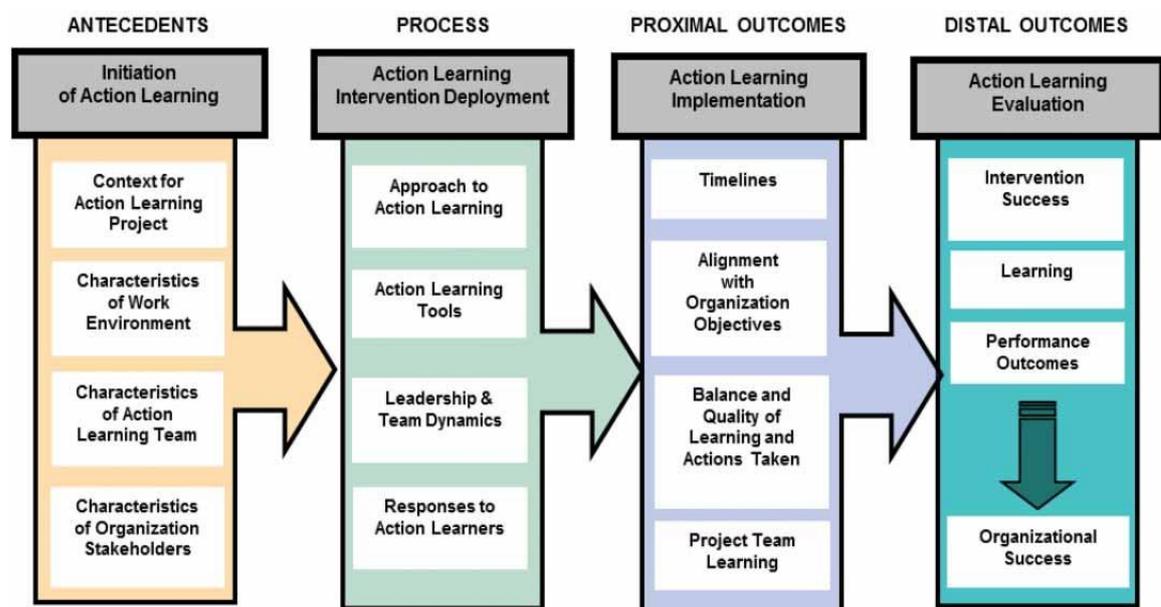


Figure 2.2 Key dimensions of action learning (Cho & Egan, 2009, p. 45).

Cho and Egan's (2009) framework includes antecedents, which are necessary for the initiation of action learning. These include: the context for the action learning project, the characteristics of the work environment, the make-up of action learning teams and stakeholders. The process includes the approach to action learning, (type of action learning chosen), action learning tools, leadership and team dynamics and responses to the learners (participants). The proximal (near) outcomes include timelines for the business challenge, the extent to which action learning is aligned with organisational objectives, the balance and quality of learning and actions taken and project team learning. The distal (far) outcomes includes intervention success, learning and

performance outcomes all of which contribute to the organisational success (Cho & Egan, 2009). It is the *learning* component in the distal outcomes that requires further understanding. The framework is unclear on how the term *learning* applies to individual transformative learning.

These antecedents, processes and proximal and distal outcomes in Cho and Egan's (2009) framework infer that a systems approach should be taken in action learning. This implies that there are components in the framework that need to take place before, during and after an action learning experience.

The second framework, seen in Figure 2.3, is a Conceptual Action Learning Framework (Bong, et al., 2014). This framework has five key headings: environmental analysis, purpose and product definition, project selection and definition, people analysis and process design. Each heading consists of components that contribute to the framework.

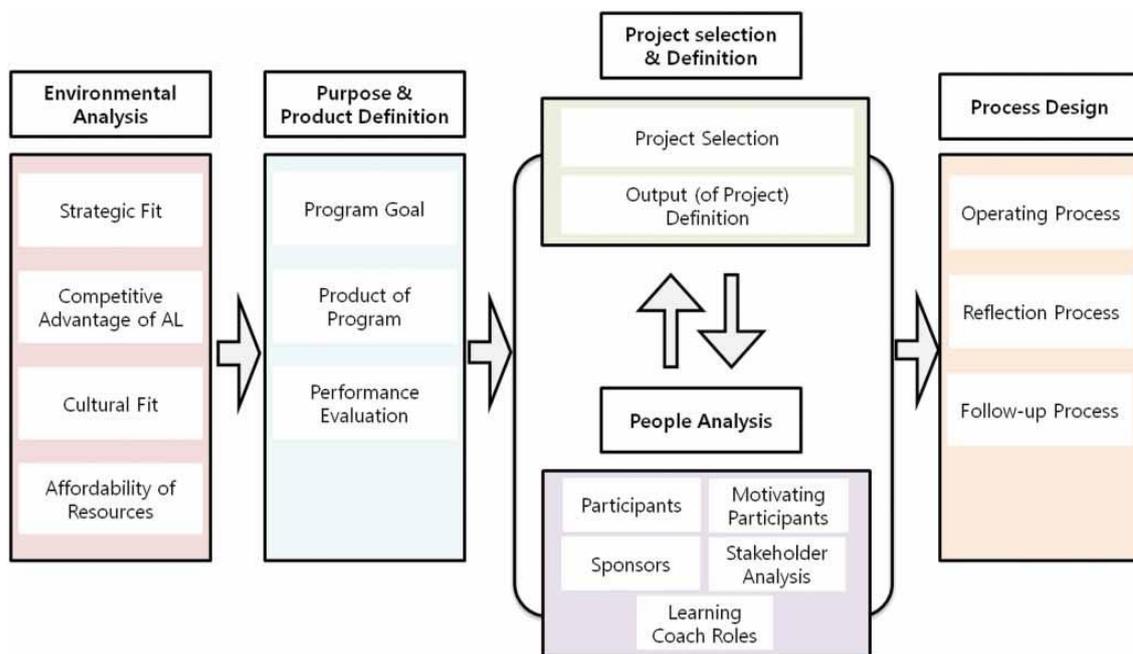


Figure 2.3 Conceptual action learning framework (Bong, et al., 2014, p. 292).

Bong, et al. (2014) do not describe each component in the framework but instead provide a set of questions that the action learning practitioner can apply in the decision making process of action learning. The set of questions include a heading *classification* (e.g. environmental analysis), *category* (e.g. strategic fit a component of environmental analysis) and *decision making questions* relating to the component (e.g. "how will action learning contribute to an organisation's

strategic goal?) (Appendix 2). Bong, et al. (2014) recommend that the framework together with the decision making questions is applied to the design of action learning. Bong, et al. (2014) advocate that all stakeholders in the programme need to be considered before making decisions, making this framework unique to the action learning literature as it provides a framework for customisation of management development programmes. These decision making questions researched by Bong, et al. (2014) are a useful concept in this present study as one of the research sub-questions (Q4) was: “What conceptual guidelines can be recommended for the four key stakeholders: the sponsoring organisation, the learning institution, the participants and the action learning facilitator to aid individual transformative learning in BDAL. However, in Bong, et al.’s (2014) research their decision making questions are linked to their action learning framework, which is not specific to BDAL.

A criticism of the research from Bong, et al. (2014) in Figure 2.3 is that it does not have a learning component in the design, which was included in Cho and Egan’s (2009) framework. In Figure 2.3 under the heading *purpose and product definition*: the component *product* includes the following questions “what will be the outcomes (e.g. competence and knowledge” that participants would acquire? What would be the intended output? (Bong, et al., 2014 p. 290) are included however there is a gap in understanding how these outputs relate to individual transformative learning.

One of the reasons why management development programmes incorporate an action learning component into a management development programme is that action learning encourages learning awareness from an individual, team and organisational perspective. Cho and Egan’s (2009) framework does not expand on the learning concept and in Bong, et al. (2014) the word *learning* is not included. In these two frameworks, little attention is given to the concept of individual learning, specifically individual transformative learning. In both Korean frameworks, there is room to consider other factors that may influence the components in the framework, especially if the aim is to promote individual transformative learning. When looking at management development programme design, Pedler and Abbot (2013, p. 57) wrote “the aim of the program designer is to achieve a minimum critical specification, that is, the minimum – not the

maximum – of structure, rules and procedures needed to make the collaboration work”. This present study is aligned with Pedler and Abbot’s (2013) thinking on not creating too much structure and this can be seen in the new conceptual framework: TBDAL (Chapter Six).

In conclusion, there is scope to add to the research on these the two action learning frameworks with regards to individual transformative learning as some of these aspects can be incorporated into BDAL in a management development programme context. Overall, there is a risk of complicating learning by over-designing or by presenting frameworks that are too complex to implement. The intent should be to present a framework that can also be applied in practice. Moreover, the philosophy of action learning and the importance of BDAL being a balanced action learning approach in both solving the business challenge and personal challenges should not be forgotten.

#### **2.3.4 Five schools of action learning**

Despite the controversial attention linked to the lack of definitive categorisation, action learning has taken numerous forms and has evolved into varying constructs depending on what school of thought the researcher supports (O’Neil & Marsick, 2007). One way to minimise the perplexity around the definitions of action learning is to place action learning into five schools of how learning takes place according to the practitioners. The concept of schools was applied by O’Neil and Marsick (2011; 2007) to bring order to action learning and understand the different forms that exist. There are five schools of action learning: Scientific, Experiential, Tacit, Critical Reflection and Collaborative Self-Directed Learning (O’Neil & Marsick, 2011).

In the Scientific school, identified by Revans (1982) and Boshyk (2010), learning takes place through asking questions and includes the learning formula of  $L$  (Learning) =  $P$  (Programme knowledge) +  $Q$  (Insight gained by questioning) (Revans, 1983, p. 11). This school includes Revans’ method for achieving managerial effectiveness that he called “Alpha systems, Beta systems and Gamma systems” (O’Neil & Marsick, 2007, pp. 169-170). The alpha system, which is the strategy system, includes the analysis of the external environment, internal resources and the managerial value system. This aims to identify what

strengths and weaknesses are present in the internal environment, opportunities and threats in the external environment. The second element is the beta system, which is the decision system and includes implementation of the decision by survey, trial, action, audit and consolidation. This is also known as the “cycle of institutional learning” (Revans, 1971, p. 129). It involves planning, action, reflection and learning. The third element is the “gamma system”, which is the learning process as felt by each participant, which includes self-questioning and awareness of self and others. This third system of gamma is of particular interest to this present study as it involves the individual’s learning during their interactions in alpha and beta. This system asserts that it is the individual who must make sense of the connections between the three systems (Revans, 1971). In practice, these three systems are not separated and are seen as a whole practice.

In the scientific school, or traditional action learning, Boshyk (O’Neil & Marsick, 2007) uses the term *Business-Driven Action Learning (BDAL)* where the emphasis is on implementation and development through teamwork and coaching. At the Global Forum on Business-Driven Action Learning, Leadership and Organisational Development in Cambridge, Boshyk (2015) described BDAL as a philosophy and an approach that addresses business challenges. “Business-Driven Action Learning is a term used to describe a results-focused orientation to individual leadership development and organisational learning and change” (Boshyk, 2002, p. 30).

The experiential school is the second school identified by McGill and Beaty (1995), Kolb (1984) and Mumford (1995; 1996). Learning takes place in the cycle where the experience takes place; reflection then occurs and experience is shared with others; the experience is then checked against the theory to explain what happened and applied to practice (O’Neil & Marsick, 2007). This school of thought should not be confused with the use of the Kolb Learning Style Inventory, which is a questionnaire advocated by Boshyk (2000) in setting up BDAL sets.

Experiential learning is often linked to action learning even though it is essentially a separate type of learning (Boud, Cohen & Walker, 1993). In all of Revans’ work, there is no indication of him adapting his scientific action learning

from experiential learning, particularly Kolb's experiential learning cycle as Revans' approach was based on the scientific method of survey, hypothesis, experiment, audit and review (O'Neil & Marsick, 2007).

Tacit school is the third school identified by Dotlich and Noel (1998) and Tichy and Cohen (1997). They believe in incidental and tacit learning and the emphasis is on action and the results of the project. They assume that learning takes place as long as there are the correct participants in the set who work together (O'Neil & Marsick, 2007).

Critical reflection school is the fourth school identified by Marsick and O'Neil (1999) and Raelin (2008). This school takes action learning beyond reflection to focus on questioning to make better decisions. In this approach, there is explicit reflection on individual goals. Marquardt, Leonard, Freedman and Hill (2009) explain critical reflection as thinking about what we know and how we know it. Through this school, participants can learn to ask effective questions rather than always thinking of the answer, which leads to high-quality decision making and working with different points of view (O'Neil & Marsick, 2007). Critical action learning is separate from other action learning due to the engagement with peer dynamics, emotions and power relations (Pedler, 1996). This is also highlighted by Vince (2002) who writes that emotions and politics are not separate during the learning process.

O'Neil and Marsick (2011) updated their four schools of thought to include a fifth school: Collaborative Self-Directed Learning, which is associated with communities of practice. Action learning is used to "foster the environment needed for collaboration" (O'Neil & Marsick, 2011, p. 186).

The school of action learning chosen depends on the organisation's goals, participants' needs and resource availability (Bong, et al., 2014) as well as the readiness of the organisation for action learning (O'Neil, 2007). In this present study BDAL, which is part of the scientific school is chosen, as it meets the needs of the sponsoring organisation hence the learning institution choice to apply this school to their management development programmes.

## **2.4 BUSINESS-DRIVEN ACTION LEARNING (BDAL)**

BDAL is part of the scientific school of action learning as it achieves business outcomes and follows the alpha, beta and gamma systems. In BDAL the set works together to solve a real business challenge while concentrating on conversations and learning (Boshyk, 2011). BDAL is described as a:

“results-focused method and set of principles used by organizations and their teams to address actual business and leadership challenges, and to explore new opportunities; while doing so, BDAL also focuses explicitly on the learning as well as the business outcomes from these activities, and both in turn accelerate, enhance and sustain change, longer-term organizational and business performance, and individual leader development” (Boshyk, 2011, p. 145).

In summary BDAL follows Revans’ action learning philosophy, however it is also a process where a set works on a critical business challenge whilst contributing equally to individual, team, and organisational learning (Boshyk, 2010).

### **2.4.1 Why BDAL is chosen in management development**

BDAL is chosen in management development programmes as it is an action learning approach that is integrated and balanced in terms of action on a real life problem and learning (Boshyk, 2011). Boshyk (2011) believes that Revans’ action learning focuses more on learning than action, whereas BDAL is mostly initiated in management programmes where the focus is putting action back into action learning. BDAL is important in management development programmes as it places the emphasis on action which Casey and Pearce (1977) emphasise has been missing in management development programmes. BDAL involves acting on business problems using diverse sets, to both enhance the business and develop the participants (Bolt & Boshyk, 2005), thus making it an appropriate philosophy to apply in management development programmes.

Action in BDAL is based on the real-world business challenge that the set addresses. The action component is one of the reasons why line managers and the sponsoring organisation support BDAL (Rolland, 2006) and the learning component is the reason behind learning institutions choosing to apply BDAL in their management development programmes (Boshyk, 2011).

### **2.4.2 The business challenge and the personal challenge in BDAL**

BDAL, as advocated by Boshyk (2010), involves an organisational business challenge but also advocates working on a personal challenge. When choosing the business challenge Revans (2011) included four options: a familiar problem in a familiar setting; a familiar problem in an unfamiliar setting; an unfamiliar problem in a familiar setting; and an unfamiliar problem in an unfamiliar setting. Boshyk (2010) advocates that the sponsoring organisation chooses a strategic business challenge that is supported by a business sponsor.

In terms of setting personal challenges Boshyk (2011, p. 148), posits that the “learning is explicit” in BDAL due to the process of reflection. Learning in BDAL is described as individual, team and organisational learning (Boshyk, 2010). Individual learning in BDAL is described as “personal learning, significant learning, higher-level professional development, situational and emergent,” which suggests that this cannot be identified beforehand (Beaty, et al., 1997, p. 187). However, individual learning in BDAL lacks clarity and it is the development of the individual participant and their individual learning which remains unexplored in the action learning literature (Cho & Egan, 2010). The learning aspect is sometimes ignored in BDAL as participants are so busy focusing on the task of completing the business challenge (Svalgaard, 2016). When debating problem solving during the business challenge versus learning, it is important to remember the historical origins of action learning as a philosophy rather than a set of techniques, a way in which learners might develop wisdom, not simply cleverness (Rigg, 2015).

### **2.4.3 BDAL frameworks**

This section includes three frameworks regarding BDAL design. The first view is expressed by Boshyk (2011; 2014), the second by Rolland (2006) and the third by Mercer (in Boshyk, 2000). This present study enquires into the process of BDAL from Boshyk’s perspective even though all three views are very similar. Boshyk’s (2014) BDAL component parts is depicted in the model in Figure 2.4. This framework includes the following components: top executive ownership, challenges, knowledge capture and sharing, company-wide sharing and

collaboration with stakeholders, teamwork, outside-in and external perspectives, individual development and recommendations on business challenge.



Figure 2.4 Boshyk's (2014) component parts framework

All component parts in the model need to be included into a management development programme design for BDAL to be successful (Boshyk, 2014). The component parts are explored below.

#### Antecedents: Top executive ownership

The action learning project team (set) works on one common problem that is owned by a senior person who is a sponsor. This sponsor is outside of the set but has responsibility for the business problem. The business challenge should be important to the business, complex and strategic in nature to amplify the thinking of participants (Hicks, 2002). Action learning sets do not have the authority to make the changes in the business without the support of the sponsor. Set members learn the skill of stakeholder engagement and how to work with the sponsor (Marsick & O'Neil, 1999).

The sponsor confirms the business challenge with the set by clarifying the company issue and a list of what is expected from the set tackling the business challenge (Boshyk, 2011). Volkema (1995) reports that defining the problem directs the solution. The set's role is to research the topic and present

innovative recommendations. The process involves participants who self-organise themselves, their leadership and interpersonal skills. The common goal is to prepare a presentation to their senior executives in their company about their recommendations on the business challenge, their learning from the programme, and personal challenges and their commitments to deal with them. Boshyk (2002) cautions sponsors not to impose on the creativity of the set but rather play a role in identifying the business challenge and supporting the journey through BDAL.

#### Antecedents: Challenges

As a result of working on the business challenge and personal challenges BDAL develops the strategic leadership capability of senior leaders to drive business results (Boshyk, 2002). BDAL develops leadership capability by addressing real business performance and leadership challenges.

#### Process: knowledge capture and company-wide sharing

As participants work on the business challenge, data is gathered and analysed, and this data should be placed in a central place (an information technology platform, such as a website). This information is beneficial for personal and general and post-programme reference (Boshyk, 2011).

#### Process: collaboration with stakeholders

The purpose is to engage all those who have a vested interest in the problem and support the internal research (Boshyk, 2011). These are people who, in Revans' (1982) words, "know, care, and who can do something about helping participants solve and make good recommendations on the Business Challenge". Part of the process is for sets to design an extensive stakeholder list and engagement plan. One of the key stakeholders is the sponsor who supports the action learning set. Collaboration with stakeholders is managed by participants asking open-ended questions (Boshyk, 2011).

#### Process: Teamwork

The set works on a business challenge and personal challenges, but there are dynamics in learning sets, which cause emotions to arise (Rigg & Trehan, 2004).

### Process: Outside-In dialogues and external discussions

In the medical field, Revans organised a programme called the Hospital Intercommunication Research where one hospital visited another to view their operating system. This resulted in a drop in the death rate of patients and hospital stays (O'Neil & Marsick, 2007). This approach of visiting other businesses or units is called *Outside-in* and is a process which includes dialogue, with all external stakeholders relating to the business challenge/problem. It involves discussions with external stakeholders on best practice regarding the business challenge and other issues relating to the external environment of the organisation. Outside-in dialogues take place with the subject matter experts, the Personal Development Advisor and all stakeholders relating to the business challenge (Boshyk, 2011). Revans (1982) described stakeholders as people who know, care and who can help the participants in making effective recommendations on the business challenge. Meetings with stakeholders are written up and shared with members of the set (Boshyk, 2011).

### Proximal outcomes: Individual development

Boshyk (2011) recommends that a Personal Development Advisor helps clarify issues around personal challenges. Individual development involves personal and peer coaching, sharing personal development plans and reflection. This role is not an intrusive one. It involves assisting and encouraging individuals to gain greater self-awareness that leads to behavioural change through the use of coaches, psychometric, 360s and learning tools. If BDAL aims to enhance the individual, the team and the organisation, a greater understanding is needed on individual development. It has to be kept in mind that BDAL must be a balanced action learning approach to balance between learning and action.

### Proximal outcomes: Recommendations on business challenges

The set presents their findings and recommendations to a panel. Organisational implementation and evaluation and further personal leadership development is included in this presentation.

One of the aims of this present study is to help practitioners to successfully implement BDAL that facilitates transformative learning within a management

development context. In Boshyk's component parts, transformative learning is implied but not specifically mentioned. Boshyk's (2014) component parts can be expanded upon to ensure the success of BDAL in a management development programme context so that transformative learning is promoted.

In addition to the component parts framework, there are a set of questions that Boshyk (2011) advocates for the participant to apply as part of learning. The seven questions are broken down into organisational, team and individual learning questions. These questions are dimensions of learning, which are key to the BDAL process and include (Boshyk, 2011, pp. 17-18):

1. *The big picture: What do I want to/did I learn about the external environment of my business, industry, country, and region (about politics, economics, society and culture, technology, and other matters outside of my business)?*
2. *My Organisation: What do I want to /did I learn about my organisation (its culture, way of doing business, customer relations, values and other things)?*
3. *My Teamwork: What do I want to/did I learn about my team effectiveness?*
4. *Myself: What do I want to/did I learn about myself? About my values?*
5. *How I learn: What did I learn about how I learn?*
6. *What can be used in another context? From my learning, what can I apply in another situation?*
7. *Who needs to know about my learning? Who else needs to know about all of this learning?*

The set can work through these questions as part of reflection during BDAL. In addition, participants are given the opportunity to write their own personal journals if they so wish where they reflect on their learning. This emphasises reflection as a critical component of BDAL.

The second view, in addition to Boshyk's component parts, is Rolland's components. Rolland's (2006, pp. 898-901) components of BDAL are not as in-depth as Boshyk's. He summarised the components into four phases including:

*(1) Business issue definition. This phase links the problem to the strategic intent of the business. The sponsor should be the main stakeholder, as they want to answer the issue. The challenge for the participants is to find reflective elements, manage ignorance as emotions are critical and allow or block knowledge sharing. The phases occur when participants conduct interviews in order to construct*

*different ideas and meaning in order to find solutions about the issues they have defined.*

*(2) Teamwork. This phase is built on questioning and reflection. The purpose is to share knowledge, know-how, competencies and experiences about the business opportunity.*

*(3) Recommendations. This phase identifies all the potential solutions and selects a solution. The solutions are presented to the executive team and the sponsor is included in this presentation.*

*(4) Implementation. One of the participants should be responsible for the implementation of the recommendations.*

The third view is provided by Mercer (in Boshyk, 2000, pp. 179-190) who lists the methodology for a typical project as including preparation, implementation, support structures, team process issues, closure (recommendations and presentation) and reflection, which are expanded upon further.

- *Preparation: Involves understanding the problem. Implementation includes planning what data is needed, scheduling meetings and deciding on the team process approach, ground rules, leadership roles, gathering data and conducting interviews;*
- *Support structures: Clarification from the business contact (called the sponsor) and the coach;*
- *Team process issues: Goals, resources, dealing with conflict, making decisions, communication, participation, division of tasks, method of integrating information, asking the right questions;*
- *Recommendations: Identify options, prepare and make presentation to the management team on recommendations to solve the problem; and*
- *Reflection: On team process, individual contribution, peer feedback and lessons learnt.*

In summary, Boshyk's, Rolland's and Mercer's frameworks help in defining the structure of BDAL. These BDAL frameworks do not include an interventionist role such as that of the action learning coach as the belief is that adult learners do not have to be taught (Boshyk, 2011). Despite this, in this present study, the BDAL sets are assigned an external action learning facilitator as part of the management development programme. Their role is, however, not to teach the set but to guide the set on group dynamics and the practice of BDAL. In the BDAL literature, this role is called the 'Personal Development Advisor' (Boshyk, 2011). Therefore, the term *action learning facilitator* is included as one of the key stakeholders as they play a role in the design and implementation of BDAL.

In this present study the main research question is how should a BDAL framework be designed to facilitate individual transformative learning during a management development programme. The sub-questions take on a systems approach to BDAL, as per Cho and Egan's (2009) framework. Two of the sub-questions for this present study include (Q2): What are the preconditions that create an environment for individual transformative learning during BDAL?. Q3: What outcomes resulted from the BDAL experience? Boshyk's (2010) identifies individual development and recommendations on the business challenge as the 'proximal' outcomes of BDAL. However it is individual development, specifically individual transformative development that requires greater understanding and these could be called distal outcomes. As most of the literature refers to the term *action learning* rather than *BDAL*, there is a dearth of literature on BDAL in a management development programme.

## **2.5 CRITICAL SUCCESS FACTORS IN ACTION LEARNING**

Action learning, according to Pedler and Abbott (2013), is subtly simple until it is put into practice. There are a number of challenges in getting action learning started and maintaining it effectively. This section addresses the success factors in action learning: readiness to learn, programme design, the set, power and control, action learning coach, reflection, and the action learning project. Each of these success factors are explored in this section.

### **2.5.1 Readiness to learn in action learning**

Readiness to learn is one of the key requirements of adult learning. Readiness to learn in action learning is a critical success factor since not all participants and all organisations are ready for this type of learning intervention (Pedler, 1996).

Readiness to learn is seen when the participant's subjectivity has been attended to so that it relates to their needs in work and life (Freire, 1993). Participant readiness can be seen as a pre condition that exists within the participant even before the program commences (Raelin, 2006). If the participants are ready, they are able to see their own views as tentative and be open to the views of others (Shulman, 2002), thereby enabling participants in

action learning to become more critically aware of their own assumptions and defences (Raelin, 2006).

Lack of readiness to learn can lead to resistance by participants as they struggle to assess their own needs and work with others. Resistance can be seen in either active or passive resistance (Hultman, 1995). Raelin and Raelin (2006) describe resistance as active resistance where one sabotages any attempts to learn – or passive resistance where one remains unchanged by the experience.

Bourner (2011a) concludes that it would be beneficial to develop a participant readiness checklist which can be applied to the initiation of action learning programmes. Bourner (2011a) identified the following factors that indicate readiness: good at listening, good at asking insightful questions, being proactive, value reflective learning, value the acquisition of self-knowledge, try out new ideas and get pleasure from encouraging other people. If the participant is not ready, then perhaps action learning is not the correct methodology of learning to apply to the management development programme (Bourner, 2011a; Breathnach & Stephenson, 2011).

### **2.5.2 Programme design**

The design of action learning programmes (O'Neil & Marsick, 2007; Pedler & Abbott, 2013; Revans, 2011) is among the key success factors mentioned in literature. Specific action learning conditions need to be considered in programme design. Rothwell (1999, p. 35) summarises these learning conditions as questions:

1. *Can the organisation influence or control the problem?*
2. *Is the issue important enough to invest time and money in improvement?*
3. *Will the problem gain support from stakeholders and key groups?*
4. *Does the organisation have expertise on the problem and does the team have the necessary skills and knowledge?*
5. *Is the action learning team free to work on the problem to find solutions? Does the team have a mandate to work on the problem?*
6. *Will the effort of working on the problem build competencies in the group that they will need in the future?*

If these learning conditions are not met, there are alternative learning

methodologies that can be applied instead of action learning, such as: forming a task force, establishing a committee, forming a cross functional team or asking managers to solve the problem. In addition to Rothwell's (1999) learning conditions, it is essential that Boshyk's (2011) seven dimensions of BDAL are built into the management development programme design to encourage individual, team and organisational learning. If the design of BDAL into a management development programme is not well thought through then the BDAL project is sometimes tacked onto the end of a management development programme and becomes just a team project. In conclusion, there is not enough attention paid to the management development programme design in action learning (Bong, et al., 2014). In BDAL, Boshyk (2014) includes component parts and seven dimensions that aid in the design of BDAL. The question is can additional components be added to Boshyk's component parts as part of the BDAL design to create an environment that promotes individual transformative learning?

### **2.5.3 The action learning set (team)**

One of the key components of action learning is that participants work in a team of peers, called the set. Action learning is driven by the needs of set members and not by an expert facilitator (Pedler, 1997). Action learning places value of the set over lecturers, experts and facilitators (Pedler, et al., 2005).

Action learning can create high-performing sets that can successfully solve problems (Dilworth & Willis, 2003; Rigg & Richards, 2006; Rimanoczy & Turner, 2008). Sets have become more fundamental for organisational productivity and success as well as an important source of learning for individuals (Peters, 1992). Eight key characteristics of successful action learning sets were identified by Marquardt, et al. (2010) namely: clear and meaningful goals; explicit positive norms; strong interpersonal and communication skills; competence and commitment around solving problems and performing tasks; trust, openness, and group cohesiveness; ability to manage conflict; shared leadership and continuous individual and team learning and improvement.

Action learning takes place in a social context, which can be seen as either a threat or as a support and source of learning (Reynolds & Trehan, 2003). Vince

(1996) criticises Revans and Kolb's lack of investigation into the social context of action learning as he sees sets contributing to the construction of individual and group identity.

"Environmental uncertainty" occurs when poor team dynamics cause participants to feel disengaged from the action learning project (Marquardt & Yeo, 2012, p. 216). Resistance in action learning is not an unwillingness to learn, but a response to threats perceived in the social context such as the complex dynamics of set relationships, personal experiences, expectations and perceptions (Burger, 2013). Argyris (1999) states that when people experience a negative response, they unconsciously activate a defensive routine to protect themselves, which is anti-learning. A threatening situation can activate a defensive routine for some participants as they feel the need to protect themselves against threats or embarrassment. This is mostly an unconscious process and can lead to "self-reinforcing, anti-learning processes" (Argyris, 1999, p. xv).

For the set to perform, psychological safety is necessary, this is more than interpersonal trust. Edmondson (2002) concludes that psychological safety occurs when the team believes that it is safe for interpersonal risk taking. As a result of psychological safety a sense of confidence is created in that team members will not embarrass, reject or punish someone for speaking up (Edmondson, 2002). The results from Edmondson's (1999) research supported the suggestion that team psychological safety affects learning behaviour, which affects team performance.

Griffiths, Winstanley and Gabriel's (2005) research revealed that sometimes participants wear masks of happiness, self-confidence and assertiveness to conceal deeper vulnerabilities and fears. Their research also advocated that learning could be improved in a positive emotional climate, where conflicts are discussed and where respect for differences are recognised. Hence the paradox of action learning as the environment needs to stretch the participant to learn and solve the business challenge, whilst at the same time creating a safe environment in which to learn (Robertson & Bell, 2017).

The contradiction in action learning is that very few sets have a rich blend of both *action* and *learning* necessary to function well (Marquardt, et al., 2009; O'Neil & Marsick, 2007). The blend of *action* and *learning* is one of the reasons why BDAL is applied in the first place (Boshyk, 2014), if both *action* and *learning* are not balanced then it is questionable if BDAL really exists as the business challenge becomes just another team project without addressing individual learning.

#### **2.5.4 Power and control**

Action learning is associated with the set's ability to solve an organisational business challenge, meaning that learning in an action learning set is linked to organisational dynamics and hence power plays a role. Power may influence the overall learning in the set and the set's ability to solve the business challenge as some participants may wield more power than others in the set. Action learning always takes on a collective emotional context that includes complex interpersonal relations, as well as the everyday politics and ingrained power relations within the organisation (Vince, et al. 2017).

The word *power* has so many different meanings and is a contested concept. Lukes (2005) describes three power dimensions, starting from observable domination, to behind-the-scenes agenda-setting, to subtle manipulation of opinion. These are known as visible, hidden and invisible power in Gaventa's (2006) powercube. VeneKlasen and Miller (2002) see power as the power to (the capacity to act), power with (collective action), and power within (dignity and self-esteem).

Action learning groups are not removed from the emotions and politics in the context that they are accustomed to, as they "are beset with the range of inequalities, tensions and emotional fractures that characterise groups, organisations and societies" (Trehan & Rigg, 2015, p. 793). In addition to organisational power relations, there are the concepts of *power and powerlessness* which relate to the participants in any team process. Even if participants are at a lower level of management, they have access to sources of power (Hofstede & Boddewyn, 1977). Vince and Martin (1993) state that all set members move between positions of being powerful and being powerless and

that they move towards learning or make choices that hamper learning. The fact that participants are partaking in a management development programme with the consent of their organisation already gives the participant a positive power base from which to operate.

Within the action learning process, there are various power struggles and it is important to consider how power relations impact the learning in an action learning set, especially if members of the set feel powerlessness. Action learning sets experience power struggles that include intense emotions, such as fear, hatred, rage and contempt (Vince & Martin, 1993). Smith (2001) writes that emotions and politics experienced by set members can be difficult and complex and that some participants can be in “over their heads” from a developmental perspective (Kegan, 1994).

Action learning sets are an opportunity to explore power at the “me, us and them” levels so that there is an organisational and individual focus, which enables learning to be embedded (Pettit, 2010, p. 31). Once one has gained power, the use of power or any behaviour that attempts to alter someone’s attitude or behaviour is known as influence (Van Buren & Hood, 2011). When focusing at an individual perspective, power can be seen as an individual’s ability to influence another (French & Raven, 1959; Pfeffer, 1981).

Action learning is a network of interactions between different stakeholders (Hawkins, 2011), such as the participants, the sponsor, line managers, work colleagues and the set themselves. The action learning project can fail if the stakeholders’ views, power and influence are not taken into consideration. Power depends on the value systems of the participants, value systems are based on the norms of participants’ reference groups and on the surrounding society as determined by historical, educational, political, philosophical and economic factors (Hofstede & Boddewyn, 1977).

French and Raven (1959) add to the concept of social power that is independent of change, and includes reward, coercive, legitimate, referent and expert power. Participants in an action learning set have limited legitimate power, as the set is made up of peers, with whom they debate and struggle. Some participants may have some expert power as they may understand the

business challenge more thoroughly compared to the other set members, but mostly, action learning does not include the use of experts in the programme design. The main reason for understanding power and control in BDAL is that it may hamper the learning process.

### **2.5.5 Action learning coach (action learning facilitator)**

The action learning coach is also called the *Set Advisor* or *Accoucheur* (Pedler & Abbott, 2013), *Personal Development Advisor* or the *Action Learning Programme Manager* (Boshyk, 2011). What is important to note is that the person who is the action learning coach may be a working group member or an external person (Marquardt & Waddill, 2004). In BDAL the term *action learning coach* is not used as the approach taken is that the set must take responsibility for their own learning. In this present study, the action learning coach is an external person who works for the learning institute and plays the role of facilitator, and is hence called the *Action Learning Facilitator*.

There are a variety of approaches with regards to coaching in the action learning literature, as the approach taken depends on the school of thought to which the author ascribes to. Action learning does depend on the theoretical foundation of the action learning facilitators/coach and the goals of the sponsoring organisation and participants (Anderson & Thorpe, 2004; Rigg & Trehan, 2004; Zuber-Skerritt, 2001). O'Neil (2007) summarises the approaches taken in Table 2.1. BDAL fits into the Scientific School of thought which limits the role of the coach to set advising and set initiating. In this present study, the BDAL sets meet without the action learning facilitator being present. In this present study the set has contact sessions with the action learning coach/facilitator during the management development programme, which includes an introduction to BDAL during an orientation session, BDAL contact sessions (set sessions) during the workshop and formalised set contact sessions between the study schools (Appendix 1). The sets also meet frequently in their own time where they share the research they collected and ask critical questions.

Table 2.1 Schools of thought linked to action learning and the role of the coach (O'Neil, 2007, p. 102).

The four schools	Role of the coach	Interact with the team/set
Tacit School	No learning coach, information provided by experts.	Provide information to the team by lectures and exercises and focus on team building.
Scientific School – which includes BDAL	Role of set advising and set initiating, the role of the coach could be in the beginning stages of the team forming.	Focus on task and team process looking at systems Alpha, Beta and Gamma.
Experiential School	Role of learning coach is integral part of the design to help support the team throughout the learning cycle. Role is not to teach but use questions or model questions.	Focus on task and team process looking at personal development.
Critical Reflection School	Learning coach plays an important role in creating opportunities for critical reflection. Coach is not a team member and normally comes from outside of the culture.	Focus on task and team process looking at personal development and organisational issues. Create opportunities to think differently.

Action learning coaches are in a position where they can help create an environment where the participants learn for themselves and learn from others (Lawlor, 1991). In so doing, coaches apply strategies to create a different lens (or meaning perspective) through which the participant may reinterpret experiences (Burger, 2013). The coach's main role is to create the right conditions for action learning (Pedler & Abbott, 2013). As can be seen in Figure 2.5 the action learning facilitator can hold the space for learning between the individual participants and the set (Robertson & Bell, 2017). Trust is part of creating the right conditions as participants need to feel that there is an environment of safety before they expose personal information, question themselves and others in the set, engage in reflection and challenge the organisation (Casey, 2011; O'Neil & Marsick, 2007).



Figure 2.5 The action learning facilitator in BDAL (Robertson & Bell, 2017).

Pedler, et al. (2005) sees the role of the coach as being highly significant. However, Revans (2011) was dismissive, if not opposed towards the coaching role, which he saw as helping to get the process started. Marquardt et al. (2009) and Rimanoczy and Turner (2008) agree with Revans as they conclude that adult learners know how to apply relevant guidelines and then do things by themselves; hence, there is no need or place for the coach to play an interventionist role. Marquardt (1999, pp. 37-38) sees the role of the coach as one of “manager and facilitator.” Included in this role is the coordinating function where the coach ensures that those who are not part of the set understand action learning, promote analytical behaviour in the group, especially in the early stages of the programme, observe group process, group climate and guide communication to help participants take responsibility for their own learning and development. Boshyk does not include the coach in his BDAL component parts framework, which implies he does not support the role of the coach.

In contrast, Ram and Trehan (2010) emphasise the role of the coach in supporting learning, in that they have the power and ability to link reflection into complex emotions. Brammer (1973) confirms that the involvement of the coach is determined by the set in that they need to define what help they need from the coach. Normally, the coach is very involved in the initial stages of the group

formation, while participants gain confidence and develop and then the coach gradually withdraws and becomes fairly inconspicuous as the action learning set develops (Gibson, 2012; O'Neil & Marsick, 2007).

O'Neil's (1999) research addressed what action learning coaches do and why they do it, and what they think is distinctive about their role in helping individuals learn from their experience. Key findings relevant to this present study are that learning coaches who have a theoretical underpinning of how action learning takes place apply this learning in practice. Reflection is a key underpinning in action learning. One of the main functions of the coach in the practice of reflection during action learning (Raelin & Raelin, 2006) and asking the right questions, which enables thinking in new ways (Hoe, 2011; Pedler, 1991). Reflection can take on various forms (Rolfe, 1997) and includes various creative approaches (Dewing, 2010). In addition, the action learning coach draws attention to relationships, strategic business issues and personal growth (Allen, Poteet & Burroughs, 1997; Hargrove, 2003). In O'Neil's (1999) research on action learning, coaches discussed working with a set at the task and process level and then mentioned moving away from the process level to the learning level. Burger (2013) conducted research on the centrality of resistance in action learning where she identified the importance of the action learning coach in helping the participant to interpret experiences so that they can deal with resistance, which can be achieved by helping participants to believe in their own capacity.

*Facilitation* is a contested word in action learning, whose aim is to help participants reach their own goals (Corey & Corey, 1992). In this present study, the action learning coach and the action learning facilitator term is used interchangeably as the theory uses the word facilitator but in practice participants use the word coach. The action learning facilitator acknowledges the right of every person to make independent choices about what they do or do not do in the set (Heron, 1993). In this present study, the facilitator's role was not initially included as part of the management development programme that is informed by BDAL, however as participants emphasise the need for more support this role was added and all management development programmes in this present study included an action learning facilitator. This decision supports

the Korean's action learning approach of Cho and Egan (2009) who advocate that coaching is necessary due to cultural aspects. This present study supports Heron's (1999) view of coaching where a matrix of eighteen options for facilitation using six dimensions is advised: planning, meaning, confronting, feeling, structuring and valuing. These are linked to three modes of facilitation: hierarchal, co-operative and autonomous. Action learning facilitators can apply this matrix to their set interactions to create awareness of options available to them depending on each situation and need.

Most research in favour of the action learning coach is from people who perform the role of coach (Bourner, 2011a). However, there is little evidence on the need to do away with the coach, even though Revans did not see the action learning coach as necessary. Revans did not want the coach to provide the expert answers, hence moving back into traditional management development methods. Bourner (2011b) believed that the management development environment is a very different environment for action learning in comparison to what Revans experienced in the 1950s, as it is now much more receptive to action learning. O'Neil and Marsick (2007) suggested that without the action learning coach, the learning is driven by the task itself.

Coaches use a variety of skills during action learning (O'Neil, 1997). Skills that are necessary for a coach to master include: thinking outside of the box, crossing boundaries (mental, imagine, functional, political), integrating perspectives, and experimenting with feedback (O'Neil & Marsick, 2014). Process consultant skills are considered imperative for the coach, but there are additional skills which are needed to take the action learning to a deeper level (O'Neil, 1997; Weinstein, 1995). These include encouraging reflection and "saying nothing and being invisible" in order to let the set learn from their own experience (O'Neil, 1999, p. 181).

In addition to working with the set, O'Neil (2007) includes external elements that the coach needs to consider, such as:

- The relationship with the sponsor in co-design of the project;
- Managing time, as time is short; and
- Length of the management development programme.

Suggested tools to consider in the management development programme design that can be utilised by the action learning coach include: a 360-degree feedback report or psychometric assessments how the person sees him or herself and how the person has learned to learn (through the Learning Style Questionnaire from Peter Honey and Alan Mumford) (Boshyk, 2011). Learning styles are self-reported explanations of an individual's preferences for and insights of how they process information. They do not assess performance or ability. "Learning styles, in effect, are applied cognitive styles, removed one more level from pure processing ability" (Jonassen & Grabowski, 1993, p. 234). Participants may find the diversity of learning styles and learning approaches quite distressing due to the differences it creates within the set (Loo, 1999; Sadler-Smith, 2001); and the coach is able to talk each participant through the benefits of the styles. Lastly, the action learning facilitator can encourage participants to apply journals as part of their learning and reflection.

#### **2.5.6 Reflection**

Reflection is a mental process of 'folding' or 'bending back' the deliberation of some subject matter, idea, practice or purpose, in order to make sense of it and make enhancements for the future (Jacobs, 2008). Action learning requires reflecting on experiences, which is a basis for learning (Gregory, 1994). Reflection in action learning is part of the meaning-making process, as participants seek to understand new or dissonant ideas and integrate them into their knowledge structures (Scott, 2017). Reflection, in this context, provides a means by which participants are given the opportunity to resolve and integrate their experiences and understanding (Billett, 2011) during workshop discussions and set discussions. Gibb (2009, p. 223) supplements this viewpoint by affirming that action learning extends beyond "learning by doing" and incorporates facilitated reflection, deriving new knowledge and bringing intelligence to perceived experiences. Participants in an action learning management development programme attend workshops and work on an action learning project where reflection forms a "bridge between theory and practice" (Mason, 2014, p. 169). If reflection is lacking, it prevents individual learning (Edmonstone & Flanagan, 2007).

In literature, reflection is often an individual process (Schmutz & Eppich, 2017)

but in action learning, reflection also takes place individually and within the set. Reflecting as an individual or set during action learning is the process of carefully considering experience which helps in making sense of social and political elements, not just technical processes (Trehan & Rigg, 2012). Set reflection involves collective reflection on the experiences so as to develop and even create knowledge, while at the same time serving to improve practice (Raelin & Trehan, 2015). This set reflection can be called *reflexivity*, which is a concept from psychology and management literature (Schmutz & Eppich, 2017). Team reflexivity can be defined as (West, 2000, p. 296):

*The extent to which group members overtly reflect upon and communicate about the group's objectives, strategies (e.g., decision making) and processes (e.g., communication), and adapt them to current or anticipated circumstances.*

Stark (2006) had emphasized that set reflection promotes personal development and helps participants to learn about learning. Reflexivity (Gode & Barbaroux, 2012) is central to action as it refers to the learning gained through evaluating one's experience. Reflexivity may contribute to team competence and team performance, which ensures good team functioning and learning (Schmutz & Eppich, 2017).

Reflection is seen as a continuous exercise during learning (Schön, 1987). Schön (1983) called this reflection-in-action; where assumptions are analysed. In agreement with Schön, Revans (2011, p. 69) included reflection on the "here and now" as important as reflection "upon the action of yesterday and anticipate the action of tomorrow". Both authors, therefore, believe that reflection is not a once-off event but a continuous practice.

Action learning includes triple-loop learning, which consists of questioning perceptions, expectations, beliefs, opinions, preferences and assumptions about what the person learnt about themselves (Marquardt, et al., 2009). People learn about themselves in triple-loop learning by reflecting on their experiences (Marquardt, et al., 2009). Triple-loop learning occurs when the participants question their own learning process. This involves reflecting and looking for patterns in behaviour, knowledge or process (Marquardt & Waddill, 2004).

Reflection can help identify where *unlearning* needs to take place. *Unlearning* takes place when the participant has to go through a process of rethinking and then challenging concepts they already know (Hedberg, 1981). Undoing this previous learning causes a “rupture” experience that rejects previous thinking and behaving and allows new ways to be introduced (Sofu, et al., 2010, p. 210). This rupture causes the current paradigms to be challenged so there is an interaction between single-loop and double-loop learning (Nonaka & Takeuchi, 1995; Senge, 2006). The process of uncovering mental models that propel assumptions through critical questioning is termed *double-loop learning* (Raelin 1997). Learning may involve the undoing of earlier learning (Akgun, Lynn, & Byrne, 2003; Chia, 2003; French & Vince, 1999; Sheaffer & Mano-Negrin, 2003). References to unlearning in education literature highlight the process of unlearning, which includes the need to ensure a safe environment for unlearning and personal transformation (Kohn, 2000; Nicole, 1996; Soto-Crespo, 1999). The process of unlearning starts with valuing collected knowing, reflecting positively on its impact, showing gratitude to those who created that knowing and unlocking the possibility of undoing identity (Buchen, 1998).

Reflection enables a ‘rupture’ (Sofu, et al., 2010) and causes current paradigms and mental models to be challenged (Senge, 2006). Mental models are deeply held images of how the world functions, which affects what we do because they also affect what we see (Senge, 1998). The theory of mental models comes from Johnson-Laird (1983) who argues that they are structural correlations of the world. Mental models help participants make sense of the world but also limit understanding (Kim, 1993). Surfacing individual mental models and making them overt can hasten learning and contribute to the development of the participants, thus making learning explicit (Kim, 1993). In this present study, this is essential if individual learning is to become visible to the participant.

The inclusion of reflection in an action learning context allows for dialogue to surface and contends with participant’s expectations, aspirations and achievements in practice and in so doing, may restructure their meaning and identity (Raelin & Trehan, 2015). Restructuring meaning and identity can be painful as Dewey (1916, p. 26) observed:

*Reflective thinking is always more or less troublesome because it*

*involves overcoming the inertia that inclines one to accept suggestions at their face value; it involves willingness to endure a condition of mental unrest and disturbance. Reflective thinking, in short, means judgement suspended during further inquiry; and suspense is likely to be somewhat painful.*

The worth and importance of reflection in education is recognised, but that does not mean it is easy to get it right as it is a “complex, rigorous, intellectual, and emotional enterprise” that is not easy to do well (Rodgers, 2002, p. 245). In BDAL which aligns to the scientific school of action learning, reflection is not as obvious in comparison to other schools of action learning (Marsick & O’Neil, 1999) such as critical reflection. Boshyk (2010) does not include reflection in his components part framework but includes dimensions of learning questions (Boshyk, 2011) where reflection takes place at the organisational, team and individual level. The dimensions of learning (Boshyk, 2011, pp. 17-18):

1. *The big picture: What do I want to/did I learn about the external environment of my business, industry, country, and region (about politics, economics, society and culture, technology, and other matters outside of my business)?*
2. *My Organisation: What do I want to /did I learn about my organisation (its culture, way of doing business, customer relations, values and other things)?*
3. *My Teamwork: What do I want to/did I learn about my team effectiveness?*
4. *Myself: What do I want to/did I learn about myself? About my values?*
5. *How I learn: What did I learn about how I learn?*
6. *What can be used in another context? From my learning, what can I apply in another situation?*
7. *Who needs to know about my learning? Who else needs to know about all of this learning?*

One of the main forms of reflection during action learning takes place via questioning that takes place individually or within the set (Marquardt & Waddill, 2004). Another reflection strategy applied to action learning is a learning journal. O’Neil (2007, p. 92) posits that a “learning journal – a book for recording one’s thoughts and feelings as one tackles a problem and experiences the program, responses during reflection opportunities, and thoughts on project work – is a useful tool to help support both the task work and the learning of each participant”.

During action learning the participants learn from real-life situations (Marquardt, 2000; Dilworth, 1996). However, participants do not always find the set an

appropriate forum for personal concerns (Clydesdale, 2016). This makes a journal a better learning mechanism for self-awareness and relationship skills (Clydesdale, 2016). Boshyk (2011) believes that the learning journal should include the seven dimensions of learning. Alternatively Brook and Milner (2014) describe the journal as a reflective log that is not given a mark as part of assessment on the programme. The format of the log includes questions such as:

- What did you learn from today's meeting?
- What did you learn about yourself?
- What did you learn about your strengths?
- What did you learn about your areas of development?
- How have you contributed to the learning of other team members?

Mann and Clarke (2007) conclude that writing, as an act of reflection, promotes deeper learning as the participant writes down observation about their actions, their thinking about the actions and the significance of the actions taken. This process of writing can help participants to develop into reflective practitioners. However, additional work is needed to clarify how reflection can be incorporated into management development (Di Stefano, Gino, Pisano & Staats, 2015) as not all participants have the necessary skill to journal (Clydesdale, 2016, Stewart, Keegan & Stevens, 2008).

Writing is an action of reflection but so is drawing hand-drawn images. Hand-drawn images have been suggested to facilitate the expression of attitudes and personal feelings (Weber & Mitchell, 1996) as well as assumptions, which exist in the farthest limits of awareness (Shepherd, 2016). Therefore, hand-drawn images enable entry into unconscious content and processes in individuals, as drawings make it possible to explore in-depth emotional aspects and relational contexts (Kearney & Hyle, 2004; Newton, Long & Sievers, 2006; Nossal, 2013). This is relevant in this present study as action learning involves an emotional context and complex interpersonal relations (Vince, et al., 2017). In this present study hand-drawn images was one of the methods of data gathering that was applied to access the participant's learning. Vince (2001) applied the task of drawings to highlight important thoughts and emotions. In summary, hand-drawn images are considered a helpful exercise for facilitating reflection

(Löfström & Nevgi, 2014).

Journaling that includes writing and hand-drawn images can encourage mindfulness. Mezirow (1991) described the transition from mindlessness to mindfulness as transformative learning. The concept of mindfulness has been adapted by Western researchers from Buddhist spiritual practices that focus upon insight and awareness of one's emotions and behaviours (Bodhi, 2011). Most commonly, researchers have defined mindfulness as the awareness that arises through paying attention in a purposeful way to an on-going moment and doing so non-judgmentally (Kabat-Zinn, 1994).

*Mindfulness* is the opposite of *mindlessness*, a term used by psychologist Ellen Langer (Yussen, 1985, pp. 267-285), where the behaviour is routine or habitual. There is, however, some difficulty in operationally defining mindfulness because the term "mindfulness" has been used to describe a psychological trait, a practice that cultivates mindfulness, a state of awareness, and a psychological process (Germer, Siegel & Fulton, 2005). Despite these differences in defining the construct of mindfulness, it is generally clear that mindfulness varies both within persons and between persons (Weinstein, Brown & Ryan, 2009). Reflection during action learning aims to make the participant mindful of their behaviour and actions.

Surprisingly, despite the importance of reflection, there is limited literature on any systematic, developmental approach to facilitate reflective learning across management development programmes (Ryan & Ryan, 2010). This may be due to the fact that reflection is often seen as a skill that participants should have already mastered. Yadin and Or-Bach (2010) wrote that participants are expected to have already become skilled learners before they attend a management development programme. There is an implicit assumption that participants have already mastered the skills associated with learning such as analysing, synthesising, combining and comparing to previous knowledge, making generalisations and reflecting.

In conclusion, reflection is not easy to implement however it is a necessary part of learning. Consideration is needed on how to build a reflective space into BDAL management programmes to promote learning. The participant should

take on the role of *reflective practitioner*, a term introduced by Schön (1983; 1987) where *reflection-in-action* and *reflection-on-action* takes place: implying the significance of acting in the world and reflecting in and upon those actions. In addition, the action learning facilitator plays a role in encouraging a safe space for reflection.

### **2.5.7 The action learning project**

BDAL includes a project that focuses on a real-world problem, called the business challenge, where the set gathers information on a business problem in order to find possible solutions (Rothwell, 1999). The problem is determined by the organisation based on their business need, and this creates a results-driven learning process (O'Neil & Marsick, 2007). The selection of the right problem is critical to success in action learning (Lawrence, 1991).

The action learning business challenge is referred to by many authors as a “wicked problem”, a term that originated with Grint (2008, pp. 11-18) Wicked problems are messy and do not require rational planning but rather, leadership and learning (Pedler & Abbott, 2013). BDAL sets typically present recommendations to a wicked problem being faced by the organisation and if feasible they take action. Wicked problems exist in a variety of environments and are described as socially complex, fragmented and typically have many stakeholders (Carson, Emmons, Falone & Preston, 2012). Pedler and Trehan (2008) also described wicked problems as messy, changing under research and over time and contradictory. Traditionally, each sets focus on a single organisational problem, as is the case in this present study (Marquardt, 2004; Marquardt et al., 2009). A well-defined business challenge includes clear boundaries, a timescale and a detailed end result. Working on an on-going and complex problem in an organisation can be equally productive and more applicable to what participants actually want to do (Mumford, 1995).

The business challenge itself creates an opportunity for internal dissonance as the business challenge impacts on how participants view their internal world (including emotions) and how they interact with the external world (Marquardt, et al., 2009). The business challenge itself can create many challenges as the participant may feel demotivated if their solution is not implemented due to a

lack of funds or the solution being politically sensitive for the problem sponsor (Kim, 2007; Park, 2004). If the participant does not feel connected to the business challenge “cognitive passivity” occurs (Marquardt & Yeo, 2012, p. 216). Mumford (1995, p. 38) wrote that “the action learning project itself has become another technique introduced without any learning strategy and with no connection to any central core of belief about how managers learn”.

## **2.6 BENEFITS AND CHALLENGES IN ACTION LEARNING**

Action learning is described as “magical” by Dotlich and Noel (1998, p. 14) as it is a learning experience that meets the dual objectives of problem solving and learning. Even though there are many benefits to action learning the dual objective of problem solving and learning is what causes challenges in action learning (Marquardt, 1999). This section explores both the benefits and the challenges of action learning.

### **2.6.1 The benefits of action learning**

The IFAL Action Learning Survey (2013) identified the top three benefits to the individual involved in action learning as being self-awareness, learning from others’ experiences and receiving feedback from other set members (Walsh, 2013). Pedler (2011) summarised benefits as: action learning provides the opportunity for participants to learn new things about themselves and their performance that allows them to test out new views and approaches and to discover new ways of interacting with others. Johnson (1998) found that action learning improved empathetic listening, enhanced ability to formulate more informed actions, and encouraged higher readiness to take responsibility and initiative.

Weinstein (1995) and Davey, Powell, Powell and Cooper (2002) discovered that participants in action learning sets learn to listen, accept criticism, and are open with one another. Action learning can be used to advance learning, change and knowledge sharing within the organisational system (Yeo & Nation, 2010; Volz-Peacock, Carson & Marquardt, 2016). Marquardt (1999) described both the individual and the organisational benefits as shared learning across different levels in the company, improved self-awareness, the ability to ask better questions, reflecting on experiences and improved communication with the set.

He concluded that action learning developed the following competencies: focus on process and product, self-understanding, questioning skills, how to work in a group, leadership skills, facilitation skills and knowledge about the organisation.

Action learning increases participants' ability to collaborate due to the impact of intrinsic motivation (Passfield, 2002). When participants achieve their personal learning goals, which are outside of their comfort zone, they experience feelings of empowerment and these internal processes lead to self-efficacy, autonomy, meaning and responsibility (Raelin & Raelin, 2006). Burger (2013) encourages boosting participants' belief in their own ability as it helps them enter a cycle that promotes learning.

However, there is a lack of understanding regarding the invisible individual learning that takes place as a result of action learning (Bong & Cho, 2017). Individual transformative learning could be part of this invisible individual learning.

### **2.6.2 Challenges in action learning**

Action learning should be challenging which implies that there is always risk of failure as Revans (1998, p. 8) confirmed a condition for action learning is that there is "a significant risk of a penalty for failure". Failure can include the solutions not being implemented in the organisation or the set struggling to work together and team dynamics' impact on solving of the problem (Burger, 2013). The predominant risk with action learning programmes is when participants do not have time to take action, or when a higher value is placed on action than on learning, it can result in failure (Dinkin, 2013). Failure can be seen when the participants experience too much anxiety, which can be linked to academic capacity, participant's role in the set and the experience of being left alone without support while experiencing strong pressure to perform (Burger, 2013).

In terms of working together and team dynamics, high levels of anxiety might be experienced by some participants involved in action learning as they expect to be taught knowledge by an expert. Most people know how to be taught but not many know how to learn (Marquardt, et al., 2009). Participants are not taught during action learning as they define their own goals and learning objectives and if participants are not comfortable with this, it could create high levels of

anxiety. This assumption is due to the participant assuming that knowledge is a “transferable, objectified product of thought, not a thought event, not connected with human beings, not tied to an observer, not related to a particular situation or atmosphere that would make it come alive and render it useful” (Von Foerster & Poerksen, 1998, p. 65). In action learning there is no expert during action learning who has pre-determined answers and solutions. Kozubska and MacKenzie (2012) assert that participants need the ability to cope with the frustration of not knowing as this alone is a skill set. Besides this culture of dependence, some participants find dealing with their job and daily demands a difficulty and limit reflecting on their goals (Marquardt, et al., 2009). Vince and Martin (1993) and Simpson, French and Vince (2000) suggest that when learners experience anxiety during an action learning programme, they have options. They can consciously or unconsciously participate in a cycle that prevents learning by adopting a fight-or-flight attitude, which transforms into open resistance, or they choose to hold on to the tensions and take the risk of fighting for their learning. Resistance to learning and uncertainty is a struggle within action learning sets and may trigger serious self-doubts about participants’ own capacity to cope with the expectations of the programme, which Bandura (1982; 1994) calls self-efficacy.

The learning that takes place during BDAL can result in participants experiencing stress, anxiety and high levels of frustration (Robertson & Bell, 2017), which is known as *learning shock*. Learning shock involves acute confusion and unease. Learning shock can be caused by unfamiliar learning and teaching methods, such as those utilised in BDAL, as well as and conflicting expectations (Griffiths, et al., 2005). Due to learning shock, there is an emotional content to action learning, which some participants may find difficult to deal with (Beaty, et al., 1997). Learning shock could become a positive milestone for the participant, so it is not necessarily a negative experience (Griffiths, et al., 2005). Learning shock has the potential to inhibit all learning, while enhancing it and opening new possibilities as it can reconstruct identity, outlook on life and values hence, the paradox of learning.

In addition is it not only the experience of action learning that is a challenge. The challenge is that the participants are not able to act on knowledge as they

may be missing, concepts, models, theories and frameworks that are necessary to apply to the action learning process (Beatty, et al., 1997). Lastly, the transfer of learning varies as it depends on how participants change in knowledge, insight, understanding, meaning, attitudes, competencies and/or behaviour outside of the programme (O’Neil, 2007). In conclusion even though action learning has many benefits it is a challenging process to work with.

## **2.7 TRANSFORMATIVE LEARNING**

The second theory in this present study is transformative learning. O’Sullivan (2012) describes transformative learning as different to other forms of learning. Newman (2012) prefers the term ‘good learning’ rather than transformative learning. For the purposes of this present study, Hoggan’s (2016, p. 71) definition is applied: “transformative learning refers to processes that result in significant and irreversible changes in the way a person experiences, conceptualises, and interacts with the world.” Even though Hoggan (2016) uses the word ‘irreversible’ transformative learning is not an absolute in that it is a process and not a “point of arrival” (West, 2014, p. 177). Taylor (1997, pp. 43-44) describes transformative learning as “recursive, evolving, and spiralling in nature”, thereby, showing the multi-dimensional elements of transformative learning.

Hoggan (2016) in his research concludes that transformative learning is being applied to almost any instance of learning, which is a significant problem. To solve this concern he views transformative learning as an analytic metatheory. Hoggan’s (2016) definition was chosen because he includes a typology of learning (worldview, self, epistemology, ontology, behaviour and capacity) which defines the distinct ways in which the learner changes. In addition, Hoggan (2016) confirms that in order for individual learning to be transformative it must include *breadth* (number of contexts to which the learning is applied), *relative stability* (implies that the change is irreversible and that a certain amount of time has passed, hence the permanence of transformative learning) and *depth* (the impact of the change and the degree to which affects a particular outcome is affected). Hoggan only has one definition of transformative learning and set parameters so that transformative learning is explicit. Hoggan’s (2016) criteria was applied to this present study with the aim to explore how (if at all)

individual transformative learning could be embedded into a BDAL framework, and address the research sub question (Q1): To what extent did participants experience individual transformative learning during BDAL?

Some key authors of transformative learning, their definitions of transformation and the schools of thought are summarised in Table 2.2. What is evident is that there are various definitions of transformative learning that align to various schools of thought (Taylor, 2008).

Table 2.2 Definitions and schools of transformative learning

School of TL	Transformative learning descriptions from literature	Author
Psychocritical view.	Transformation theory attempted to explain the process by which “an individual’s problematic frames of reference are transformed to be more inclusive, discriminating, open, reflective and emotionally capable of change.”	Mezirow, 2009, p. 92.
	The key purpose of transformative learning is to help the person become aware of how and why their assumptions have come to inhibit the way they perceive, understand, and feel about their world. “Reflectively transforming the beliefs, attitudes, opinions, and emotional reactions that constitute our meaning schemes or transforming our meaning perspectives.”	Mezirow, 1991, p. 223.
	“Transformative learning refers to processes that result in significant and irreversible changes in the way a person experiences, conceptualises, and interacts with the world.”	Hoggan, 2016, p. 71
	Emancipatory education and liberation.	Freire, 2000.
	Six core elements: individual experience, critical reflection, dialogue, holistic orientation, awareness of context, and authentic relationships. Life experience: “provides a deeper well from which to draw on and react to as individuals engage in dialogue and reflection.”	Taylor, 2009, p. 6.
Social emancipatory view	This view includes equity and social justice.	Casebeer & Mann, 2017.
Neurobiological view	Sees transformative learning as discovery driven that alters neural pathways.	Janik, 2005.
Developmental	Making sense of things based on context and intuition.	Daloz,

School of TL	Transformative learning descriptions from literature	Author
view	In terms of the developmental approach it is essential that participants start doing something new in the work environment for transformation to take place	1986, 1999.  Kets, De Vries & Korotov, 2007.
Psycho-developmental view	Is about change which spans across a lifespan in the context of interpersonal relationships.	Kegan, 1994.
A psychoanalytic view	Based on Carl Jung's work, focuses on the "establishment and elaboration of a conscious relationship with one's unconscious."	Dirkx, 2012, p. 120.

Transformative learning results in critical thinking which replaces the participants' world view (Mezirow, 2000). McNaron (2009) supports Mezirow's point about the end result of transformative learning in that participants recognise their assumptions, find them mistaken and revise them, thereby becoming independent and critical thinkers. The aim of transformative learning is to help the participant become empowered, self-directed and more socially responsible (Kiely, 2005). Mezirow (2000, p. 29) wrote that promoting greater independence in thinking is both a goal and a method as "even partial autonomy requires communicative competence and transformative learning."

It can be tough to ascertain what is truly transformative, as transformative learning occurs from an individual perspective, which is personal and difficult to confirm or deny (Mezirow, 1998a). In conclusion, despite being promoted as a means of change, Cranton (2006, p. 6) notes "oddly, we have few resources for practitioners" to which she further writes "how can transformative learning be encouraged? This draws attention to the design and practice of transformative learning in management development programmes as consideration on how to encourage an environment that supports transformative learning is needed to support the participants potential for change.

## **2.8 APPROACHES TO TRANSFORMATIVE LEARNING**

Transformative learning has been popular within and outside of adult learning since Mezirow introduced the concept. To help refine and contain transformative learning, Hoggan (2016) has since published a typology of

learning. Hoggan (2016) developed an analytic meta-theory that distinguishes Mezirow's perspective transformation, based on the explicit processes of disorienting dilemmas, critical dialogue, and critical self-reflection, from transformative learning. Hoggan's (2016) typology of transformative learning reflects six areas in which change may take place: worldview, self, epistemology, ontology, behaviour, or capacity. In this section, Mezirow, Sterling and Hoggan's approaches are expanded upon.

### **2.8.1. Mezirow's approach to transformative learning**

Transformative learning in a management development programme is not about gaining knowledge, but about making sense of the experience. Mezirow (1991, p. 161) views transformative learning as "an enhanced level of awareness of the context of one's beliefs and feelings, a critique of one's assumptions, and particularly premises, and an assessment of alternative perspectives." This section explains Mezirow's terminology such as a disorienting dilemma, meaning perspective, meaning schemes and frames of reference, as well as Mezirow's transformative learning phases.

Mezirow (1978, p. 7) introduced "ten elements" of transformative learning which were later called 'phases' (Mezirow, 2000, p. 22). The ten phases included:

- 1 *A disorienting dilemma;*
- 2 *Self-examination of feelings;*
- 3 *Critical reflection;*
- 4 *Recognising that others may share similar discontent and have negotiated change;*
- 5 *Exploration and planning of new roles, relationships and actions;*
- 6 *Acquiring knowledge and skills;*
- 7 *Trying out new roles and actions;*
- 8 *Negotiating relationships;*
- 9 *Building competence; and*
- 10 *Re- integration into life with new perspective as a basis.*

Even though these phases are portrayed as occurring in a linear manner, the process may continue in a more circular and spiralling fashion and may not incorporate all phases (Taylor, 1998). Mezirow (1991) later expanded the original ten phases to include an additional phase, "renegotiating relationships

and negotiating new relationships” (Mezirow, 1994, p. 224).

Taylor (2000) describes a *disorienting dilemma* as a single event or a long accumulative process. Disorienting dilemmas are internal or external personal crises (Mezirow, 1978) where the participant searches for something that is missing from their lives (Taylor, 1998). Another word for a disorienting dilemma is a powerful experience, which can contribute to learning on a number of different levels – “cognitive, social, emotional and existential” (Scoffham & Barnes, 2009, p. 267). A disorienting dilemma activates intense feelings (Matthew-Maich, Ploeg, Jack & Dobbins, 2010). Action learning also gives rise to an emotional context (Vince, et al., 2017). Daloz (2000) deems that disorienting dilemmas can have a cumulative effect over time. An example of this would be Mandela’s (cited in Daloz, 2000, p. 106) words when he wrote, “I had no epiphany, no singular revelation, no moment of truth, but a steady accumulation of a thousand slights, a thousand indignities, a thousand unremembered moments.” Daloz (2000, p. 105) wrote, “although a single event may catalyse a shift or a particular story might dramatize a transformation, closer examination reveals that change or shift was long in coming and its possibility prepared for in myriad ways, generally across years.” Similarly, Cranton (2006, p. 57) expresses that the transformative process is “provoked by a single dramatic event, a series of almost unnoticed cumulative events, a deliberate conscious effort to make change in one’s life”.

A major component in transformative learning is a *meaning perspective*. A meaning perspective refers “to the structure of cultural and psychological assumptions within which our past experience assimilates and transforms new experience” (Mezirow, 1985, p. 21). Transformative learning results in a new perspective, one that is “more inclusive, discriminating, open, emotionally capable of change and reflective”; in other words, it is more developed (Mezirow, 2000, p. 7). Perspective transformation occurs when the participant’s perspective has been changed, which takes place when the participant is critically aware of how and why their assumptions limit the way they understand the world and by changing these assumptions the participant can gain a more integrated perspective (Mezirow, 1991). As participants transform their understanding and practices, they transform themselves and their relationships

with others (Bennett, Power, Thomson, Mason & Bartleet, 2016), which is a frame of reference that comprises of habits of mind and the resulting points of view (Cranton & Roy, 2003). Habits of mind are the general perspectives that people used to interpret the experience (Cranton & Roy, 2003).

Habits of mind are expressed as a point of view, that comprises of *meaning schemes* (Kitchenham, 2008). Meaning scheme is “the constellation of concept, belief, judgment, and feelings which shapes a particular interpretation” (Mezirow, 1994, p. 223) and are a “habitual, implicit rules for interpreting experience” (Mezirow, 2000, p. 2). Meaning schemes are sometimes outside of a participant’s awareness, but can be described in terms of what one sees and how one sees it (Kitchenham, 2008). Meaning schemes are realised through reflection. Reflection is also a key component in action learning where participants consider experience (Trehan & Rigg, 2012).

Transformative learning involves the transformation of underlying beliefs, values, biases, emotions, and assumptions which collectively are called *frames of references* (Mezirow, 1997). Frames of reference are explained by Mezirow (1997) as the way to understand experiences. Mezirow’s (2000, p. 16) later work included *perspective transformation* as overcoming problematic frames of reference, which “involves cognitive, affective, and conative dimensions. It selectively shapes and delimits perception, cognition, feelings and disposition by predisposing our intentions, expectations and purposes.” Illeris (2014) concluded that mostly academics in the field of transformative learning more or less agree that Mezirow’s original definition of transformative learning as meaning perspectives, frames of reference and habits of mind is inadequate. However, Illeris (2014, p. 573) also wrote that no other definition has taken its place hence his definition of “changes in the learners identify.”

### **2.8.2 Hoggan’s approach to transformative learning**

Hoggan’s (2016) approach is limited to the scope of literature of three journals that published the most articles on transformative learning: Journal of Transformative Education, Adult Education Quarterly and Adult Learning. Hoggan (2016) in his research chose to analyse each description of transformative outcomes in terms of the distinct ways in which the participant

changes (Hoggan, 2016). Hoggan's aim was to document the ways people change and provide understanding into the constraints that scholars should put in place to distinguish occurrences of transformative learning.

According to Hoggan (2016), Mezirow sanctioned a wide range of learning experiences under the broad umbrella of transformative learning. However, Hoggan (2016) felt that Mezirow did not provide boundaries to the phenomenon addressed his version of transformative learning theory. Therefore, Hoggan provided a typology of learning that addressed transformative learning outcomes. The typology of transformative learning provides a common language to discuss transformative learning outcomes by breaking the outcomes down into six broad categories: which include: worldview, self, epistemology, ontology, behaviour and capacity (Hoggan, 2016, pp. 65-69).

- **Worldview:** *Changes in worldview concern important changes in the way the participant understands the world and how it works. Worldview includes assumptions, beliefs, attitudes, expectations, ways of interpreting experience, new awareness/new understanding and gaining a more complex and comprehensive worldview.*
- **Self:** *Includes any way the participant feels a shift in their sense of self. This includes how the participant is situated in the world and how they relate to other people and the world. This can include a shift in identity, change in relationships, empowerment, sense of responsibility as they gain mastery over themselves, shift in the perceived purpose, self-knowledge around strengths, limitations and motivations. Self often includes "changes in the stories, narratives, and metaphors that learners use to form a coherent explanation of their lives" (Hoggan, 2016, p. 66).*
- **Epistemology:** *This is the participant's "beliefs about the definition of knowledge, how knowledge is constructed, how knowledge is evaluated, where knowledge resides, and how knowing occurs" (Hofer, 2002, p.4). Epistemology is displayed when the participants become more discriminating and engage in critical assessment of knowledge rather than a passive acceptance of knowledge or norms. The participant is often described as being more 'open' because they do not adhere to their current ways of making meaning.*
- **Ontology:** *This is how the participant exists in the world. This includes ways of being (the lived experience), personal attributes (such as trust and vulnerability) and the way a participant emotionally perceives their experience (emotions, feelings and quality of life).*
- **Behaviour:** *This is often seen as one of the key outcomes of transformative learning and links to Mezirow's (2000, p. 22) "planning a course of action, implementing one's plan's and building competence."*

*Mostly behaviour change is linked to actions consistent with new perspectives.*

- **Capacity:** *This is when the participant experiences changes in their ability such as cognitive development, or a shift in consciousness to create a greater level of awareness.*

These six outcomes of change in the typology of transformative learning are not stagnant and evolve over time. They provide a framework to review change and, in this present study, were applied to the design of the interview guide in the in-depth interview.

Hoggan's (2016, p. 70) typology represents change in the six categories that include sub-categories used to describe the broader categories (Table 2.3). These sub-categories are applied to address whether the learning was transformative. These sub-categories and categories of transformative learning that were applied to the analysis of the extent of individual transformative learning in this present study.

Table 2.3 Subcategories of learning outcomes

Six categories	Subcategories of learning outcomes
Worldview	Assumptions, beliefs, attitudes, expectations Ways of interpreting experience More comprehensive or complex worldview
Self	Self-in relation Empowerment/responsibility Identify/ view of self Self-knowledge Personal narratives Meaning/purpose Personality change
Epistemology	More discriminating Utilising extra-rational ways of knowing More open
Ontology	Affective experience of life Ways of being Attributes
Behaviour	Actions consistent with new perspective Social action

Six categories	Subcategories of learning outcomes
	Professional practices Skills
Capacity	Cognitive development Consciousness Spirituality

The search for literature on ways to evaluate transformative learning proved to be challenging as Cranton and Hoggan (2012, p. 527) concluded that the “literature is oddly silent on the issue of evaluation of transformative learning.” King’s (2005) Learning Activities Survey is a popular tool that is applied to many research settings however it lacks construct validity (Taylor & Snyder, 2010) and is not appropriate for this qualitative research, so was not chosen for this study.

Cranton and Hoggan (2012) conclude that the method that is mostly used to evaluate transformative learning is to conduct reflective interviews with participants and to search for themes that align with agreed upon definitions of the transformative process. Cranton and Hoggan (2012) suggest nine principles that could be used to determine if the learning is transformative, however Hoggan (2016) in his later research evaluates transformative learning by concluding that transformative learning outcomes include: breadth, relative stability and depth. It is precisely this criteria of breadth, relative stability and depth why Hoggan (2016) was chosen for this study as it enabled the researcher to understand the research sub-question on the extent of individual transformative learning. Breadth, relative stability and depth are important to take note of as they emphasise that transformative learning has taken place. Breadth is the number of contexts to which the learning is applied (Hoggan, 2016). Relative stability implies that the change is irreversible and that a certain amount of time has passed, hence the permanence of transformative learning (Hoggan, 2016). Depth is the impact of the change and the degree to which a particular outcome is affected (Hoggan, 2016). Depth can be associated with deep learning. Briggs (1991, p. 29) described deep learning as “...the task as interesting and personally involving, [focusing] on underlying meaning rather than the literal aspects, and [seeking] integration between components and with

other tasks.” In later references Briggs (2011) suggested that deep learning takes place when new learning connects with old (Briggs, 2011). Scoffham and Barnes (2009) explain that deep learning leads to increased self-confidence, improved self-esteem and a tendency to take action. Depth in learning is one of the important considerations as transformative learning involves a deep-seated paradigm shift, rather than a change within the existing paradigm (Palma & Pedrozo, 2016).

### **2.8.3 Sterling - deep learning**

In the search for literature on *deep learning*, Sterling’s model was one of the few that included levels of learning that could represent depth. Pang, Ho and Man (2009) in their research used Briggs’ (1987) concepts of surface learning, deep learning and achieving learning approaches. Their findings showed that participants demonstrated all three learning approaches took place. In this present study only the depth of learning was a consideration. In contrast Sterling’s (2010-2011) model includes three types of learning, namely; first-order change (efficiency and effectiveness), second-order change (doing things better) and third-order change (seeing things differently). The third-order change is where there is a paradigm change, and this is where transformative learning takes place as people’s perceptions of the world and their interaction with it are shaped. Sterling (2010-2011) describes transformative learning as seeing our worldview rather than seeing with our worldview. The case for transformative learning is that, “learning within paradigm does not change the paradigm, whereas learning that facilitates a fundamental recognition of paradigm and enables paradigmatic reconstruction is by definition transformative” (Sterling, 2010-2011, p. 23). Third-order change is dependent on a drastic shift of consciousness. This implies evaluating “the experience of seeing our worldview rather than seeing with our worldview so that we can be more open to and draw upon other views and possibilities” (Sterling, 2010–2011, p. 23). Sterling (2010-2011) describes transformative learning as seeing our worldview rather than seeing with our worldview. The case for transformative learning is that, “learning within paradigm does not change the paradigm, whereas learning that facilitates a fundamental recognition of paradigm and enables paradigmatic reconstruction is by definition

transformative” (Sterling, 2010-2011, p. 23). Sterling’s (2010-2011) model was chosen as it addresses the levels and types of learning thus it helps address the research sub question on the extent of transformative learning. Table 2.4 is a summary of Sterling’s levels and types of learning.

Table 2.4 Levels of learning

<b>Sterling’s (2010-2011) types of learning</b>
First order change – effectiveness/efficiency which can be labelled as doing things better.
Second order change – examining and changing assumptions which can be labelled as doing better things.
Third order change – paradigm change which can be labelled as seeing things differently and is hence transformative.

In Sterling’s model (2010-2011) it can be argued that second order change can be transformative if the outcomes meet Hoggan’s (2016) criteria of breadth and relative stability.

## **2.9 THE START OF INDIVIDUAL TRANSFORMATIVE LEARNING IN BDAL**

There is disagreement on the way transformative learning starts. Certain authors (Baumgartner, 2002; Mezirow, 1981) see transformation starting with a disorienting dilemma whereas other authors posit that transformative learning may begin unnoticed (Kovan & Dirkx, 2003; Nohl, 2015). It has also been argued that transformative learning may be gradual, incremental and cumulative (Mezirow, 1997; Taylor & Cranton, 2012). Regardless of differences in the approaches of transformative learning, all involve transformation of what Mezirow (1991; 2000; 2003) calls a meaning perspective. This means that learning is not purely “informational” (Kegan, 2000, p. 48) as it confronts prior ways of “thinking, feeling, or acting and results in thought, commitment and action” (Dix, 2016, p. 140). Theories that impact on transformative learning are *moments of insight* and *liminal spaces*.

### **2.9.1 Moments of insight**

Individual participants can learn when they experience a challenging learning experience, as it includes “the unexpected, high stakes, complexity, pressure and novelty” (McCall, 2010, p. 4). During a challenging learning experience,

participants can feel deep shifts in perspective during which they may suddenly see themselves and the world from a different perspective – this can be called *an epiphany* (Denzin, 1989), *turning points* (Pillemer, 1998), *critical moments* (Bedeian, 2007; De Haan, 2008; Giordano, 2004), *sacred learning moments* (Tissdell, 2008), *aha moments* (Longhurst, 2006) and *gaining insight* (Topolinski & Reber, 2010). As part of the reflection process during BDAL the action learning facilitator in the sample from this present study uses the word *aha moments* when they reflect with the participants in the set. In addition the researcher used the word aha moments as one of the interview questions. De Haan, Bertie, Day and Longhurst (2006, p. 63) views an “aha moment” as a conscious experience of the individual, which leads to an understanding of oneself or identifying a solution to a problem. Longhurst’s (2006) definition of *aha moments* is profoundly different from insights of a problem solving, purely cognitive nature. *Aha moments* are the crucial means by which participants can achieve transformative learning rather than just a behavioural change (Longhurst, 2006). Sills (2010, p. 609) describe this *aha moment* as being “significant, urgent, exciting or disturbing.”

Learning that causes a pivotal change most often begins with an *aha moment* which functions as a trigger for change (Henderson & Bastnagel cited in Denmark & Paludi, 2018). However, an *aha moment* only results in change if participants take time to reflect on it before it can result in a change of thinking (Henderson & Bastnagel cited in Denmark & Paludi, 2018). Sometimes learning will result in a small change, but can also result in transformative learning (Mezirow, 1991). Transformation can take place incrementally or abruptly in the form of a simple transformation or a radical transformation of perspective (Merriam, Caffarella & Baumgartner, 2007).

Moments of insight are specific and identifiable moments that are transformative for the participant (Giordano, 2004). There are contrasting views regarding when a moment of insight can take place. Wilber (1989) takes a developmental theorist view and describes moments of insight as more gradual, staged affairs and Giordano (2004) asserts that insights are personal, rare and require time before the participant recognises their significance. In contrast, the experience of moments of insight can include suddenness, where the solution of the

problem bursts into mind suddenly and surprisingly and can be seen as a turning point for learning (Bedeian, 2007; Topolinski & Reber, 2010).

Research has examined insight from a brain process (Kounios & Beeman, 2009; Metcalfe & Wiebe, 1987), however there is little phenomenological explanation from an experience view of insight (Topolinski & Reber, 2010), especially insight gained during a management development programme. Orum (2003, p. 387) wrote, “as a phenomenon, moments of insight are fascinating, highly generative of theory and worthy of more research.”

### **2.9.2 Liminal space and threshold concepts**

The idea of *liminal space* has remained relatively unclear in literature (Land, Rattray & Vivian, 2014). Land et al. (2014, p. 199) see liminal space as a “transformative state in the process of learning in which there is a reformulation of the learner’s meaning frame and an accompanying shift in the learner’s ontology or subjectivity”. The Latin word ‘limen’ means “threshold” (Meyer & Land, 2005, p. 12). The term “threshold concept” is used to describe liminal space as it is a state “akin to a portal, opening up a new and previously inaccessible way of thinking about something” (Meyer & Land, 2005, p. 1). The reason to consider liminal space is that the participant could be in a state of transformation during BDAL and it is this liminal space that might precede individual transformative learning.

These threshold concepts are often disturbing for the participant, as they require a letting go of customary ways of seeing things that are familiar for them (Land et al., 2014). Threshold concepts aggravate a state of *liminality*, which is a space of transformation in which the transition from an initial understanding (or practice) to that which is needed is achieved (Land et al., 2014). *Liminality* occurs when the participant has left behind their previous self but has not yet become their new self, which results in a feeling of lack of progress (Kiley, 2015). The insights gained when the participant is in a state of *liminality* can be unsettling and can involve a sense of loss, as noted by Palmer (2001, p. 4):

*The truth or insight may be a pleasant awakening or rob one of an illusion; the understanding itself is morally neutral. The quicksilver flash of insight may make one rich or poor in an instant.*

An addition to *liminality* there is also the theory of being stuck or *stuckness* (Halstead, 1998). Halstead's (1998) view is that *stuckness* occurs when the participant believes that what they are doing is right and that any other course of action is wrong. Consequently, when the solution fails, instead of trying a whole new strategy, the participant tries more of the same thing. An additional consequence of *stuckness* is a lack of self-awareness, as participants sometimes do not see the cycles in which they are stuck. Kahneman (2013) calls this being "blind to our own blindness". Vince (2008) confirms that participants can experience *stuckness*, avoidance or learning inaction and that some form of intervention is necessary. *Stuckness* occurs when participants have a self-confirming belief and use their intuition and pre-programming rather than analysis (Craig & Kohl, 2014).

Even though moments of *stuckness* are upsetting, they are described as jewels because of the opportunity they provide for participants to gain crucial understanding about themselves (Land et al., 2014). However, even though it may be describe as a jewel this feeling of being stuck could be a barrier to "gaining that elusive light bulb moment" (Kiley, 2015, p. 53) .

## **2.10 TRANSFORMATIVE LEARNING CRITICAL SUCCESS FACTORS IN BDAL**

This section summarises the literature on individual transformative learning critical success factors in BDAL and includes: conducive learning environment, cognitive level of the participant, reflective practice including hand-drawn images and reflective discourse.

### **2.10.1 Conducive learning environment**

Participants in this present study work on their BDAL business challenge throughout workshops as well as during their own time. It is therefore essential that an environment that encourages openness is created so that transformative learning can take place (Taylor, 1998; 2009). Baumgartner (2001) and Lam and O'Neil (2000) revert back to Mezirow's work around the ideal conditions for transformative learning in a classroom. One of these conditions that are relevant to BDAL is the need for a safe and open environment (Robertson & Bell, 2017), where action learning facilitators

relinquish their authority or positional power, which encourages participation and reflection (Baumgartner, 2001). Individuals working in a BDAL set need an open, trusting, and supportive environment for transformative learning to take place (Lamm, 2000). If the learning environment in BDAL is one of trust and safety, group ownership and individual agency takes place, which sets the scene for individual transformative learning (Ajoku, 2015; Taylor, 2000). Certain learning approaches, such as BDAL, where individuals work in a set can create an environment for transformative learning. Mezirow (1990) mentions that a social situation can create an environment for transformative learning. Ruane (2016) in research discovered that the transformation of participants was evident through changed behaviours and changed points of view. She noted that transformation was not easy to come by, and in some instances, she had to dig very deep to bring it to the forefront. The set contributes to individual transformative learning; however, this assumes that participants decrease their need for control within a social setting (Raelin & Raelin, 2006). Gilly (2004) emphasised building trusting relationships, where individuals move into a group identity which is supported by personal knowledge and this can only take place if there is transformation of the self.

Resistance to perspective transformation can take place, even among participants who are motivated to learn (Illeris, 2003). Transformation can create anxiety, which makes both the safety of information (Edmondson, 1999; Mezirow, 1991) and an interdependent relationship built on trust, important considerations in learning (Taylor, 2000). Kolb and Kolb (2005) recommend that safety can be increased and anxiety decreased through social attachment, respecting differing experiences and linking challenge and support. Social attachment is in itself a paradox as it is the very social attachment that can create safety but also add additional anxiety due to tensions in the set, hence the paradox of BDAL being safe in an unsafe environment (Robertson & Bell, 2017). Rigg and Trehan (2004) conclude that conflicts, contradictions, emotions and power undercurrents inevitably exist within a team of peers no matter which approach is taken towards learning.

To create a transformative learning environment within BDAL the action learning facilitator could follow Taylor's (2000. p. 313) suggestions of being

“trusting, empathetic, caring, authentic, sincere, and demonstrative of high integrity.” In addition, the coach needs to give the set immediate and helpful feedback on group dynamics so that participation and collaboration is encouraged, alternative perspectives explored and problem solving takes place (Taylor, 1998). Furthermore, participants can engage in journal writing as part of reflection to encourage transformative learning (Cranton, 2002).

### **2.10.2 Cognitive level of the participant**

There are claims in favour of transformative learning being more applicable to participants who are already at a mature and high level of cognitive functioning. Merriam (2004) maintains that transformative learning aims to develop a high level of thinking and it can be argued that in order to achieve this in the first place, a certain level of cognitive development is required. In support of this, Mezirow (1998b) claims that in order for participants to critically self-reflect on their own assumptions, a critique of a premise upon which the learner has defined a problem is required, and this demands an advanced level of cognitive development.

Furthermore, to be able to participate in reflective discourse where participants would have to look at alternative perspectives shows mature cognitive development. This implies that if the aim is to promote transformative learning outcomes as a result of BDAL, then action learning is not suited to all participants as a form of management development.

### **2.10.3 Reflective practice**

The terms ‘critical self-reflection’ and ‘reflection’ are used interchangeably in the literature on transformative learning (Newman, 2014). Reflection is essential for transformative learning to take place (Brookfield, 1995; Brookfield & Preskill, 1999; Cranton, 2006; Gravett, 2001; Mezirow, 1991). “Effective learning does not follow from a positive experience but from effective reflection” (Criticos, 1993, p. 162). Learning in the context of transformative learning is the meaning-making practice which occurs through the re-interpreting of previous experiences which takes place when the participant is involved in reflection (Mezirow, 1991). Reflection involves the “manipulation of meaning” hence the link to transformative learning (Moon, 1999, p. 161).

It is not only reflection itself, but deep reflection that denotes the foundation of transformative learning (McGregor, 2012). Mezirow (1991, p. 6) refers to “reflective learning” which relates to trying out assumptions where beliefs restrict an individual’s growth. This presents an opportunity to break habits and to embrace new ways of thinking and doing. Palmer, Burns and Bulman (1994, p. 13) describe reflection as being:

*initiated by an awareness of uncomfortable feelings and thoughts which arise from a realisation that the knowledge one was applying in a situation was not itself sufficient to explain what was happening in that unique situation..... reflection therefore has the potential to address the problems of practice in a way that the application of technical rational approaches alone do not.*

There is a link to Revans’ (1983) equation, Learning = Programme knowledge + Questions, as it is the reflective process of questioning that challenges what is currently known about the business challenge during action learning. Argyris and Schön (1996, p. 16) concluded that inquiry into an organisational problem, in this case, the BDAL business challenge, is essential to the discovery of mismatches between “expected and actual results of action.” The discovery between the expected and the actual create feedback loops, which have the potential to lead to individual learning.

#### **2.10.4 Reflective discourse in transformative learning**

Transformative learning employs “reflective discourse” (Feinstein, 2004, p. 109) to create learning. Reflective discourse is the use of dialogue to find “a common understanding and assessment of the justification of an interpretation or belief” (Mezirow, 2001, p. 10). Reflective discourse takes place during dialogue to find a common understanding and valuation of the belief (Mezirow, 2000). Without reflective discourse, it is doubtful that an act of learning will be truly transformative (Feinstein, 2004).

Sometimes reflective discourse creates a certain level of anxiety, emphasising that transformative learning is not an easy process to arrive at (Schein, 2004). Mezirow (1985, p. 24) supported Schein’s point when he wrote that transformation can be “epochal . . . [and] .. painful” as it involves a comprehensive and critical re-evaluation of oneself. The participant can feel discomfort, difficulty and sometimes excitement. This crisis means that

transformative learning is a felt experience by the participant and can be traumatic and inspiring as mental models undergo radical change (Sterling & Baines, 2002). Ison and Stowell (2000) suggest that participants experience chaos, confusion and feeling overwhelmed by complexity before new conceptual information brings about an unplanned restructuring of mental models at a higher level of complexity, thereby allowing participants to understand concepts that were obscure (Ison & Stowell, 2000).

In research conducted by Ajoku's (2015), it was noticed that being able to admit discomfort when changing existing frames of reference during action learning resulted in some changes or growth towards transformative change. Ajoku (2015) recognised that when participants take a learning path that is less judgemental and more inclusive, the prospect of experiencing transformative learning is enhanced. She noted that there can be challenges in terms of participants' ability to participate effectively in reflective discourse as they have preconceptions that restrict their ability to learn and this leads towards the path of non-transformative learning (Ajoku, 2015).

#### **2.10.5 Benefits of transformative learning in management development programmes**

Transformative learning in the field of adult, higher and continuing education continues to be well researched (Taylor, 2007). The *Journal Adult Education Quarterly* listed the most cited articles in March 2014 and Mezirow's transformative learning was cited in the top ten. Nevertheless the value and benefits of introducing transformative learning theory in management education has only begun to be appreciated and the literature is thin (Kuechler & Stedham, 2018).

The term *transformative learning* has greatly added to the field of adult learning and its relationship to personal change (Dirkx, 2006; Mezirow, 2003; Taylor, 2009). The value of transformative learning in a management development programme is that participants attending the programme have the opportunity for "independent thought" (Christie, Carey, Robertson & Grainger, 2015, p. 22) and a management development programme can encourage participants to break-out of established ways of thinking (Sharpe, 2016). Independent thought

can help participants to evaluate their own thought processes and the “fields that shape them” (Christie, Carey, Robertson & Grainger, 2015, p. 22). In addition, a management development programme designed using transformative learning theory can help participants achieve change in behaviour (Petriglieri, Wood & Petriglieri, 2011) and so doing support participants to adapt to the changing organisational landscape. Leadership, ethics, strategic management and communication are topics in a management development programme that can create openness to worldviews (Raelin, 2007). A key benefit of introducing transformative learning theory, specifically critical reflection, into a management development programme is that it creates the opportunity for different perspectives to arise (Closs & Antonello, 2011).

## **2.11 THE INTERGRATION BETWEEN ACTION LEARNING AND TRANSFORMATIVE LEARNING**

To the researcher’s knowledge, there are very few articles that integrate action learning and transformative learning. The three key articles that link the two constructs were written by Ajoku (2015), Dilworth and Willis (1999), and Ruane (2016). There is limited literature on integrating action learning and transformative learning and within a BDAL context transformative learning is not well specified. Ajoku (2015) believes that there is a developed awareness regarding links between action learning and transformative learning. Ajoku (2015, p. 5) concluded that both action learning and transformative learning create change, however “where there is more opportunity for a transformative or transformational approach, there is an increased likelihood of an entire shift in viewpoint. O’Neil and Marsick (2014) conclude from their research that action learning facilitators can enable a process that helps with critical thinking towards transformative learning so that participants can start to deal with the rapidly changing environment.

Thus, exploring the option of a transformation during such reframing would be worthwhile.”

Ruane’s (2016) researched participants’ stories regarding their experiences on accredited postgraduate executive programmes underpinned by an action learning philosophy. She found that common themes in all three of the

participants' stories were those of "personal transformation, transformations evidenced through changed behaviours and changed points of view, transformations which were not easy to come by, and in some instances, were the result of digging very deep" (Ruane, 2016, p. 279). Her research found that participants who were supported by close bonds in the set, allowed for truthful revelations and this made transformation possible. In Lamm's (2000) research, transformative learning occurred in the areas of self-understanding, inclusiveness and reflective action. Moreover, evidence of change was seen in human qualities namely, empathy, humility, tolerance and patience.

Dilworth (1998, p. 29) suggested that action learning is used for "organization development, management development, team building, and transformative learning." The aim of using transformative components during action learning sessions is to encourage individual learning, enhance skills and engage in adult learning (Ajoku, 2015). Despite the suggestions in literature that transformative learning results from action learning, there is very little know about integrating action learning, especially BDAL, and transformative learning.

Learning that leads to behavioural change can be seen in action learning (Craig & Kohl, 2014); however, this does not necessarily mean that the change is transformative. Individual participants may well learn in a BDAL management development programme, but this learning may not necessarily be transformative as not all learning is transformative (Eyler & Giles, 1999).

Ajoku (2015) supports that transformative learning is individually focused and can be applied to action learning programmes. Carey, Robertson and Grainger (2015) emphasize that transformative learning has the potential to add value to other types of learning, but they do not specify the types of learning only that transformative learning enables the participant to re-assess their learning and apply what they have learnt.

There has been an increased appreciation regarding associations between action learning and transformative learning which were observed in research conducted by Ajoku (2015), where she concluded that action learning has the potential to create deeper learning opportunities. This was confirmed by Trehan and Pedler (2011) who confirm that the application of action learning navigates

a spectrum from performativity (giving priority to achieving business results through problem-resolution) through to transformative learning (emphasising radical personal and/or organisational change). Vince, Abbey, Langenhoven, and Bell (2017) link action learning and transformative learning by confirming that action learning has transformative potential. However additional research is required to create an understanding on the integration of the two constructs.

Transformative learning and action learning have two different outcomes in a management development programme context. The outcome of action learning is to increase the speed of learning, solve complex problems and develop learning at the individual, group and organisational level. Action learning implementation includes “proximal (e.g. timelines and the balance of action and learning)” and “distal outcomes (for example, learning and performance)” (Bong, et al., 2014, p. 282). In comparison, transformative learning has totally different outcomes that include the state of being transformed in terms of an individual’s perceptual and conceptual “meaning perspectives” (Cope, 2003). The outcome of transformative learning includes transforming the individual’s perspectives (Cope, 2003). O’Neil and Marsick (2007) see the outcomes of transformative learning as the change in knowledge, insight, understanding, meaning, attitudes, competencies and behaviours that take place.

Both transformative learning and action learning apply reflection and dialogue as part of their learning process. What makes reflection in action learning so beneficial is that it improves the depth of individual learning to support development of self-insight and growth (Trehan & Rigg, 2012). Development of self is one of Hoggan’s (2016) typologies of transformative learning.

It can, therefore, be argued that introducing transformative elements helps to expand the potential integration between aspects of action learning and transformative learning (Ajoku, 2015). Action learning can involve the reinterpretation of ideas, whereas transformative learning has more impact as ideas are entirely reframed and changed (Ajoku, 2015).

Despite the relative scarcity of work integrating BDAL and transformative learning there would appear to be a relationship between the two constructs as they both promote change. In conclusion, there is a gap in understanding how

BDAL can facilitate individual transformative learning. It can be argued that BDAL in a management development context can be designed and facilitated to specifically facilitate individual transformative learning.

## **2.12 SUMMARY**

This present study may benefit participants who work on BDAL in a management development programme, learning institutions that provide these programmes, sponsoring organisations that send their participants on the programmes and the action learning facilitators who work on these programmes. BDAL is valuable to management development as the outcomes of BDAL include individual development and recommendations on the business challenge. However there is scope to supplement the theory on BDAL outcomes, as it is not clear what is meant by *individual development* in the literature. Transformative learning is implied in BDAL but there is little discussion regarding this in the literature. Transformative learning is necessary in management development programmes, as participants need to be open to new ways of adapting to the changing organisational landscape.

There is little research on BDAL specifically, however this present study answers the call of exploring thoughtful variations of action learning and modifying the action learning practice accordingly (Pedler, Burgoyne & Brook, 2005). In addition Ajoku (2015) concludes that there is scope to explore the boundaries between action learning and transformative learning (Ajoku, 2015).

This chapter included a detailed introduction on learning and unlearning in a management development context. Thereafter, it analysed two types of learning, firstly, action learning with a focus on BDAL and secondly, transformative learning. The critical success factors of both types of learning were discussed, especially reflective practice that applies to both types of learning. Both learning approaches deal with change, but there is the potential for BDAL to contribute to both the organisation in the form of solving the business challenge and individual learning should a transformative component be emphasised in the design of the BDAL. Connections were made between ideas and concepts that enabled deeper thinking on the topic. From the literature review, it can be concluded that there is a dearth of literature on

BDAL, limited literature on the connection between BDAL and transformative learning even though transformative learning is implied during BDAL. The aim of BDAL is to deliver on individual, team and organisational learning. Despite this, there is a lack of understanding on individual transformative learning as a result of BDAL and it is precisely this gap that provides the impetus for this present study.

## CHAPTER THREE: RESEARCH METHODOLOGY

### 3.1. INTRODUCTION

This chapter outlines the research methodology that guided the research process. The methodology is influenced by the ontology and epistemology of the research. Qualitative research was chosen and narrative inquiry as it aligned to the research philosophy, research aim and research questions. To guide the reader the research aim was to explore how (if at all) individual transformative learning could be embedded into a BDAL framework. The main research question which guided this present study was: How should a BDAL framework be designed to facilitate individual transformative learning during a management development programme?

In this chapter the research setup is clarified and then the five phases of research that were use are explained. Table 3.1 is a summary of each research phase, sample, year data was gathered, method of data gathering, purpose of the data and analysis of data. Table 3.1 illustrates that narrative research uses a number of research approaches, samples and methods (Lieblich, Mashiach-Tuval & Zilber, 1998).

Table 3.1 The five research phases, sample, year, methods of data gathering, purpose of the data and analysis of the data.

Phase	Sample – different participant for each Phase.	Year of management development programme and year data was collected	Methods of data gathering	Purpose of data and analysis of data
One: Exploring	Six participants	2015	<b>In-depth interview.</b>  Pilot research (Baker, 1994).	Testing interview questions.  Data not analysed.
Two: Understanding	Three participants	2015	<b>Hand-drawn images.</b>  <b>In-depth interview.</b>	Adding the drawing of images to determine whether the participants were able to articulate their

Phase	Sample – different participant for each Phase.	Year of management development programme and year data was collected	Methods of data gathering	Purpose of data and analysis of data
			Pilot research to try out a particular research instrument (Baker, 1994).	learning in an interview. Data not analysed.
Three: Meaning	16 participants	2016	<b>Draw-write-tell</b> (Angell, Alexander & Hunt, 2013).	Part one data analysis: Interview Transcript to interpretive story using McCormack's (2000a; 2000b) lenses.  The level of transformative learning was also noted.  Part two data analysis: Thematic analysis of interpretive stories to produce themes (Braun & Clarke, 2006).
Four: Responding	Nine participants:	2017	Crystallisation (Richardson, 1994). Sent via email	To gain additional voices. Similarities and differences in the experience between Phase 3 and Phase 4 were noted. The level of transformative learning was also noted.  Thematic analysis of emails to produce themes (Braun & Clarke, 2006).

Phase	Sample – different participant for each Phase.	Year of management development programme and year data was collected	Methods of data gathering	Purpose of data and analysis of data
Five: Reacting	Six action learning facilitators. Eight participants	2017 2018	Crystallisation (Richardson, 1994). Sent via email. Sent via email	Action learning facilitator's feedback on the initial conceptual framework. Participant's feedback on the use of interpretive stories.

The five phases in this present study include: Phases One (exploring) and Two (understanding) which were pilot studies. Phase Three (meaning) involved narrative enquiry employing hand-drawn images and in-depth interviews (called the draw-write-tell method). Phase Four (responding) was part of crystallisation as additional views were added to the research. Phase Five (reactions) included feedback on the new conceptual framework from action learning facilitators and participants gave feedback on the use of interpretive stories. These five phases emerged as the research took place following a pragmatic approach.

Each of the five phases are explored in detail in this chapter. In addition a section on quality of the research to show what extent a rigours approach was applied and the chapter ends with the researchers reflection on the methodology.

### 3.2 RESEARCH PHILOSOPHY

There are many definitions of research, but the Cambridge English Dictionary (2018) describes the term *research* as an exploration of a subject in order to discover new information or reach new understandings. What is important to establish is the way the researcher understands the world, which is based on how they view the world (Cohen, Manion & Morrison, 2007). This section interprets the researcher's view on reality as it describes the ontological assumptions, which lead to the epistemological assumptions that guide the methodological considerations (Hitchcock & Hughes, 1995).

It has been recommended that philosophical underpinnings be directed by the research questions (Creswell & Plano, 2011) and this informs the research design (Easterby-Smith, et al., 2002). Management development is proliferated with a range of theories (Ram, 2012) with action learning (including BDAL) and transformative learning being only two of them. There are few studies that explicitly address the philosophical underpinnings of either.

What makes it confusing when discussing research philosophy is that there are various terms used in the literature (Schwandt, 2007). Research paradigms can be seen as the philosophical beliefs which are applied to understanding knowledge (Mertens, 2005) in three perspectives: namely ontology, epistemology and methodology (Taylor & Mertens, 2013). This chapter will address all three perspectives, including ethics..

### **Ontology**

Ontology is the way the researcher views the world (Ram, 2012). In previous research on action learning the ontology is not clear, as Ram (2012, p. 221) confirms “ontological commitments are few and far between” in action learning research. To ensure that this present study clarifies ontology it addresses the researcher’s view of the world. This present study takes a view that no one participant or researcher’s view is a true reflection of reality as there are multiple realities. Easterby-Smith, et al. (2015) call the ontology of multiple truths and realities a relativist perspective. The relativist perspective was deemed appropriate for this present study, as there is no one single objective truth regarding individual transformative learning within BDAL as reality is subjective.

### **Epistemology**

Epistemology asks how do we know the world? (Denzin & Lincoln, 1994). The epistemology in this present study is one of multiple realities which is determined by a participant’s and researcher’s culture and societal values which are socially constructed (Gergen, 2015). This present study takes a social constructivist approach where the participants do not discover knowledge so much as construct or make it and as they have new experiences they modify their constructions (Schwandt, 2007). This social constructivist approach aims to understand and interpret the individual transformative learning experience

from the point of view of participants who have been part of BDAL in a management development context. The reason for conducting the research in a social constructivist philosophy is to understand and describe human nature (Chilisa, 2011). Participants, together with the researcher, co-create the interpretive stories using McCormack's (2016) lenses as part of a narrative inquiry approach, which results in creating multiple truths. In this study, the researcher together with the participant draws conclusions from the interpretation of the individual's experience during BDAL. The epistemology is socially constructed through language and this language is one of the key lenses that is viewed during McCormack's (2016) interpretive stories.

### **Axiology – ethics**

In order to maintain the integrity of the research, ethical considerations were considered. Maintaining an ethical stance is difficult, frustrating, emotionally draining and on the face of it, can seem out of reach (McCormack, 1995), but that does not mean researchers must stop trying to apply ethical standards when writing stories. When the researcher is uncomfortable when conducting a narrative inquiry approach, this may be seen as guarding them from going too far (Josselson, 1996). Clandinin and Connelly (2000, p. 170) wrote, "ethical considerations are never too far from the heart of our inquiries no matter where we are in the inquiry process."

Epistemology, ontology and axiology (ethics) need to be considered in research choices (Ilhuh & Eaton, 2013; Mertens, 1998). The researcher constantly reflected on and considered the following:

- Participants on a BDAL informed management development programme were given the choice to volunteer to be part of this present study.
- Participants were given a pseudonym in the interpretative stories.
- Action learning facilitators were not named.
- Informed consent was obtained from the three sponsoring organisations.
- Ethical clearance was attained from the university.

### **3.3 RESEARCH METHODOLOGY: QUALITATIVE RESEARCH USING NARRATIVE INQUIRY**

It can be argued that research on management development should include qualitative research such as narrative inquiry. Narrative inquiry involves an interest in lived experiences as narrated by those who live them (Chase cited in Denzin & Lincoln, 2011). How the researcher conducted the qualitative research was based on beliefs about the nature of the social world and the nature of knowledge, which was summarised in the research philosophy of constructivism. This present study lends itself towards qualitative research as it meets Bogan and Biklen's (1998, p. 29-33) five features of qualitative research: research has the natural setting as the direct source of data, research is descriptive, researchers are concerned with the process, data is analysed inductively and 'meaning' is of a concern. In qualitative research, knowledge can come from the researcher or a participant's interpretations of information instead of through statistical analyses of causal relationships (Horn, 2004). This means that in qualitative research the theory emerges from the collected data (Horn, 2004).

It is suggested that a qualitative approach is applied to management development research due to its complexity (Cohen, et al., 2007), making a qualitative approach relevant for this present study. Management development research involves context and enormous complexities (Berliner, 2002) as it is an "analytical practice that focuses on the process required to produce a valid explanation of educational phenomena" (Bulterman-Bos, 2008, p. 413).

This present study methodology section includes interpreting the expression 'lived experience', narrative inquiry and the relationship between the researcher and the participant. The terms 'narrative inquiry' and 'narrative research' are used interchangeably in the literature (Clandinin, 2007). The term 'narrative inquiry' is applied here as it involves the research of experience as a story, but it is mainly a way of thinking about an experience (Connelly & Clandinin, 2006). Narrative inquirers concur that narrative inquiry is the research of experience (Clandinin, 2006; Pinnegar, Danes & Gary, 2007; Thomas, 2012).

### 3.3.1 Interpreting lived experience

Experience is clearly a complex, constructed reality as it concerns the processes, which include feelings, perceptions and memories as they occur from moment to moment (Jourard, 1971). The expression 'lived experience' or *Erlebnis* in German is borrowed from philosophical German. Stories about experience are normally stories that participants keep to themselves (Grumet, 1991), as a lived experience is not something that is apparent (Dilthey, 1985). Dilthey highlighted the importance of understanding or *verstehen* in German in social research and the emphasis on lived experiences to see the context in which certain actions take place (Ritchie & Lewis, 2003). In this sense, then, lived experience is personal (Gadamer, 1975). Schutz (1967) argues; however, that meaning does not lie in the experience. Rather, those experiences are only deemed fully meaningful when they are grasped reflectively. In the context of this present study, lived experience can, therefore, only be fully recognised once the BDAL project has been completed and the participants have had time to reflect on their learning.

Memory is an essential entity in narratives as it enables the construction of the narrative. Hinchman and Hinchman (1997) describe memory as the home of narratives. "What counts as a lived experience ... is meant as a unity [and] constitutes itself in memory" (Gadamer, 1975, p. 60). We could say that memory could impact on the recollection of the lived experience and the participant could struggle with finding the lexicon to articulate their lived experience was overcome by the decision to apply hand-drawn images as a research method. It should be noted that experience is not a transparent window on the participant's world (Braun & Clarke, 2006), and it is difficult to articulate learning.

### 3.3.2 Narrative inquiry

People shape their daily lives by stories of who they and others are and how they interpret their past in terms of these stories. Story, in the current idiom, is a portal through which a person enters the world and by which their experience of the world is interpreted and made personally meaningful (Connelly & Clandinin, 2006). Narrative inquiry investigates what happened, the importance of that and

how it is conveyed (Thomas, 2012). The essence of narrative inquiry is a "constellation of stories" (Craig, 2009, p. 604) that includes a thick description of events (Clandinin, 2007). Polkinghorne (2007) writes that narrative inquiry confirms how people understand others and themselves. It is through narratives that the world is viewed and understood (Bruner, 1986; Clandinin & Connelly 2000; Coles 1989; Wortham, 2001). Narrative inquiry reveals the meaning of the participants' experiences, as opposed to objective truths (Bailey & Tilley, 2002).

Narrative inquiry was the choice of qualitative methodology in this present study to allow the researcher to study participants lived experience of BDAL (Clandinin & Huber, 2002) as human experience can be expressed as a storied life. Atkinson (cited in Clandinin, 2007, p. 224) wrote that "*we are the storytelling species. Storytelling is in our blood. We think in story form, speak in story form, and bring meaning to our lives through story.*" Narrative inquiry benefits those involved in management development as it helps to understand the depth and richness of learning and change, which can occur because of adopting an action learning approach (Ruane, 2016).

Educational experiences, including management development experiences, ought to be studied narratively (Clandinin & Connelly, 2000), as participants are storytelling organisms who lead storied lives both individually and socially. In addition, narrative inquiry is a methodology that has an extended academic history both in and out of education (Connelly & Clandinin, 1990) therefore meeting the context of this present study. Narrative inquiry as a research methodology brings, "theoretical ideas about the nature of human life as lived to bear on educational experience as lived" (Connelly & Clandinin, 1990, p. 3). Ruane (2018) in her PhD on participants' learning experiences on a postgraduate executive action learning programme also applied a narrative inquiry.

Time and context are what distinguishes narrative inquiry from other forms of qualitative research (Simms, 2003). Ricoeur (in Simms, 2003) calls this the 'threefold present' where the past, present and future co-exist in the current story. How time potentially transforms the interpretation is fundamental to the construction of narratives in this present study, as there may have been a significant gap in time for the participant between the BDAL experience and the

drawing of the image prior to the in-depth interview. This significant gap of time is important to meet one of Hoggan's (2016) criterion of relative stability of transformative learning.

In this present study, narratives are an entry point for examining research sub-question one (Q1): To what extent did participants experience individual transformative learning during BDAL? Participants who have had a BDAL experience have important stories to tell. Most importantly, there is a call to research stories from an action learning experience. Ruane (2016) concluded that there is lack of clarity in literature of participants' stories concerning their experiences during programmes that include action learning.

### **3.3.3 The relationship between researcher and participant**

The participant and the research play a significant role in qualitative research as both contribute to the data. In this present study, the relationship between the researcher and the participant influences the storytelling through the level of collaboration (Bell, 2009; Chase, 2010; Riessman, 2008). The researcher is not separate from the participant in narrative inquiry, as the narrative inquiry process requires a joint construction of the story as it involves a relationship between the researcher and participants (Clandinin & Connelly, 2000; Ellis & Bohner, 2000).

In this present study, the researcher becomes part of the story as the researcher co-writes the narrative with the participant in the form of an interpretive story. The narrator, who is the participant in the research, chooses what to share, what to limit, what to emphasise and the listener, who is the researcher, chooses what to hear, include and structure the final written story, called the interpretive story. It is virtually impossible for the researcher to be separate from the narrative inquiry.

A kaleidoscope of understanding will be the end result (De Cock, 1998), all of which are deemed true at that particular time and situation: "Who we take ourselves to be at any one point in time depends on the available storylines" (Davies, 1993, p. 4). This means that the research requires a tolerance for paradox and ambiguity, as stories are characterised by multiple voices, perspectives, truths and meanings.

### 3.4 RESEARCH SET-UP

The research set-up includes the particular details of this present study and provides context to the senior management development programme (SMDP) and the BDAL set. The population for this present study included three senior management development programmes, for three different sponsoring organisations. The BDAL philosophy applied to these management development programmes was based on Boshyk's (2014) component parts, as well as meeting the sponsoring organisation specific expectations as the management development programmes are customised to meet organisational needs.

Each management development programme includes a number of study schools (which contain a number of workshops) facilitated by teaching faculty. The study schools design included time for the participants to discuss their BDAL business challenge, reflect on the learning as well as attend workshops. The BDAL challenge was an existing and real problem within their organisation. The focus of each study school was on learning, as opposed to teaching. Modules were assessed by assignments that focused on application of learning and theory.. An action learning facilitator supported the sets in understanding the BDAL philosophy and the challenges in working in a set. The set worked on the business challenge for the duration of the whole management development programme, each set defined how long they were to meet and how many times. Sets then presented the final recommendations to a panel of line managers and faculty who work on the management development programme and if the recommendations were accepted then action was taken on the recommendations back in the workplace (Appendix 1).

The practice of BDAL in these management development programmes related directly to Alpha, Beta and Gamma systems (O'Neil & Marsick, 2007). The participants used the Alpha system by analysing the external environment, internal resources and the managerial value system. The Beta system was applied when internal and external surveys and interviews were conducted. During the process, participants took time to reflect on themselves, the set and the business challenge, with the help of the action learning facilitator, hence applying the Gamma system.

The action learning facilitator does not sit in on set meetings where the participants question the business challenge amongst themselves or with stakeholders in the organisation. The action learning facilitator is not considered part of the set; their role is a learning facilitation role. The role of the action learning facilitator, who works for the learning institution is important in this context as he/she builds relationships with the participants and the sponsoring organisation, helps the set define strategic business issues and holds discussions on personal growth (Allen, et al., 1997; Hargrove, 2003).

As in other action learning programmes, the senior management development programmes in this present study cannot be termed pure BDAL; it can be argued that there are few, if any, action learning purists; most use adapted versions of Revans' action learning (Ruane, 2016). The SMDP in this present study is an adapted form of BDAL, however the management development programmes do include Boshyk's (2010) component parts and Boshyk's (2014) seven dimension questions. However these programmes have also been modified to meet the academic requirements of a management development programme, as well as the needs of customisation for a sponsoring organisation.

### **3.5 RESEARCH PROCESS**

Qualitative researchers vary substantially in the degree to which they rely on specific methods of data gathering (Ritchie & Lewis, 2008). Before this section is expanded upon, it is valuable to acknowledge that there is no single, accepted way of doing qualitative research (Ritchie & Lewis, 2008). Within the framework of narrative inquiry, researchers use a number of research methods (Lieblich, et al., 1998). This present study used various methods, depending on the research phase, as presented in Table 3.1 and summarise in Figure 3.1.

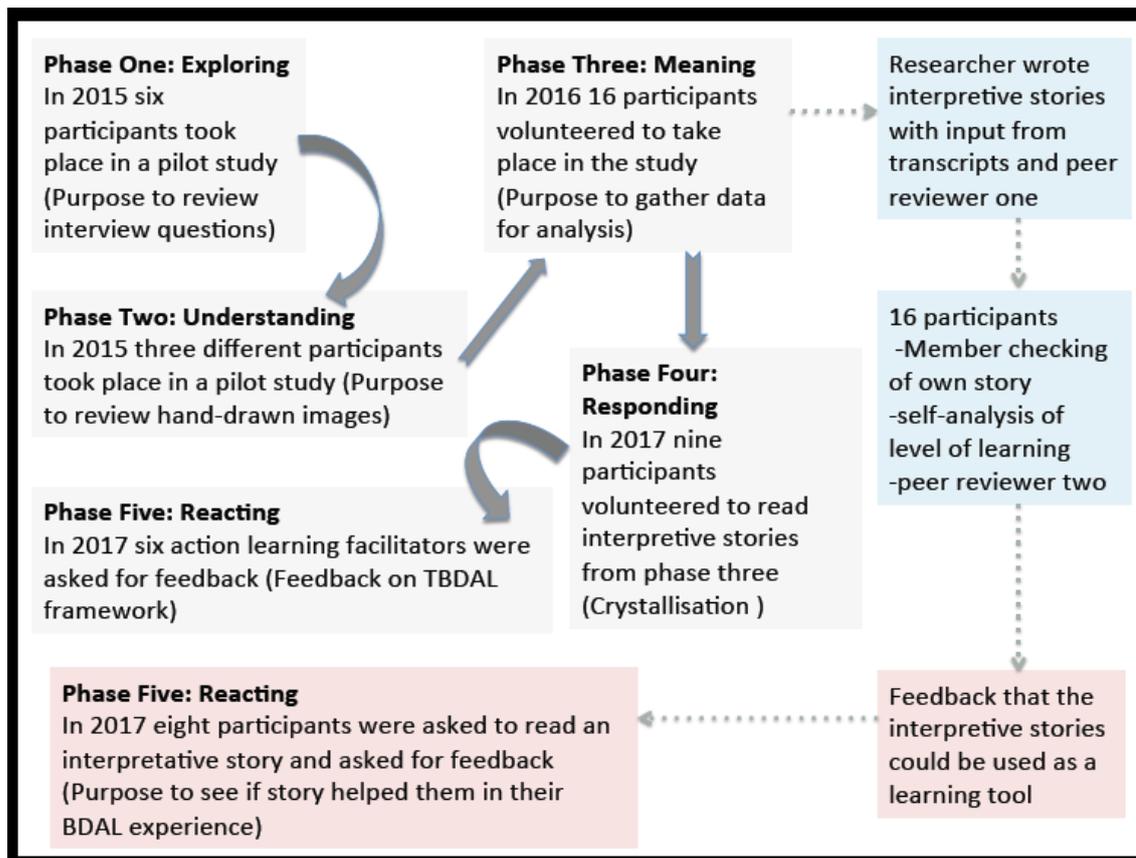


Figure 3.1 The research process

Phase One and Phase Two involved piloting the methods and Phase Three involved hand-drawn images and in-depths interviews - together these methods are summarised as the draw-write-tell method (Angell, et al., 2015). The Phase Four method involved participants sending the researcher an emailed response while the Phase Five method involved action learning facilitators giving feedback via email. These phases are elaborated on below.

### 3.5.1 Phases One and Two: Exploring and Understanding (Pilot research)

Phases one and two were pilot research phases that were included in the research to trial the research methods. A pilot research in qualitative research can also be the “trying out” of a particular research instrument (Baker, 1994, pp. 182-183). The aim in Phase One was to create an opportunity to review the participants’ responses to the interview question on what they learnt. The answers were used to devise the interview guide in Appendix 3. Then based on the feedback from participants in Phase One, the use of hand-drawn images was explored in Phase Two, together with the questions in the interview guide.

In Phase One, the participants struggled to articulate their learning, hence the decision to include hand-drawn images in Phase Two. In addition, the interview guide was refined after every in-depth interview so that the final interview guide used in Phase Three was understood and made sense to the participants.

### **3.5.2 Phase Three: Creating meaning through draw-write-tell method**

Phase Three employed the draw-write-tell method recommended by Angell, et al. (2015), thus bringing together two learning methods, namely: hand-drawn images where the participants add in written text onto the picture and an in-depth interview. Participants drew an image of their learning experience, which they then expanded upon with a short written explanation; this was sent to the researcher a week before the in-depth interview.

#### **3.5.2.1 Hand-drawn images (draw-write)**

As a result of the positive feedback from Phase Two, which included hand-drawn images, a form of draw-write-tell method (Angell, et al., 2015) was chosen. The hand-drawn images are the 'draw-write' component of the draw-write-tell method (Angell, et al., 2015) as hand-drawn images showed how the participants comprehended and interpreted their world (Gribich, 2007). In an action learning experience, participants sometimes struggle to articulate their learning verbally as it can be invisible (Bong & Cho, 2017). Furthermore, only 8.4% of the South African population's home language is English (CIA World Fact Book) and consequently, the use of drawing to collect data is a viable data gathering method. To address the challenges around language and articulation of learning, hand-drawn images were used as they offer insight into participants' experiences not easily accessible when only an in-depth interview is used (Kaptein & Broadbent, 2007). In this present study, these drawings were not computer aided as the participants were asked to express themselves visually by creating an original, hand-drawn image. They then labelled their pictures and included a short written explanation of the image.

Drawings have been widely applied by researchers working with children to explore a range of social and health-related subjects (Angell, et al., 2015). Research conducted by Lev-Wiesel and Liraz (2007) on children who experience negative life events applied drawings preceding the narrative

interview. This was believed to increase the richness of the narrative, as the narrative was more detailed and included more emotions compared to children who were asked only to verbally describe their lives. Harden, Scott, Backett-Milburn and Jackson (2000) conducted research with children and concluded that creative methods afforded children the opportunity for time out. Drawings, while mainly used with children, allow adult participants equally to express thoughts and feelings that are difficult to articulate (Blodgett, Coholic, Schinke, McGannon, Peltier & Pheasant, 2013; Briell, Elen, Depaepe & Clarebout, 2010; Zubroff, 1988). Han and Liang (2015) used narratives with adults in management to understand their learning experiences.

Mezirow (2000) and Taylor (1998) recognise that transformation could be difficult to express or assess. Therefore the drawings were completed before the in-depth interview, giving the participants the time and lexicon to explain their experience during the in-depth interview. This present study involved the participants completing the hand-drawn image before the in-depth interview for participants to reflect on their learning. This helps them to clarify their thoughts and gain an understanding around their learning experience to provide more insightful responses to the interview questions during the in-depth interview. It is important to note that drawings are not rigid but changing entities produced in a certain space and time (Guillemin, 2004). A drawing method is best used in conjunction with other research methods (Guillemin, 2004; Han & Liang, 2015), and in this present study, it was used in conjunction with an in-depth interview. Shepherd's (2016) research applied the method of hand-drawn images when researching the business challenge in action learning.

Asking adult participants to draw expands the researcher's method beyond word-based approaches and meets the objective of understanding the participant's world (Driessnack, 2004). Guillemin (2004) supports this point; having conducted research on illness using drawing, she argues that the action of drawing requires knowledge production and that drawings are a detailed and perceptive research method to explore how people make sense of their world. Engaging research participants is of high priority in qualitative research and visual methods, such as drawing, offers an opportunity for this (Vince & Warren, 2012). A hand-drawn image is a form of a visual image that offers narrative

researchers the opportunity to collaborate with research subjects (Riessman, 2008; Weber, 2008) so that the drawing is about researching 'with' participants rather than 'on' participants. Vince and Warren (2012) confirm the above by stating that involving research participants is important for qualitative research and that visual methods offer worthy opportunities for this.

Hand-drawn images help illustrate ideas and emotions in a more tangible and specific way than words (Broadbent, Ellis, Gamble & Petrie, 2006; Han & Liang, 2015). English is not always the first language of the participants in chosen senior management development programmes of this present study, and non-English speakers also have valuable experiences that they can share but not always articulate with ease (Perry, 2011). Therefore, the introduction of hand-drawn images can overcome the language barrier some participants may have in expressing their thoughts in an in-depth interview.

The kind of interface that holds between experience and its description in language remains a disputed philosophical issue (Devitt & Sterelny, 1987). Experience is more complex than can be expressed in language itself (Gendlin, 1962). Arnheim (1969) recognised that recollections and thinking occurs in visual images and that language is an inadequate presentation of a visual experience, therefore visual images remain a worthy method to explore.

It is not only hand-drawn images that contribute to reflective practice but storytelling is also a place to begin an inquiry and reflection (Arendt, 1982). This view is supported by Branch and Anderson (1999) who agree that stories can engage participants in reflective thinking, writing and learning activities. Despite this drawings remain an under-reported research method (Kearney & Hyle, 2004) and have infrequently been used to explore individual learning experiences in management development (Han & Liang, 2015).

### **3.5.2.2 In-depth interview (tell)**

In-depth interviews are considered the 'tell' component of the draw-write-tell method (Angell, et al., 2015). In-depth interviews are the most common type of data gathering in qualitative studies in education (Merriam, 1998). In-depth interviews are used by many researchers who follow a lived experience in narrative inquiry (Chase cited in Denzin & Lincoln, 2011). Direct comments

about the participants' experiences were gathered from quotations or entire passages during the in-depth interview (Patton, 1990); this was applied to the writing of the interpretive stories. Research interviews provide a chance for detailed research of the participant's personal viewpoints and for in-depth understanding of the personal context of the research purpose (Ritchie & Lewis, 2008).

When researchers gather data through in-depth interviewing, they transform the relationship between the researcher and the participant into one of narrator and listener (Chase cited in Denzin & Lincoln, 2011). Narrative interviewing is intensive as the listener encourages the narrator to explore memories and deeper understanding of their experiences (Polkinghorne, 2007). These in-depth interviews are conversations that allow for memories to be triggered as participants reflect on these experiences and elaborate upon ideas (Rubin & Rubin, 2005). In this present study, each participant has already had the opportunity to reflect on their learning experience during BDAL due to the hand-drawn image. Therefore, the in-depth interview provided an opportunity to explore the learning in detail and address other ideas not included in the drawing.

The in-depth interview guide included semi-structured, open-ended questions guided by Hoggan's (2016) typology of transformative learning to elicit views and opinions from the participants (Creswell, 2009). The questions in the interview guide focused on: unlearning, the hand-drawn image, worldview, self, epistemology, ontology, behaviour, capacity, action learning facilitator, reflection, group work and readiness for change (Appendix 3).

### **3.5.3 Phase Four: Email responses to interpretive stories from Phase Three**

The aim in Phase Four was to enrich the research by gathering feedback from another sample of participants who were asked to read four interpretive stories from Phase Three and respond to the researcher via email.

Additional voices confirm crystallisation (Ellingson, 2014). Crystallisation is a combination of multiple forms of analysis and multiple genres of representation to build a rich account of a phenomenon (Ellingson, 2009). "Crystals are prisms

that reflect externalities and refract within themselves ... what we see depends on our angle of repose” (Richardson, 1994, p. 522). Crystallisation as been beneficial for relationship research in a field where complex dynamics of relating are difficult to appreciate fully without the use of visual media or storytelling practices (Ellingson, 2014). Crystallisation is consequently appropriate for this present study on narrative inquiry that included hand-drawn images and in-depth interviews resulting in interpretive stories.

Ellingson, Manning and Kunkel (2014) suggest that crystallisation includes multiple methods founded in the forms of data gathering. The crystallisation phase co-exists and assimilates with data gathering and analysis (Miller & Crabtree, 1994). In this present study, each account provides pieces of a meaning puzzle but never completes it, rendering the impossibility of total understanding more apparent. Thus, crystallisation does not merely acknowledge but celebrates the partiality of truths generated in this present study (Ellingson, 2009).

Crystallisation and triangulation are two practices that are related but differ in motivation. Triangulation accepts that if two or more sources of data, theoretical frameworks, types of data gathered or researchers unite on the same conclusion, then the conclusion is more credible (Denzin, 1978), with the end result of creating one truth. As confirmed by Bloor (2001, p. 384), “findings may be judged valid when different and contrasting methods of data collection yield identical findings on the same research subjects; a case of replication within the same setting.” Triangulation suggests that a fixed goal is the object of the research (Settlage, Southerland, Johnston & Sowell, 2005). In contrast to triangulation, Richardson (2000, p. 934) suggested the crystal as a “central imaginary” that transcended the “rigid, fixed, two-dimensional” triangle. She summarised that what is seen depends on the angle of the response, as a crystal is multidimensional. Richardson’s (1994, p. 522) view is that research is like a crystal, which grows, changes and alters as the research is “not amorphous.” Settlage, et al. (2005) confirmed that triangulation implies that there is a fixed goal in the research.

In this present study, this is noteworthy as all participants have a varied experience during BDAL. Therefore, Richardson (1994) proposes that

crystallisation is a more suitable goal of research as there is not one truth, hence the choice of crystallisation as it adheres to the philosophy in this present study. The researcher supports that there is no truth out there to be discovered. There are only partial and multiple truths, hence the choice for crystallisation.

#### **3.5.4 Phase Five: Email reaction to the new conceptual model and interpretive stories**

The process followed in Phase Five was to gather feedback via email on the practical application of the new conceptual framework (TBDAL) and the use of interpretive stories as a learning tool. To meet this need, experienced action learning facilitators were approached to partake in this present study so that they could comment on the practical application of the conceptual framework.

Two participants in Phase Three member-checking said “What about sharing these stories with new participants in next year’s programme” and “What about sharing my story with others.” Due to this suggestion, all the interpretive stories were sent to new participants who had just started their BDAL journey, each participant received four stories. The purpose was to gather feedback on whether the interpretive story helped participants who are starting their BDAL experience to understand BDAL challenges.

In summary, this present study expanded on Angell, Alexander and Hunt’s (2015) draw-write-tell method by including an additional method of draw-write-tell-write as additional voices were added in Phases Four and Five. Together, these Phases honour multiple aesthetic perspectives in the development of the research (Mello cited in Clandinin, 2007) and show that there is not only one correct understanding.

### **3.6 RESEARCH SAMPLE**

The chosen sampling for this present study was purposeful sampling (Patton, 1990). Purposeful sampling is a method of choice in qualitative research (LeCompte & Preissle 1993; Merriam, 1998). The reason for choosing purposeful sampling is based on the supposition that the researcher wanted to gain insight and understanding, which means that the sample must be selected from which most can be learnt (Merriam, 2009). Purposeful sampling involved the identification and selection of information-rich cases (Patton, 2002). It

involved identifying and selecting participants that are experienced in the phenomenon of interest (Creswell & Plano Clark, 2011).

The type of purposeful sampling included convenience sampling as the sample was selected based on availability of participants (Merriam, 2009). The convenience sampling method was used following Creswell's (2012) guidance that practical constraints impact the methodological considerations of research. This included the learning institution that applied a form of BDAL, participants and sponsoring organisations that were willing to openly and honestly share information regarding their BDAL experience (Creswell, 2007).

The list of attributes that were essential for this present study were based on the following criteria:

- A learning institution that applied BDAL (based on Boshyk's seven component parts) to their SMDP. The learning institution, which is a **tertiary institution**, was chosen for this present study has been in business since 2001 and has implemented the BDAL learning philosophy in various management development programmes;
- Sponsor and stakeholder support from the sponsoring organisations (Rothwell, 1993);
- Voluntary participation on the SMDP from participants as advised by Pedler and Abbott (2013);
- BDAL was not a new learning approach to the sponsoring organisation. No SMDPs were considered if the sponsoring organisation had not run the programme for a number of years;
- The action learning facilitator (also called the coach) needed to be physically present for all programmes as some SMDPs included a virtual action learning facilitator instead of a facilitator who is physically present, which changes the relationship with participants and the communication mediums applied to the programme;
- It was necessary to have a variety of action learning facilitators across the selected SMDPs so that one facilitator's style was not part of the findings; and

- The action learning facilitators were required to be experienced BDAL practitioners with an understanding of the role of the action learning facilitator and previous facilitators experience.

Three customised SMDPs from one learning institution met the above-mentioned criteria for this present study. The three organisations that were part of this present study operate in a range of sectors, including agriculture, logistics and the financial sector.

The researcher verbally contacted the learning institute and its action learning facilitators to explain the aim of the research. The learning institution confirmed via writing that it supported the research. The researcher, together with the PhD supervisor, sent an email requesting permission from the sponsoring organisation to contact the participants who were part of a senior management programme. Subsequently, the respective action learning facilitator for each of the three programmes in 2015, 2016, 2017 and 2018 sent an email to the participants to introduce the researcher. This also explained the purpose of the research, the research process and asked participants to contact the researcher via email should they be interested to participate. This informed the sample for this present study and derived from three different senior management development programmes that met the criteria for selection.

There was no tangible incentive for participants to be part of this present study; however, participants who volunteered for the research gave the following reasons for accepting: They respected the action learning facilitator who asked them to participate; were willing to contribute to the research due to a positive learning experience during the SMDP and contributed to the education of others working on BDAL.

Once participants volunteered, the researcher invited them formally via email to be part of this present study. The email contained a letter of informed consent (Appendix 4). Schultz, Schroder and Brody (1997) emphasise that in the traditional sense, informed consent means that the participants understand what is required of them and the significance of having taken part in the research. Schultz, Schroder and Brody (1997) question just how well informed participants are at the start of the project. To manage informed consent, the

researcher forwarded a copy of the research proposal to participants. Participants were given time to ask questions before the data gathering commenced. In this present study, there were five phases, each with a different sample.

### **3.6.1 Phase One and Phase Two sampling**

The action learning facilitators who had worked on SMDP in 2015 asked for volunteers to be part of the pilot study. These participants had completed the SMDP; therefore, it was felt that they could comment on the experience. Six participants from the three SMDP in 2015 responded to the request to participate in the pilot research in Phase One. In Phase Two, three participants from three SMDPs in 2015 responded to the action learning facilitators request to participate in the pilot stage. Overall, nine participants was deemed sufficient to pilot the research methods.

### **3.6.2 Phase Three sampling**

All participants in each of the three sponsoring organisations who were part of a SMDP in 2016 were invited by the action learning facilitators to take part on a volunteer basis for the purpose of this present study in Phase Three. The final numbers included:

Financial programme: 58 participants;

Logistics programme: 32 participants; and

Agriculture programme: 10 participants.

Out of 100 possible participants on a SMDP programme, 16 participants volunteered to be part of Phase Three in this present study. For determining a qualitative sample size, there were resource limitations to be considered (Patton, 2015). Merriam (2009) discussed the process for selecting a sample and determining sample size. She noted that it depends on the research question, data gathered, data analysis, and the availability of resources. To the specific question of how many, Merriam (2009) wrote that there is no set answer and recommends including approximate numbers, subject to change. Wolcott's response to Baker and Edwards (2012, p. 4) research on the number of interviews in qualitative research was that "it depends." It depends on

resources, how important the question is to the research and how many respondents are enough to satisfy committee members for a dissertation. Patton (1990) recommends that a minimum number be set but does not state what that number should be.

Baker and Edwards (2012) recommend 15 people but ended up with 14 participants in their research, which was based on data saturation based on discipline, philosophy, substantive topic expertise and geographical locality. Adler and Adler (2012) recommend 12-60 people in qualitative research. King (2005), in her book *Bringing Transformative Learning to Life*, includes 15 narratives. In Phase Three, the population from which the sample was selected were middle to senior managers who range in age between 28 and 45. These participants had taken part in one of the three senior management development programmes during 2016 (Table 3.1). This resulted in 16 participants being represented from all three organisations. In addition, this number was based on the practicality of writing interpretive stories. These are time-consuming to write and analyse. In summary, it is not the quantity of interviews that is important, but rather the care and time taken to analyse interviews (Baker & Edwards, 2012). The researcher chose a pseudonym for each participant to ensure anonymity and confidentiality in the research.

Table 3.2 Demographics of participants from Phase Three data gathering

Pseudonym	Role at work	Race	Gender
1. Prisha	Group accountant	Coloured	Female
2. Fatima	Sales manager	Black	Female
3. Julian	Business controller	Indian	Male
4. Mbali	Communications specialist	White	Female
5. Luke	Solutions architect and information security	White	Male
6. Sandy	Client care manager	White	Female
7. Carmen	Compliance manager	Coloured	Female
8. Nsikelelo	Business performance manager	White	Female
9. Louie	Supply chain manager	White	Female

Pseudonym	Role at work	Race	Gender
10. Sally	Group accountant manager	Coloured	Female
11. Logan	Development manager	Indian	Male
12. Charmaine	Consultant	White	Female
13. Odwa	Quality and training manager	Coloured	Female
14. Mark	Production manager	Black	Male
15. Sam	Finance manager	Black	Male
16. Rhys	Claims manager	White	Male

Initially, 11 participants volunteered to be part of the research, and in their email interactions with the researcher, they responded enthusiastically to the research purpose. Two out of the 11 participants struggled to set interview times and kept cancelling the scheduled date; however, this was mostly due to time constraints rather than lack of willingness to participate in the research. One of the 11 participants drew a picture of individual learning, but then cancelled the interview altogether due to illness; his hand-drawn image was not included in the sample data. This left ten participants who responded openly to questions in the in-depth interview and if there was any reluctance to participate, this was concealed from the researcher.

These ten participants mentioned to other participants on the programme (not necessarily participants in their set) that they found participating in the research personally beneficial to themselves as it was an opportunity to reflect on their learning. Due to the feedback on the hand-drawn image and in-depth interview experience from the ten participants, an additional six participants chose to participate, thus resulting in 16 participants.

### **3.6.3 Phase Four sampling**

The sample in Phase Four included nine different participants who volunteered to partake in the research. However, they were from a subsequent programme in a different year as they completed their programme in 2017. The action learning facilitators sent an email to the participants asking for volunteers for this present study. Fifteen participants emailed the action learning facilitator volunteering to take part in the research; however, once the researcher followed

up with the participants via email, only nine participants responded with detailed feedback via email. All communication with the participants in Phase Four was via email.

#### **3.6.4 Phase Five sampling**

In Phase Five, six action learning facilitators who consult for the learning institution met the criterion of being experienced BDAL practitioners; these have an understanding of the role of the action learning facilitator and have previous action learning facilitator experience in BDAL.

In addition, eight new participants who had just started an SMDP in 2018 responded to the request to give feedback on the value gained from reading interpretive stories. These new participants were asked for feedback on the usefulness of reading the stories, especially at the beginning of the SMDP.

### **3.7 DATA GATHERING**

As set out in qualitative research guidelines, the primary 'instrument' for data gathering and analysis is the researcher (Barrett, 2007). The word 'data' is viewed by Merriam (1998, p. 69) as "ordinary bits and pieces of information found in the environment." In qualitative research, data analysis takes place concurrently with data gathering; this is because analysing narrative data and constantly interrogating data early in the process gives the researcher the opportunity to constantly refine the data gathering (Hunter, 2010). In this present study, there were five phases of data gathering which were summarised in Table 3.1. The data gathering for each of the five phases is discussed next.

#### **3.7.1 Phase One data gathering**

The researcher held six one-hour in-depth interviews to get feedback on the interview questions, the interview process and the type of questions asked. Structuring an interview schedule was not recommended for this present study (Chase cited in Denzin & Lincoln, 2011), but it was suggested that an interview guide be designed. Clandinin and Huber (2002) suggest that participants respond to less structured interview questions in a conversation and this pilot phase was used to try-out the questions. Elliot (2008) emphasised that the participants should be able to tell their own version of their story and that it is important not to inflict a rigid structure on the in-depth interview.

By testing the interview questions, the researcher noticed that the participants struggled to articulate their personal learning and that they did not always have the language to explain their learning. Instead, participants found it more comfortable to give feedback on the action learning group members rather than on their own personal learning. In addition, they were more content to discuss the business problem in the BDAL project rather than to express/reflect on the personal learning because of BDAL.

From the six pilot interviews, the decision was made to include hand-drawn images to enable participants to articulate their learning experience. The researcher also adapted the interview questions several times during this phase to ensure clarity around the interview questions. The data from this phase was not transcribed or analysed.

### **3.7.2 Phase Two data gathering**

The purpose of this pilot in Phase Two data gathering was to test if the participants were able to better articulate their learning and make learning visible to themselves and the researcher. The researcher in this phase tried out the instructions for the hand-drawn images and reviewed participants' responses, together with the interview questions.

Before the participants attended the in-depth interview, they were asked to draw a hand-drawn image of their learning.. The following instructions were sent to the participants via email three weeks before the interview:

*Please hand-draw a picture that depicts your personal learning that resulted while working on the BDAL project. This includes the briefing of the BDAL project at the orientation day, all team meetings, conducting the research and giving the final presentation. Please keep in mind that this is about your learning not the team itself.*

*To help you draw your picture please read the tips below:*

- 1. I am happy if you draw sketches as I am not interested in your ability to draw, but rather your story of learning (please don't use computer aided images).*
- 2. Only draw events linked to the BDAL experience (don't include learning from the assignments or the workshops).*
- 3. Draw any significant events. What caused these events and who was involved?*
- 4. Do you feel that you have changed as a result of BDA; if so how?*
- 5. Please write on the back of your drawing an explanation which tells the story behind your picture.*

6. *The drawing would need to be completed before the interview.*

All three participants responded to the request to draw images, and all wrote that they were not good at drawing. This response of not being able to draw supports Guillemin (2004) and Vince and Warren's (2012) research where they also reported that adult participants mentioned that they could not draw.

The hand-drawn images from pilot Phase Two are included in Appendix 5. However, two drawings, in particular, influenced the decision to apply hand-drawn images in Phase Three. As shown in Figure 3.2, a less sophisticated drawing skill should not be confused with limited learning. Unattractive or clumsy drawing can be valuable if it offers insights or findings relevant to the research question (Roberts cited in Reisz, 2013). In addition, the in-depth interview was an opportunity to explore drawing and personal learning in further detail.

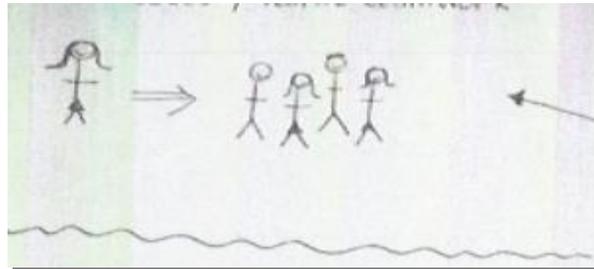


Figure 3.2 Less sophisticated drawing

Simple emoticons, pictograms (such as stick figures in Figure 3.2) and ideograms (such as a spiral) provided the language for participants to explain their learning, thereby giving depth to their in-depth interview. The findings from the pilot support Löfström and Nevgi's (2014) comment that the benefit of drawing is that it allows for greater interpretation. Nevertheless, understanding these interpretations can be challenging, hence the researcher's decision to include the interpretation of the drawing as part of the in-depth interview.

Many participants drew light bulbs and spoke about 'aha moments' during the in-depth interview. The inclusion of a light bulb picture that represents 'aha moments', is seen in Figure 3.3. This gave the researcher the idea to explore 'aha moments' as a question in Phase Three. These 'aha moments' can be called 'sacred learning moments', as they give the participant hope, healing or direction (Tissdell, 2008, p. 31). It was, therefore, decided to include 'aha moments' in Phase Three during the in-depth interview as can be seen in the interview guide (Appendix 3) where the following questions were asked: *If you*

*had any 'aha moment(s)' please draw them and the learning that resulted from these.* In addition the term 'aha moment' was used by the action learning facilitator during reflection sessions so the participants were familiar with the word.

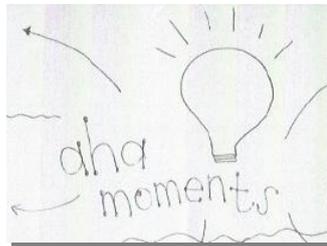


Figure 3.3 'Aha moments' - pilot research participant drawing

In the drawings, the participants did not expand on the events that led to their individual learning; instead, they focused on the outcomes of their learning. This insight led to the researcher providing an additional explanation and tips for the participants when drawing their hand-drawn image. These tips were applied to the final data gathering in Phase Three.

Each participant told their story in multiple voices during the interview. They sometimes spoke from their own perspective, but also from the viewpoint of other set members or other participants on the SMDP. These in-depth pilot interviews did, however, show that the participants were better able to provide a self-description of personal learning and include emotions that they experienced during BDAL. This phase supports Weber and Mitchell (1995, p. 34) in concluding that hand-drawn images extract that which is not easily put into words: "the ineffable, the elusive, the not-yet-thought-through." The researcher adapted the instructions for hand-drawn images and the interview guide to ensure clarity around what is required from the participants. The information and feedback generated during Phase One and Phase Two informed the design of the final interview guide applied to Phase Three data gathering (Appendix 3).

### **3.7.3 Phase Three data gathering**

Phase Three was the main data gathering Phase and included both hand-drawn images and an in-depth interview. The action learning facilitator asked for volunteers at least ten months after the participants had attended the SMDP to meet Hoggan's (2016) transformative learning criterion of relative stability. The

research method of hand-drawn images and the in-depth interview was explained to potential volunteers in an email. Once the participants had contacted the researcher to say they would like to participate, the researcher emailed each participant to set up suitable dates and times to receive the hand-drawn images and to conduct the in-depth interviews. The instructions to the participants that were sent via email for Phase Three included:

*Please hand draw a picture that expresses your **individual learning** that resulted while working on the BDAL project. Please keep in mind that this is about your learning not the team itself.*

*To help you draw your picture please read the tips below:*

- 1. I am happy if you draw sketches as I am not interested in your ability to draw but rather your story of deep learning (please don't use computer aided images).*
- 2. Feel free to use colour if your wish.*
- 3. Only draw events linked to the BDAL experience (don't include learning from the assignments or the workshops).*
- 4. If you had any 'aha moment(s)' please draw them and the learning that resulted from these.*
- 5. What caused each 'aha moment' to take place?*
- 6. What are the outcomes/results of each 'aha moment'?*
- 7. Please write on the back of your drawing an explanation telling the story behind your picture.*
- 8. This would need to be completed before the interview.*

Before the in-depth interview started, the researcher repeated the purpose of the research, as in the consent form (Appendix 4), and gave participants the opportunity to raise questions. As the participants told their story, the researcher asked questions from the interview guide and entered into a dialogue. The interviews were conducted in a safe, quiet and private room and recorded with the permission from the participant. The researcher wrote notes during the interview to keep track of their thinking (Strauss & Corbin, 1998). Each interview was approximately 60 minutes long, depending on the communicativeness of the participant.

The participants in Phase Three attended the SMDP in 2016, and data was gathered between September 2017 and March 2018. Each programme finished at different times, so participants needed time to reflect on their learning, and time was needed to prevent researcher fatigue. In addition, it was important for the researcher to allow enough time to pass after the SMDP was completed

until the time of the in-depth interview to allow for Hoggan's (2016) relative stability as part of the criterion for transformative learning.

Transcripts from the interview were typed *verbatim* by the researcher. The transcripts were detailed, and close attention was paid to the narrator's linguistic practices (such as word choice, repetition, hesitation, laughter, use of personal pronouns). The transcripts were then applied to the writing up of the interpretive stories.

Five months after the participants had attended the in-depth interview, the researcher asked each participant to read their own interpretive story as part of member-checking and to summarise their level of learning after reading the interpretive story. Once the final interpretive stories were written they were emailed to the participants for comments and corrections, which is called member-checking. Member-checking was an opportunity for participants to approve interpretation of the data from the transcripts (Doyle, 2007; Merriam, 1998), thus resulting in a "way of finding out whether the data analysis is congruent with the participants' experiences" (Curtin & Fossey, 2007, p. 92).

Member-checking was important to ensure that the participants agreed with the interpretive story, which, in essence, was an analysis of the transcript. The purpose of asking the participants to self-assess their level of learning was to explore the depth of such learning. Depth of learning is one of Hoggan's (2016) transformative learning criterion. Sterling's (2010-2011) model was applied to the level of learning, as participants were asked to self-analyse their level of learning. Therefore, additional data gathering and analysis was applied due to member-checking.

McCormack (2004) applied member-checking twice in storing stories: once after the location of the narratives and secondly, once the interpretive story of the participant's personal experience was written. She did this as she held multiple conversations with her research participants. However, in this present study, based on participants' availability and the single in-depth interview held, member-checking was completed only once the final interpretive story was written, which was five months after the in-depth interview was held.

Each of the 16 participants received their individual interpretive story to ensure

that they agreed with the researcher's interpretation of their BDAL experience. They were given the opportunity to clarify points and edit their own words. This ensured that the vulnerability of the participant is reduced, as enriched interpretive stories were returned to the participant. In this present study, member-checking involved two key tasks. Firstly, the participants were asked to check that their story summarises their BDAL experience and that the researcher had interpreted the in-depth interview to their liking. Secondly, the participants were asked to list their order of learning once they had read the story. The purpose of listing their order of learning was to determine the depth of their learning using Sterling's (2010-2011) model. One of Hoggan's (2016) criterion for transformative learning is depth.

The researcher sent an accompanying email with each participant's interpretive story asking the participant to respond to the following questions (McCormack, 2000a, pp. 290-291):

- *Does what I have written make sense to you?*
- *How does this account compare with your experience?*
- *Have any aspects of your experience been omitted? Please include these wherever you feel it is appropriate.*
- *Do you wish to remove any aspect(s) of your experience from this story?*
- *I have inserted the orders of learning table in this email to explain depth of learning: there is 1) learning to be more effective and efficient, 2) learning by examining and changing assumptions and 3) paradigm change. Please choose the level of learning that your story depicts and explain why you choose that level.*

Sterling's (2010-2011) levels of learning
First order change – effectiveness/efficiency, which can be labelled as doing things better.
Second order change – examining and changing assumptions, which can be labelled as doing better things.
Third order change – paradigm change, which can be labelled as seeing things differently and is hence transformative.

- *Please feel free to make any other comments.*

Once feedback from the participants was gathered the next step involved gathering data in Phase Four.

### 3.7.4 Phase Four data gathering

The aim of Phase Four data gathering was to introduce crystallisation into this present study setting. Crystallisation facilitates the use of think descriptions and develops multiple ways of understanding (Ellingson, 2009). The participants in Phase Four compared their own BDAL experience to those participants in the interpretive stories. Phase Four participants were asked by the researcher to summarise the similarities and differences they experienced during BDAL as well as the level of their learning. All correspondence was completed via email.

Participants in Phase Four were sent the following details via email:

1. *Read through FOUR short stories from participants who attended a previous management development programme like the one you attended.*
2. *Please answer the following questions:*
  - i. *How are the experiences in the FOUR stories similar and/or different to your experience of BDAL? Please explain the similarities and/or differences in detail.*
  - ii. *What type of learning did you experience? Please chose first order, second order or third order change from Sterling's model below. Please be as specific as possible. If you believe there was not change as a result of your BDAL experience please explain your answer.*

Sterling's (2010-2011) types of learning
First order change – effectiveness/efficiency, which can be labelled as doing things better.
Second order change – examining and changing assumptions, which can be labelled as doing better things.
Third order change – paradigm change, which can be labelled as seeing things differently and is hence transformative.

- iii. *Did you have any 'aha moments' during the BDAL experience? If so, what were your 'aha' moments during BDAL Explain the events that led up to the 'aha' moment? Be as specific as possible.*

This approach allowed a 2017 group of participants to make reference to important points in interpretive stories from a 2016 SMDP. All 16 interpretive stories from Phase Three were sent out to the sample of participants in Phase Four. However, only four stories were given to each participant, as 16 stories are too many for one person to read, and the response rate would have been low. All nine participants in this phase commented on the similarities and differences in their experience in comparison to the four stories they read. They sent their responses to the researcher via email.

### **3.7.5 Phase Five data gathering**

The purpose of data gathering in Phase Five was to gather insight on the final recommendations from this present study: the new conceptual framework and using stories in reflective practice.

The new conceptual framework: action learning facilitators were asked for feedback on the practical use of the new conceptual framework in a management development context. The researcher shared the new conceptual framework with action learning facilitators via email. Their feedback on the application of the framework to a management development context was considered when designing the new conceptual framework in Chapter Six. Using stories in reflective practice: participants were asked to read an interpretive story and comment via email on whether the story helped them understand the BDAL experience. Storytelling can be a place to begin reflection, as suggested by Arendt (1982).

In summary, due to crystallisation, the researcher collected multiple types of data in the format of hand-drawn images, in-depth interviews and written text from a range of participants from three sponsoring organisations in 2015, 2016, 2017 and 2018. In addition, feedback on the application and use of the new conceptual model was also included. The range of sources in data gathering was beneficial as multiple views and input were given.

## **3.8 DATA ANALYSIS**

In narrative inquiry, data gathering and data analysis takes place simultaneously; however, they have been separated in this section for ease of understanding. This section includes the analytical approach for all five phases. Analysis is considered the 'heartbeat' of research (Henning, 2004) but is one of the most challenging aspects of working with qualitative data. Coffey and Atkinson (1996, p. 10) wrote:

*Analysis is not about adhering to any one correct approach or set of right techniques; it is imaginative, artful, and flexible. It should also be methodical, scholarly and intellectually rigorous.*

To ensure that the above criteria are met, the analysis is explained in detail.

### **3.8.1 Phases One and Two analysis**

Phases One and Two data gathering was part of a pilot and do not require analysis.

### **3.8.2 Phase Three data analysis**

In Phase Three, data analysis consisted of narrative analysis and analysis of narratives (O’Kane & Pamphilon, 2016, p. 588):

1. “Narrative analysis” where the transcript is converted into an interpretive story. This includes a description of events that the researcher constructed into an interpretive story using a plot. The findings and discussion derived from the narrative analysis used in this present study is found in Chapter Four; and
2. “Analysis of narratives” where the interpretive story is used to identify potential themes. The analysis of narratives uses stories as data from which themes are developed. The findings and discussion of the analysis of narratives is found in Chapter Five.

#### **3.8.2.1 Narrative Analysis “storying stories”**

Narrative analysis, a description of events from the transcript into interpretive stories using McCormack’s (2000a; 2000b) lenses. McCormack’s (2000a; 2000b) lenses were chosen instead of coding of the transcripts, as the aim was to adhere to the context and not weaken the power of the narrative (Clandinin & Connelly, 2000; Polkinghorne, 1995). McCormack (2000a; 2000b) included the following lenses: process, context, language and moments. These findings and discussion are included in Chapter Four.

One of the requirements of narrative inquiry is that there are transcripts that are interrogated (Riessman & Speedy, 2007). Riesman (1993) confirms that narratives involve interpretation, while Hoskins and Stoltz (2005) agree that interpretation underpins narrative research. The steps taken in this narrative analysis are summarised in Table 3.3.

Table 3.3. Summary of the steps taken in this narrative analysis

Narrative Analysis Procedure called “Storying Stories” (McCormack, 2004, p. 219)	
Steps	Description
1. Immersion in transcript	Process lens: Active listening (McCormack, 2000a).
2. Scan for markers	Process lens: Each transcript scanned for markers using Labov’s (1982) six features (McCormack, 2000a; 2000b) (Appendix 6).
3. Identify story titles	Process lens: Potential story titles taken from the transcript (McCormack, 2000a; 2000b) (Appendix 6).
4. Selection of story title	Process lens: From the collated list, the researcher selected the story title that spoke to the research questions (McCormack, 2000a; 2000b) (Appendix 6).
5. Order titles	Process lens: Ordering the titles offers the outline of the interpretive story (McCormack, 2000a; 2000b).
6. Context, moments and language lenses noted	Context lens: The lenses of context where the text was produced (McCormack, 2000a; 2000b). Moments lens: Where something unexpected happened (McCormack, 2000a; 2000b). Language lens: Analyse the language (McCormack, 2000a; 2000b).
7. Write the interpretive story	Writing of the interpretive stories using the views highlighted through McCormack’s (2000a; 2000b) four lenses.
8. Re-read the transcripts	Re-read the transcripts to see if there were any additional events (McCormack, 2000a; 2000b).
9. Peer reviewer	Transcripts and the interpretive stories were discussed with the first peer reviewer (McCormack, 2000a; 2000b) (Appendix 7).
10 Member check and level of learning	Member-checking: Each story is returned to the participant for comment and feedback (McCormack, 2000a; 2000b). The participants identified their level of learning according to Sterling’s (2010-2011) model.

These steps are explored in more detail.

#### Immersion in transcript: Active listening to the recording

Rather than locating distinct themes across interviews, narrative researchers listen first to the voices within each narrative (Riessman, 2008). Applying

McCormack's lenses as an analytical framework involves multiple 'listenings' of recordings of the interview transcript (Dibley, 2011). As an active listener, the researcher listened to each recording three times before transcribing the interview. The purpose was to note the responses of the researcher to hearing the story from the participants' perspective. The following aspects were noted by the researcher from the listening activity (McCormack, 2000a, p. 288):

- The characters in the story;
- The role they played in the story;
- The main events in the story that contributed towards learning;
- The impact of group dynamics on the participant;
- The choice of words the participants used;
- The tone of voice and laughter; and
- The essence of what they were trying to explain to the researcher.

The characters included the participants themselves, the set members, the sponsor, the line manager, the action learning facilitator, the participants' families and work colleagues. Gergen and Gergen (1984) talk about these characters as the 'supporting cast in a participant's narrative. These characters played an important role as they commented on the participants' change in behaviour, which is one of Hoggan's (2016) typology of transformative learning.

Listening to the recording also identified the main events in the story. In this present study, the main events were the production of the BDAL research document, the final BDAL presentations and the BDAL project's 'aha moments'. These examples provided context to the story. If the researcher found the events relevant to the research questions, these were included in each participant's final interpretive story.

After listening to the interview, the researcher reflected both from the perspective of an action learning facilitator (practitioner) and as a researcher, as "a member of the landscape" (Clandinin & Connelly, 2000, p. 63). This made it easier to understand the participants' experiences and their language. As a practitioner of BDAL, this present study gave the researcher the opportunity to explore her own practice and make "subject positions, social locations, interpretations and personal experiences", all "through the refracted medium of narrators' voices" (Chase, 2005, p. 666). The multiple roles of the researcher

are complex, and research involving people is messy (Connelly, 2007). Therefore, the listening helped the researcher note different perspectives in each story.

Often, the participants would provide much background information to the story. Examples are: details of other participants in their set, the type of problem they were solving, strengths and weaknesses of other set members, their current jobs and people with whom they currently work. This added little to the research questions but provided background information that helped the researcher to participate and build rapport during the interview. This type of information is known as augmentation as it is outside of the story (McCormack, 2000b). It does not meet the research questions and thus not included in the interpretive story.

The researcher's response to comments during the interview was also noted, as the "presence and form" of involvement can impact on the participants' accounts (Polkinghorne, 2005, p. 143). The researcher used responses such as: 'thank you', 'can you tell me more', 'yes', and 'that must have been difficult'. The researcher was also careful not to fall into the role of facilitator. This was noted in two specific cases where one of the participants mentioned that a family member had died and another said they had been sick during the programme. The researcher responded with empathy but did not expand on the topic or give advice, thus keeping to the research purpose of exploring the BDAL experience.

#### Scan for markers, identify story titles, select and order titles

There is a variety of ways to conduct narrative analysis (Polkinghorne, 1995) such as structural narrative analysis (Labov, 1982), dialogic/performance analysis (Riessman, 2008), fictionalised representation (Clough, 2002) and interpretive stories (McCormack, 2000a; 2000b). It is McCormack's (2000a; 2000b) interpretive stories that the researcher chose for analysing this present study because narrative data can be cumbersome and chaotic. The choice to apply McCormack's (2000a) interpretive stories provided means of managing large amounts of data effectively and enabled the researcher to make accessible to the reader, the lived experiences recounted.

To be confronted with pages and pages of transcripts was an intimidating experience for the researcher. It was, therefore, important not to impose categories or codes for themes on interview transcripts, as this loses the individual experience of transformation and separates participants' words from their spoken and heard contexts (McCormack, 2000a). This justified applying McCormack's (2000a; 2000b) lenses to the transcripts, which enabled the writing of the interpretive stories. McCormack's (2004, p. 219) approach was chosen as it highlights "both the individuality and the complexity of life."

Narrative analysis builds on the accrued stories participants share (Griffin, 2017). Thematic analysis at this stage was not applied as the researcher did not want to strip the context and weaken the power of the narrative (Clandinin & Connelly, 2000; Polkinghorne, 1995). McCormack applies the views that are highlighted through the lenses to write an interpretive story, and the researcher looks across stories to create the final "personal experience narrative" (Hollingsworth & Dybdahl cited in Clandinin, 2007, p. 154). McCormack (2000a; 2000b) includes four lenses as part of narrative analysis; these are: process, context, language and moments.

Steps one to five are part of McCormack's (2000a) lens of process, which guides the narrative analysis procedure. McCormack's (2000a) lens of process includes the steps that were followed by the researcher in the actual process of analysing data in the transcripts. The transcript was scanned for 'markers' of stories (Grbich, 2007; McCormack, 2000a). These markers were based on Labov's (1982) six features for a well-developed narrative inquiry. Grbich (2007, pp. 127-128) summarises these six features as:

- 1 *Abstract: an initial clause that summarises the order of events, how the story begins, the point of the story;*
- 2 *Orientation clauses: time, place and events of the story;*
- 3 *Completing action clauses: main parts of the story, including the answer to "what happened then?"*
- 4 *Result/Resolution: what happened finally;*
- 5 *Evaluation: explanation of the meaning of the event, why the story was told; and*
- 6 *Coda: links to the present.*

Labov's (1982) model is useful as an initial point in analysis because it provides

a means of decreasing stretches of text to identifiable narratives (Frost, 2009). Labov's (1982) six features were applied purely to scan the data from the transcript and gain a sense of the whole. In addition, Labov's model was used to check that the final story did have a structure to it, that is, had a beginning, middle and end. To complete the structure of the story, the researcher included hand-drawn images as they related to the text and a conclusion in the form of an epilogue. Labov's structural analysis was not chosen as the only form of analysis. This is because structural analysis only analyses events and does not take the context into consideration (Patterson, 2013), whereas McCormack's lenses (2000a) offer a broader view as it considers process, context, language and moments.

These markers were summarised per participant (Appendix 6). In addition, to Labov's (1982) six points, additional elements were considered in this present study, including theorising (why the participant is behaving in that way), reflecting (trying to work it out), augmentation (additional comments to help with plot formation), and argumentation (element outside of the story). These elements were applied when shaping the interpretive story (O'Kane & Pamphilon, 2016). McCormack (2000b) emphasises that augmentation adds significance to the story, which was seen in Odwa's story about her divorce and Logan's death of a family member.

The researcher also noted the strengths and weaknesses of the people in the BDAL group. This means little in the interpretation of the story and the research question but helps the researcher to build a picture "through the narrative process" and showed how the participant gave meaning to events (McCormack, 2000b, p. 286). Using McCormack's (2000a; 2000b) lenses provided in-depth analysis so that greater understanding was gained by the researcher.

Following McCormack's (2000a; 2000b) process lens involved taking the story titles directly from the transcript. Each of these story titles was summarised into a main story title. The main story title summarises the reason for telling the story and sometimes includes direct words of the participant (Appendix 6). The identification of titles is a summary of the evaluation and epitomises why the story was told and shows the researcher how the participants want to be understood (Coffey & Atkinson, 1996; McCormack, 2000a; Riessman, 1993).

The story titles for each participant are included in Table 3.4, and these stories are not only learning stories but also life stories.

Table 3.4. Story titles per participant from Phase Three

Participant	Story title from Phase Three
1. Prisha	Putting the team before yourself and understanding others' views
2. Fatima	Leading a group of peers created opportunities for self-awareness
3. Julian	Give space to others as you can't control everything
4. Mbali	I am the gymnast who has done a backflip
5. Luke	Questions as a catalyst for learning
6. Sandy	Letting go of limiting beliefs
7. Carmen	This year will bring you to the brink and back
8. Nsikelelo	There are other voices besides my own
9. Louie	Transitioning through letting go of control
10. Sally	Improved confidence and self belief due to accelerated learning
11. Logan	Moving beyond the self and recognising the importance of others
12. Charmaine	The importance of collaboration amongst set members
13. Odwa	Growing in confidence to managing boundaries
14. Mark	Be free in my own ignorance
15. Sam	Understanding myself
16. Rhys	New experiences and a positive outlook.

McCormack's (2000a; 2000b) lenses confirm Frost's (2009) point that when multiple forms of narrative models are applied, it ensures a theoretically informed approach, giving rigour to the research.

#### Context, Moments and Language lenses noted

After the lens of process was completed, the researcher viewed the transcript through the other three lenses of context, moments and language. These three lenses involve interpretation of the transcript. The researcher completed these by making notes in the transcript where there were examples of context, moments and language. These notes were applied to the writing up of each interpretive story.

McCormack (2000a, p. 87) explains, “stories are not told in a vacuum – they are simultaneously situated within a particular context and within a wider cultural context.” The lens of context is important in narrative inquiry as data emerges through the telling of the story. Frank (2000, p. 354) refers to this as the “storytelling relation.” Context is relevant when dealing with complex phenomena, and the way of generating new knowledge is augmented and made whole by considering context (Tomoaia-Cotisel, Scammon, Waitzman, et al., 2013).

The context in this present study is the current social situation of the participant as narrator, and the researcher as listener. It could also include a specific organisational context. This is the reason why the context of situation includes real-life context each person brings to the interview and the interactional aspects of the relationships between the interviewed participants (McCormack, 2000a). The researcher included each participant’s context in the interpretive story if it related to the research questions. If, however, the context was not relevant, the researcher noted the context in the personal notes, and this was not included in the story.

There are three critical dimensions seen as human experience. These include: significance (past), value (present) and intention (future) (Carr, 1986). When the researcher analysed the transcripts with the lens of context, the significance of these three critical dimensions was noted. These three critical dimensions can be seen in each story regarding: why the participant attended the programme (past), what they learnt during the programme (past), where they have made changes since attending the programme (present), what they plan on doing (future), and the intention of how they plan to continue their development (future). Therefore, identifying the past, present and future helped the researcher to structure the context, and this was included in the interpretive story.

The lens of moments refers to the point when the participant, whilst telling their story during the in-depth interview, comes to a new, previously unrecognised understanding of a fundamental issue in the related experience (McCormack, 2000b). These ‘moments’ can be seen as a personal epiphany – a sudden intuitive leap of understanding that unexpectedly emerges as the participant

tells their story. The lens of moments alerts the researcher to the possibility that extraordinary events in the story may be related (McCormack, 2000b). These moments can be linked to the concept of 'aha' moments or moments of insight. Not only are moments included as one of McCormack's lenses, but the idea of 'aha' moments was initially identified in the pilot stage Phase Two of data gathering. This led to the researcher adding a question on 'aha' moments into the interview guide. As a result, the participants themselves were involved in identifying 'aha' moments in the lens of moments.

Moments can be expressed in key words, phrases, descriptions of events, actual stories or other forms of discourse (McCormack, 2000b). Sometimes they are memories retold during the in-depth interview, drawn in a hand-drawn image or occur spontaneously during the conversation in the in-depth interview. Some, but not all of these, may be extreme moments (Denzin, 1994), such as epiphanies. These may be unexpected (surprising moments, moments of strangeness, moments of insight, puzzling moments) or are everyday commonplace moments. They may be moments of intense joy or sadness or self-questioning moments, personal reflective moments, inconsistent or confusing moments (McCormack, 2000a). These moments occur as stories or stories within stories that change and modify the meaning participants give to themselves (Denzin, 1994).

The lens of language is central to the analysis of a transcript because it is "more than a means of communication about reality: it is a tool for constructing reality" (Sprawled, 1979, p. 17). Language helps construct the sense of self and objectivity (Richardson, 1994). If the researcher had applied a straightforward recombination of coding, which resulted in themes, then the clues to understanding language in the text may have been lost. The same words may have varied meanings in different contexts. When the researcher loses what comes before and after words by placing them into codes, the context in which the words were spoken and heard is lost. McCormack (2000a) was troubled that the traditional method of coding for themes in transcripts and researching those themes separated people's words from their spoken and heard context. The result seemed to be the loss of the individual's experience, sometimes called 'the crisis of representation' (Denzin & Lincoln, 1994). In this present study, the

researcher paid particular attention to the language used by highlighting, in the text, words that emphasised the participants' meaning. In addition, the researcher asked the first peer reviewer for feedback on where they noticed the language in the transcripts. The researcher and the first peer reviewer then discussed language examples in the transcripts with the aim of gaining insight into the participant's experience.

The language examples were written down and noted per participant, and the common examples were summarised using McCormack's (2000a; 2000b) suggestion of noting what was said, how it was said and what was unsaid. Examples from Table 3.5 are discussed in Chapter Four.

Table 3.5. Context for language noted in the transcripts

What was said	How it was said	What was unsaid
Groupings and phrases that indicate self and the team	Pauses	Competence
Frequently used words	Defence strategy: word choice in <b>I</b> versus <b>you</b> and humour	Pleasing role
Common understanding	Emphasising importance by repeating words	Intellectualising the story
Space for thought	Reflection in words	
Key words that link to the research questions		

It is important to note the contextual, structural, and performance aspects of language (McCormack, 2000a). McCormack (2000a) confirms that there are three language features that need to be considered at this stage: "What is said, how it is said, and what remains unsaid." In telling stories it is not only language that is important, but also the unsayable. Rogers (cited in Clandinin, 2007) challenges narrative researchers to listen for the unsayable in hearing and responding to stories in an interview and in interpreting an interview. Poland and Pederson (1998, p. 293) suggest that "what is not said may be as revealing as what is said, particularly since what is left out ordinarily far exceeds what is put in." The lens of language was included into the interpretive stories themselves, but the reflection on all lenses are included in chapter four of this

present study. In summary, the lenses of context, moments and language allowed for multiple listening of the transcript and the analysis is included in each interpretive story. Overall, the narrative emphasises the journey over the destination (Ellis & Bochner, 2000), hence the benefit of using McCormack's lenses and writing an interpretive story.

#### Write the interpretive stories and re-read the transcripts

Writing interpretive stories using views highlighted through the multiple lenses of process, context, moments and language was an alternative mode of representation of interview transcripts, which McCormack (2004) called 'Storing Stories'. The end result is that the final interpretive story is the participants and the researchers personal experience narrative (McCormack, 2004).

The interpretive story of a personal experience narrative is valuable when working with a small sample as it brings in minor details into the research (McCormack, 2004). In assembling stories, it was important for the researcher to give voice to the participants by using their own words as often as possible (Guba & Lincoln, 2005). In the interpretive stories the participants' own words are written in bold, and the researcher's interpretation is written in normal font (Appendix 8). For example:

At the end of the programme, after the certificate ceremony, one of the participants in Carmen's group deleted the Whatsapp group for the set. **I thought we were going to stay in contact with each other. Evidently I must have done something that offended her.** This shows Carmen's concern about being liked (extract from Carmen's interpretive story).

It is in this specific sense that a story is a joint production (Mishler, 1986), as it is a relationship between the researcher and participants and between authors and readers (Ellis & Bohner, 2000). One of the benefits of writing an interpretive story is that the researcher is able to include what was unsaid in the analysis of the transcript, for example:

I am still left with the feeling that he does sometimes doubt himself as he mentioned that he volunteered to participate in this research to see if he had mastered the "right things." (Julian-P's interpretive story).

In addition, a summary of each interpretive story was written by the researcher and discussed with the first peer reviewer. This is a reductionist technique, where the language is stripped, and the story is transformed into a brief

summary (Riessman & Speedy, 2007); however, this summary is not part of the data analysis. It was these full stories which thematic analysis was applied to and the findings discussed in Chapter Five.

In addition to the summary, each interpretive story concluded with an epilogue summarizing the story for the reader, where the researcher reflected on the participant's experience (McCormack, 2004). The epilogue in itself is a form of analysis as it summarises each person's experience and links the experience to theory. For example:

*Mbali found that BDAL impacted on her life as she was ready to make the changes in her life which supports Merriam (2004) statement that participants who are at a mature cognitive level benefit from transformative learning. Mbali had prepared very well for this interview, which was an indication of her commitment to this programme and her respect for the action learning facilitator as he asked her to participate in the research. However, she might have over prepared which suggests her need to control the content and add value to the research. Participants are "storytelling organisms" (Connelly & Clandinin, 1990) and through stories participants are able to discover themselves and show themselves to others (Lieblich, Tuval-Mshiach & Zilber, 1998). As a researcher this is the story that one 'wants to hear' as it indicates a complete change, which was represented in the drawing of the caterpillar metamorphosis into a butterfly. However, the journey Mbali took was not an easy journey and she has applied reflection to identify her learning points. It was full of emotion and authenticity. There is also evidence of the learning that has been applied back in the workplace and in her personal life. Mbali's story is about deep learning, "transformative learning involves experiencing a deep structural shift in the basic premises of thought, feeling and actions. It is a shift of consciousness that dramatically and permanently alters our ways of being in the world" (O'Sullivan, et al., 2002, p. xvii). Narrative inquiry benefits those involved in management development as it helps to understand the depth and richness of learning and change, which can occur as a consequence of adopting an action learning approach (Ruane, 2016) (Extract from Mbali's interpretive story).*

Due to member-checking, the participant was able to endorse the researcher's interpretation of the BDAL experience, limiting bias and misinterpretation. The researcher aimed at ensuring that when the participant read their own interpretive story they could relive their experience and hear their own voice in that story while reading the researcher's voice. Interpretive stories are inclusive of multiple voices of both participant (narrator) and researcher (listener) (McCormack, 2000a). In this present study, the narrator started off as the

participant and the researcher, the listener, but once the story was told, the researcher became that narrator, adding to the story by writing an interpretation of the participant's transcript.

#### First peer reviewer

The purpose of a peer review was to create an alternative view as all data has multiple meanings (Krippendorff, 1980; Downe-Wamboldt, 1992). Furthermore, asking for a peer reviewer for input opened the data to additional interpretation. In this study, there were two peer reviewers at separate stages of the research.

A qualified facilitator conducted the first peer review and focused on the analysis of language in the transcripts, using McCormack's lens of language as a framework. The peer reviewer read through six transcripts. The peer reviewer and the researcher then held a meeting to discuss the type of language in the transcripts.

#### Member-checking and level of learning

In this present study, multiple ways determined the credibility of the research and reduced researcher bias. Firstly, a rich description of the data gathering and data analysis is explained; secondly, a peer review was used and thirdly, member-checking was included. The qualitative paradigm in this present study accepts that reality is socially constructed; participants see it to be of people who conduct, participate in, or read and review the research (Creswell & Miller, 2000).

In researching experience, the researcher could fear offending the participants, mostly during the analysis stage (Hoskins & Stoltz, 2005). However, as the interpretive stories were a collaborative effort between researcher and participant, both parties were authors. The interpretive stories also support Creswell (2009, p. 191) who confirmed that member-checking is best done with "polished" interpreted pieces rather than the actual transcripts. Member-checking is a "way of finding out whether data analysis is congruent with the participants' experiences" (Curtin & Fossey, 2007, p. 92). Narrative researchers publish longer stories compared to other qualitative researchers, and this may make the participant feel vulnerable or exposed (Chase cited in Denzin & Lincoln, 2011), hence the importance of member-checking.

The feedback from the participants, after member-checking, is included in Table 3.6. Through member-checking, the participants confirmed that they did recognise their own 'voice' and experiences in interpretive stories.

Table 3.6 Feedback from participants on their stories as part of member-checking

Participant	Comments
Luke	The "anonymization" helps. Thank you very much for sharing with me.
Sally	Thank you so much.
Sandy	I think you captured the essence of my experience perfectly. Thank you for providing this feedback to me as well. It was good to see an "independent" summary of my experience, and I will keep this with me as a reminder and to reinforce the learning. What about sharing these stories with new participants in next year's programme?
Carmen	No changes required.
Mbali	I feel a bit embarrassed at how often I used certain words like 'stuff' and 'broken' and other adjectives in triplicate. Thanks again, a truly intriguing exercise. What about sharing my story with others?
Julian	Thanks for this. It reflects what we have discussed very well.
Rhys	Thank you for this. I am happy with your comments and your interpretation of my experience. It was quite interesting to read my own view of events. It is cool that you have included the art.
Charmaine	Yes, it is in line with my thinking. You can use as is.
Sam	It makes sense as it compares to my experience. I think it pretty much captures everything.
Nsikelelo	I am OK with what was represented. I am signing off on what you've captured as this was the interpretation of what was conveyed by me at the time.
Logan	It does make sense. It is accurate in terms of my experience. I did not realise the fact that I did not personalise my experience, thanks for this insight. I respect your insight and approach to our interview. Thanks for this insight.
Louie	Yes, it makes sense. It links to my experience. I am comfortable with the way it's written and explained.
Fatima	I agreed with the interpretation.
Mark	I'm aligned with the content of it as a reflection of my experience. I wish someone had shared their story with me while I was on the programme.
Prisha	Yes, everything was accurately presented, and I have no further comments to add or remove.
Odwa	I have read the story and I am happy to sign off.

McCormack's (2000a; 2000b) lens of language analyses what was unsaid, and

these unsaid aspects were included in the interpretive story. Due to member-checking, the unsaid aspects become visible to the participant. For example: "*I did not realise the fact that I did not personalise my experience, thanks for this insight.*" Very few participants elaborated on their points; however, some edited their language and grammar. The 16 participants signed off their interpretive stories.

The participants did not change any of the core content of their interpretive stories, which shows that there was an appropriate interpretation of the experience from the transcripts. There was no blame for the comments or abdication of remarks, nor did the participants try to further explain themselves and their actions linked to the stories. The researcher was left with the feeling that participants agreed with the interpretation of their experience. The most difficult part of reading one's own interpretive storytelling is what participants tell themselves. Member-checking ensured that the participants' own meaning was represented and not only that of the researcher (Tong, Sainsbury & Craig, 2007).

When the interpretive stories were returned, the researcher reflected on and responded to the participants' comments, for example by updating the stories or correcting sentences. Out of all the participants, Mbali made the most changes, mostly in terms of grammar and word substitution; for example, she took out the word "stuff." In the original interpretive story, she spoke about gaining confidence and said in the interview, "*That was very, very, very powerful, a transformative thing for me.*" Mbali then edited the story and took out the words "very, very." She mentioned in the interview that she is a good writer and seeing her spoken word in print concerned her, so she made many grammar changes.

The repetition of the words gave the researcher insight into the extent of her feelings and the impact of the change. After the changes were made, the essence of the story remained the same. However, with the deletion of the repeated words, the emphasis was not seen in the story. In the interpretive story epilogue, the researcher wrote the following sentence, "*However, she might have over-prepared, which suggests her need to control the content and add value to the research.*" Mbali's response to this sentence when she read the story was "*great insight.*" It is of interest to note that her editing of the story

in such detail created the perception of a 'perfect' story, and she was also the participant who drew the 'perfect' picture.

Participants in this present study were asked to self-assess their level of transformative learning, using Sterling's (2010-2011) level of learning. To address the sub-research question (Q1) regarding the extent of individual transformative learning they experienced. Sterling's (2010-2011) model was chosen as it is an easy model for participants to understand and it addresses one of Hoggan's (2016) criterion for transformative learning: *depth* of learning. All 16 participants in the sample responded to the question on what level of learning using Sterling's (2010-2011) model they experienced due to BDAL. Participants were asked to confirm the type of learning based on Sterling's orders of learning: 1<sup>st</sup> order: effectiveness/efficiency (doing things better), 2<sup>nd</sup> order: examining and changing assumptions (doing better things) and 3<sup>rd</sup> order: paradigm change (seeing things differently). Using Sterling's (2010-2011) model gave the participants an opportunity to analyse their own behaviour. The researcher noted that all participants felt that they had seen a change and that the learning had moved past the first order learning, but they did not provide enough detail to meet the transformative learning criteria of breadth, depth and relative stability (Hoggan, 2016). Therefore, the researcher had to only use the interpretive stories to determine if transformative learning took place.

Table 3.7 is a summary of the orders of learning confirmed by the participants via email. There was a mixture of 2<sup>nd</sup> and 3<sup>rd</sup> order learning, using Sterling's (2010-2011) model.

Table 3.7 Depth of learning during member-checking

Depth of learning		
Name	Level of learning	Examples
Prisha	3 <sup>rd</sup> order	I felt I learnt this when examining a situation and then rather improve something (build on it) than change it completely. I have applied this in my new position since SMDP. I have transformed to see things differently, completely from a new perspective so that I am able to make better strategic decisions.
Sandy	3 <sup>rd</sup> order	I have applied the learning in everything I do. I focus on client feedback and what we need to do to meet their ever changing needs. In terms of my team, I have started with

Depth of learning		
Name	Level of learning	Examples
		'time to think' with the aim of creating a thinking environment to gain insights from multiple people.
Louie	3 <sup>rd</sup> order	I realise that I tend to perceive something as right or wrong based on my frames of reference, so I constantly need to listen to what they are saying or not saying, doing or not doing and then approach them in a different way and change the way I correctly or incorrectly perceive them. I constantly need to examine what is going on in my team and where I can do things differently to set an example.
Nsikelelo	3 <sup>rd</sup> order	The first order change happened pretty quickly as I applied the models to day to day work and in presentations with stakeholders. The 2 <sup>nd</sup> order brought in other aspects of thinking, as I brought in other broader aspects and I could robustly check my assumptions. 3 <sup>rd</sup> order is the harder to adopt but I have shifted my paradigm thinking on work and what I do and this can be attributed to my paradigm-shift from BDAL. I can honestly say that because of my learning, I was able to manage the shift in my thinking a lot better than I would have previously.
Julian	3 <sup>rd</sup> order	I have improved the basic structure of process on a more holistic level to make it more sustainable and also to get colleagues from other teams to start thinking along these lines.
Charmaine	3 <sup>rd</sup> order	Used diversity, how to adapt to the changes happening, implemented new strategies to deal with diverse client base, new marketing initiatives, negotiations with clients, value system of the business and collaborating with other role players at home (family and friends) and work.
Rhys	2 <sup>nd</sup> order	To review opinion and feedback holistically, allow the client an opportunity to present potential counter arguments for review.
Mark	2 <sup>nd</sup> order	BDAL taught me to take into consideration that diversity is our trump card when it comes to solving problems and creating new business. Success of the negotiations was not necessarily based on the value proposition on the table but mainly on whether I had shown enough 'respect and cultural' sensitivity in the way I conducted myself.
Fatima	3 <sup>rd</sup> order	My approach to working in teams has changed. I do not assume that we have the same objective so I take time to ask, "what are we trying to achieve" before going forward with the actual work project. This ensured better alignment and outcomes.
Mbali	3 <sup>rd</sup> order	I saw the world through different eyes after BDAL. However, my work environment has not created a place for me – huge disconnect between my learning and the world of work. The workplace does not encourage 3 <sup>rd</sup> order change. I challenge

Depth of learning		
Name	Level of learning	Examples
		my own assumptions daily. Despite me “seeing things differently and experiencing transformative learning”, there is a disconnect at work. However, my career has progressed as I am in a senior position.
Carmen	3 <sup>rd</sup> order	Learning more towards 3 <sup>rd</sup> order due to my application and stories that I told in the interview.
Sam	2 <sup>nd</sup> order	I have been able to look at the big picture with regards to my role at work and my responsibilities generally. I communicate effectively with my team so they know what is expected of them and me as a manager. With my leaders, I try to get clarity on what they expect from me so we are aligned on deliverables. This has helped me focus on what matters in my job delivering a successful performance in 2017.
Luke	2 <sup>nd</sup> order	I would choose the second order if I look at the BDAL specifically because I believe that I may have changed my view of certain areas. As I mentioned, most of my learning stemmed from the relative dysfunction within our team. As such, I think that I focused more on those aspects and not on the broader learning that I could draw. I suppose it caused me to have “blinkers” on unfortunately.
Odwa	3 <sup>rd</sup> order	In terms of my growth, I am 3 <sup>rd</sup> order. Since our meeting, I am happy to report that I have also grown more and am in a constant cycle of development.
Logan	2 <sup>nd</sup> order	I have become aware of a lot more and made a shift in thinking.

Overall, all 16 participants chose a level of learning that showed change as they chose second order learning (examined and changed assumptions) and third order learning (paradigm change). No participants chose first order learning, which is about effectiveness and efficiency (Sterling, 2010-1011). This implies that all 16 participants felt that they had experienced a change however for this change to meet the Hoggan’s (2016) criteria for transformative learning this change needed to meet the criteria of breadth, depth and relative stability to meet the research sub-question on the extent of transformative learning.

As a result of member-checking, participants in Phase Three suggested that the interpretive stories could be applied as a learning tool in future BDAL experiences. Participants concluded that they felt that the interpretative stories could be shared with new participants who have just started their SMDP:

*What about sharing these stories with new participants in next year's programme? (Sandy's-P3 comments from member-checking).*

*I'm aligned with the content of it as a reflection of my experience. I wish someone had shared their story with me while I was on the programme (Mark's-P3 comments from member-checking).*

Due to this suggestion from Phase Three participants, Phase Five, was introduced where a new sample of participants gave feedback on the use of interpretive stories as a learning tool (Appendix 9). Chapter Five includes findings and discussion on this feedback on using stories as a learning tool.

In summary, narrative inquiry and use of interpretive stories focused on the importance of keeping the story intact. In this present study, narrative analysis involved crafting an interpretation of each story from the transcript. One could argue that these stories are sufficient and the research was complete as the researcher was more interested in the distinctions between experiences rather than the commonality in the stories. However, the researcher in order to design a conceptual framework needed to find themes that included themes which could be used to design the final conceptual framework.

### **3.8.2.2 Analysis of narratives**

Once the interpretive stories were written, the researcher moved onto the analysis of the interpretive stories, which was called analysis of narratives. The purpose of analysing narratives was to search for common themes (Clandinin, 2007). In this present study the analysis of the interpretive stories involved a more traditional approach of looking for patterns, which were later clustered into global themes using thematic analysis. Braun and Clarke's (2006) approach to thematic analysis was applied to reveal the stories within each story, as opposed to commonality. In thematic analysis, concepts were extracted in the form of basic, organising and global themes. The basic, organising and global themes were illustrated in a thematic network diagram, which is a web-like representation (Attride-Sterling, 2001). The organising and global themes were included in the new conceptual framework, Transformative Business-Driven Action Learning (TBDAL), which is a transformative-learning enabled BDAL framework. The steps in the analysis of narratives are summarised in Table 3.8.

Table 3.8 Summary of the steps taken in the analysis of narratives in Phase Three

Analysis of narratives: Moving from interpretive stories to themes	
Steps	Description
1.Highlight the patterns via coding	Code the interpretive stories manually by using coloured pens to indicate potential basic themes (Braun & Clarke, 2006). Thematic analysis of the interpretive stories to identify patterns (Braun & Clarke, 2006). Thematic analysis was completed with the aid of thematic networks (Attride-Sterling, 2001). Thematic networks use terminology basic themes, organising themes and global themes (Attride-Sterling, 2001) (Appendix 10).
2.Second peer reviewer	The second peer reviewer read all 16 stories and identified transformative learning primary and secondary outcomes using Hoggan's (2016) typology of transformative learning as well as confirms transformative learning for 15 out of 16 participants (Appendix 11).
3.Comparison between Phase Three and Phase Four participants.	Comparison between participants in interpretive stories (P3) and participants who experience BDAL in 2017 (P4) (Crystallisation).
4. Responses: Action learning facilitators and new participants Phase 5Five	Action learning facilitators were asked for feedback regarding the new conceptual model and participants (P5) were asked for feedback on the application of interpretive stories as a learning tool. (Crystallisation).

These steps are explored in more detail.

#### Highlighting patterns via coding

It is debated whether narratives, such as an interpretive story, should be analysed or should stand-alone (Thompson, 2012). A common criticism of coding is that the context is lost (Bryman, 2012). At this stage, the researcher decided to analyse the interpretive stories, supporting Riessman (1993) who wrote that narratives need understanding. Therefore, thematic analysis was applied to each interpretive story to gain a deeper understanding (Attride-Sterling, 2001). Interpretive stories are constructions (Polkinghorne, 1995) and "require interpretation" (Riesman, 1993, p. 22). In everyday use, a story speaks for itself, but in narrative inquiry, the story requires interpretation and attention as to how the facts were pulled together, for whom the story is constructed and for what purpose (Riessman & Speedy, 2007). Without the standardising of analysis, the research findings could be viewed as unreliable (Franzosi, 2004).

To enrich the interpretations and aid researchers in other studies, the analysis is explained in detail (Attride-Sterling, 2001). In this present study, it is important to note that the whole interpretive story was coded, including the hand-drawn images.

Thematic analysis was chosen as it is compatible with a constructivist paradigm (Braun & Clarke, 2006). The application of thematic analysis allowed the researcher to make active choices about the form of analysis (Braun & Clarke, 2006) and it has been applied by prominent narrative researchers such as Murray (2003) and Riessman (1993).

Braun and Clark (2008) offer a guideline to thematic analysis that includes six points of analysis, which was applied to the interpretive stories in this present study. In addition *thematic networks* were used which Attride-Stirling (2001) suggests aids thematic analysis. "Thematic analysis seek to unearth the themes salient in a text at different levels, and thematic networks aim to facilitate the structuring and depiction of these themes" (Attride-Sterling, 2001, p. 387). Attride-Sterling (2001) uses the following terminology to describe the themes: basic themes (which are the lowest-order theme from the textual data), basic themes when joined together form organising themes (clusters of similar issues), and together organising themes form global themes (the final tenet placed in the core of the thematic network).

The researcher in this present study followed Braun and Clark's (2008) six points:

Point One: Immersed in the Data. The researcher immersed herself in the data so that she was familiar with the depth and breadth of the content. This involved the researcher typing up the interview transcripts verbatim, continual listening to the interview recordings, writing up of the interpretive stories and "repeated reading" of the interpretive stories with the aim to identify patterns and meaning (Braun & Clark, 2008, p. 87).

Point Two: Generating Initial Codes. This point is about reduction of the data (Attride-Sterling, 2001) and involved the production of initial codes from the interpretive stories. "Codes identify a feature of the data that appear interesting" (Braun & Clark, 2008, p. 88). This process of coding was similar to that

described by Miles and Huberman (1994). In this present study the researcher read through the interpretive stories four times and coded and recoded to devise a *coding framework*. The coding framework is based on the recurrent issues in the interpretive stories (Attride-Sterling, 2001). The coding framework was completed manually by using coloured pens to indicate initial codes in the interpretive story (Braun & Clark, 2008). The researcher underlined single words, passages or quotations (Miles & Huberman, 1994). For example in Sandy's Story, (Appendix 12) Figure 3.4 where the words 'control' and 'more open' were coded. The code was named and written in the margin of the interpretive story.

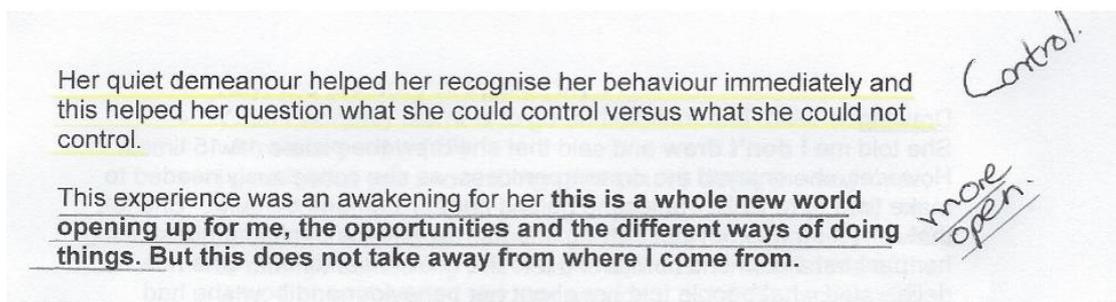


Figure 3.4 Example of initial coding

As a result of this initial coding, 61 initial codes were derived where the emphasis was conceptual and a given quotation could be classified under more than one code. The quotations that were linked to the codes were written down in the researcher's notes.

Point Three: Identifying Themes. "This phase refocuses the analysis at the broader level of themes, rather than codes" (Braun & Clark, 2008, p. 89). The researcher sorted through the initial codes and clustered them into themes. A theme is "an aspect of the structure of experience" that recurs regularly in the text (Van Manen, 1990, p. 87). Braun and Clark (2008) recommend using a visual depiction to sort codes to themes, such as a table. The researcher used Post It notes to sort codes into themes and then assembled the themes into a table. In this present study the 61 initial codes were grouped into clusters called basic themes, which are the lowest order themes. The researcher was interested in basic themes that spanned across all interpretive stories, but the researcher also looked for contradictions and differences. There were 52 basic themes which resulted from the clustering of initial codes. The researcher then

took the basic themes from the stories and assembled them into groupings based on larger issues, called organising themes, which involved the re-naming of the original set of basic themes. The basic themes were grouped into 21 organising themes which are categories of basic themes grouped together to summarise more abstract principles. The organising themes were then summarised in light of the main argument into five global themes, which are the main themes represented in Chapter Five. Global themes are super-ordinate themes encapsulating the organising themes in the text as a whole (Attride-Sterling, 2001).

Point Four: Refining and reviewing. This point entailed the refinement and reviewing of themes (Braun & Clark, 2008). The coded data was reviewed and checked to see that a pattern was formed. Then a review of the validity of themes in relation to the data was completed.

A thematic map was designed per participant using colours to depict a theme. For example, in Figure 3.5 the global theme of *sense of control* and its organising themes and basic themes are written in green. The global theme is written in the circle, the organising themes are sub-themes and are included in bold in the text box. The basic themes are listed under organising themes in bullet points (Appendix 13).

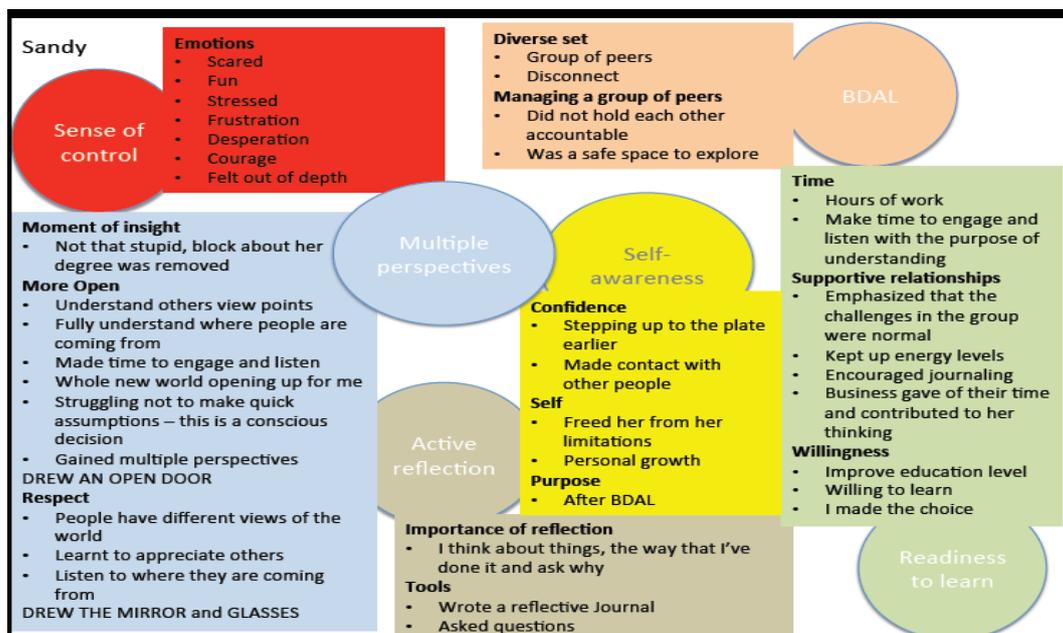


Figure 3.5 Example of Sandy's thematic map

After reviewing the thematic maps for each participant, the researcher decided to join the themes of BDAL (written in orange) and readiness (written in red) to form a global theme: *precondition for transformative learning* within BDAL as both these themes describe the antecedents to BDAL. The global theme of preconditions for transformative learning included the following organising themes:

- Readiness of the participant to learn;
- Supportive relationships; and
- Team conditions.

In addition to the thematic maps the thematic analysis was completed with the aid of thematic networks. Thematic networks use the terminology basic themes, organising themes and global themes (Attride-Sterling, 2001). Thematic networks allow for codification of textual data, discussion of the steps in the analytical process, aiding in the organisation of analysis and its presentation to identify patterns (Attride-Sterling, 2001). Thematic analysis uncovers themes relevant in the text at different levels while thematic networks aid the structuring and description of these themes (Attride-Sterling, 2001). Thematic networks are represented as web-like maps depicting the salient themes at each of the three levels, basic, organising and global themes, and the relationship between the themes is illustrated (Attride-Sterling, 2001). Examples of each thematic network is presented in Chapter Five to introduce the basic, organising and global themes. The use of thematic maps and thematic networks enabled the researcher to review and think about the links and relationships between the basic, organising and global themes, all of which are explored in Chapter Five. Chapter Five takes each thematic network in turn and explores the content, with examples from the interpretive story. The thematic network is a tool for the researcher but also the reader.

Point Five: Defining and Naming Themes. The names are concise and give the reader a sense of what the theme is about (Braun & Clark, 2008). The researcher read through the names of the basic, organising and global themes and checked to see that the names were concise and certain words were changed and updated to ensure understanding of each themes. The coding list,

basic, organising and global themes were listed in a table format (Appendix 10).

Point Six: Writing up of themes. This point includes the writing up of the themes, which includes direct quotations and is written up in Chapter Five.

### Second peer reviewer

A researcher in the field of management development who understands BDAL philosophy, transformative learning and qualitative research conducted the second peer review. The second peer reviewer was involved in two aspects of the research. Firstly, she helped challenge the researcher's assumptions and asked questions about the methods (Lincoln & Guba, 1985). Secondly, she analysed the 16 interpretive stories, according to Hoggan's (2016) typology, looking for evidence of transformative learning.

The following is a summary of what the researcher provided her:

She was supplied with the primary research question and sub-questions and asked to read each case with a view to identifying evidence to indicate that individual transformative learning had taken place during a BDAL management development programme. She was asked to remain mindful of Hoggan's (2016) typology but was also open to identifying any new categories of change should they emerge.

The second peer reviewer, after reading all interpretive stories, felt that the learning outcomes could be classified into primary and secondary transformative learning outcomes. She identified the learning of primary and secondary learning outcomes, using Hoggan's (2016) typology of learning. The primary learning outcome was the predominant learning outcome seen in each interpretive story. The researcher listed this primary outcome and made comments on this primary outcome. She concluded that most of the primary outcomes included a new awareness on self (self-knowledge and a sense of empowerment) and becoming more discriminating (epistemology). The peer reviewer then looked for secondary learning outcomes which she indicated was a result of the primary learning outcomes. Hoggan (2016) also indicated that primary learning outcomes lead to secondary learning outcomes. In this present study, the secondary learning outcomes included new behaviour (social action, professional practices), a new way of being and a new perspective on the world (Appendix 11). An example from the second peer reviewer's summary for one participant (Prisha) is shown in Table 3.9.

Table: 3.9 Typology of learning from Prisha's story

Participant	Primary Learning	Secondary Learning
Prisha	Main learning for Prisha was about SELF, specifically her <u>view of self and self-knowledge</u> . Her need for control of her own environment and her subordinates was contributing to her feelings of stress. This insight to 'let go' impacted on her BEHAVIOUR	BEHAVIOUR that has since changed is in line with more strategic thinking (stepping back). Her <u>actions have become consistent with new perspectives</u> gained by becoming less stuck in the detail and more considerate of others and more patient (social action).

The peer reviewer used primary learning outcomes and secondary learning outcomes as a means to identify that individual transformative learning had taken place as a result of the BDAL experience. The peer reviewer confirmed that there was evidence of individual transformative learning as she commented:

*The stories offer strong evidence that transformational learning took place, at least for individuals in this sample. It is also clear that insight into self, changes in worldviews or ontological positions and expanded capacity preceded shifts in behaviour. This suggests that the transformational learning process can be triggered by various antecedents that then, and only then shift behaviour (Second peer reviewer summary).*

The identification of primary and secondary learning outcomes gave the researcher the foundation to discuss the extent of individual transformative learning, which is one of the sub-questions in this present study. The researcher then explored the primary individual learning outcome that was identified by the peer reviewer in terms of breadth, depth and relative stability (Hoggan, 2016), to determine the extent of individual transformative learning and this is discussed in Chapter Four.

Therefore, the second peer reviewer contributed to the sub-research question: To what extent did participants experience transformative learning during BDAL?

### **3.8.3 Phase Four: Comparison between Phase Three and Phase Four**

Phase Four includes the responses from a sample of participants who attended a programme in 2017. Phase Four participants were asked to comment on the

similarities and differences between their own experiences and the experiences they read in the interpretative stories from Phase Three.

The researcher analysed the email responses from the participants in Phase Four data gathering. The researcher highlighted sections of the emails that corresponded to the global themes. Table 3.10 is an example of the data gathered from Phase Four and includes the participant, the impact of BDAL on their lives, the level of learning and the global themes the researcher identified in the emails with quotes from the email. The full analysis from Phase Four is seen in Appendix 14.

Table 3.10 Summary of analysis from Phase Four (P4) for participant MB

Participant from P4	Impact of BDAL on their lives.	Level of learning	Global themes and direct quotes from the emails
MB	"We are so busy doing life that we don't make time to learn."	3 <sup>rd</sup> level	<p><b>Multiple perspectives:</b> <u>Change in thinking:</u> "The biggest learning has been my own approach to my team and colleagues." "Grow my thinking... do things differently. I don't mean from an operational point of view." <u>Different person:</u> "This experience has taught me that I need to spend time with myself, my dreams, my thoughts and my visions and in doing that, I am growing myself, my team and the business."</p> <p><b>Self-awareness:</b> <u>Self-confidence:</u> "I learnt that I am far more resilient and stronger than I thought."</p>

#### 3.8.4 Phase Five: Action learning facilitators and new participants

Two types of feedback was gathered in step four. Firstly, feedback from action learning facilitators on the new conceptual framework, that included the basic, organising and global themes from this present study. The aim was to gather their input via email on whether they felt the framework contributed to the practice of facilitating individual transformative learning during BDAL. Secondly, feedback on the use of stories as a learning tool from participants who are currently experiencing BDAL. All feedback was summarised and placed in a table format. The data from the action learning facilitators is summarised and discussed in Chapter Five. The data from the participants on the employing

interpretive stories as a learning tool was summarised and broken down into the following themes: tips on managing BDAL, comfort, expectations and relating to the story (Appendix 9). The findings on the use of interpretive stories is included in Chapter Five.

### **3.9 RESEARCH QUALITY ASSURANCE**

Constructivist researchers suggest that it is not really possible to establish criteria for good quality work (Miles, Huberman & Saldana, 2014). It is not always possible to get everything right, but this present study aims at what Wolcott (1990) proposes in trying to not get it wrong. Miles, et al. (2014) list five criteria for good quality research: Confirmability, Reliability, credibility, transferability and application.

In this present study the following was considered: Confirmability meaning that the research is free from researcher bias. Objectivity is where the research process and its results are expected to be relatively neutral and free from researcher bias (Miles & Huberman, 1994). To meet this requirement, the research method was described in detail, conclusions were directly linked with the data displayed and the researcher remained sensitive to any biases and assumptions. The reader can follow the sequence of how data was gathered, analysed and conclusions drawn. Lincoln and Guba (1985) state that the method should be detailed enough to be audited by an outsider. The five phases of data gathering and analysis from this present study are explored in detail in this chapter. In narrative inquiry, it is important for the researcher to explain the process of analysis in detail so that there is an audit trail (Johnson & Rasulova, 2016), McCormack's (2000a) lens of *process* provide this audit trail. By providing an audit trail, authenticity and conformability is shown. Once the interpretive stories were written member-checking, advocated by Creswell and Miller (2011), ensured that the researcher remained free from bias as the participants themselves checked the interpretive stories. In addition two sets of peer reviewers contributed by adding additional perspectives into the research gathering and analysis.

Reliability is a stance on whether the research is consistent and stable over time and whether replicated studies would produce comparable results (Miles &

Herberman, 1994). To ensure reliability, the research questions were clear and the researcher's role was described. To ensure that the data between all three programmes were comparable, the same action learning methodology, BDAL, was applied across all three management development programmes. However, it is acknowledged that all three action learning facilitators have their own style of facilitating. In addition, the global themes from Phase three were reinforced by the participants in Phase four data gathering and analysis.

Credibility is achieved when deep understanding occurs (Wolcott, 1990). To meet this criterion, hand-drawn images and in-depth interviews produce converging conclusions. Polkinghorne (2007, p. 479) writes that the researcher's aim is not to discover "whether narrators' accounts are accurate reflections of actual events, but to understand the meanings people attach to those events." To promote trustworthiness, member-checking is applied when the participants in Phase Three read their own interpretive stories and confirmed that they were an accurate account of their experience (Babbie & Mouton, 2009). Participant consent forms for Phases Three and Phases four data gathering were signed and scanned onto a password-protected computer for filing.

Transferability entails how far the conclusions can be generalised and transferred to other contexts (Miles & Huberman, 1994). However in qualitative research the aim is not to generalise but to rather provide a rich, contextualised understanding of BDAL experience (Lincoln & Guba, 1985).

Application takes place if the pragmatic validity leads to intelligent action (Miles & Huberman, 1994). It is hoped that the recommendations add value to all parties: the management development institution; the sponsoring organisation; the action learning facilitator and the participants.

### **3.10 REFLECTION FROM THE RESEARCHER (REFLEXIVITY)**

Researchers "position themselves" in a qualitative research study. This means that researchers convey (e.g. abstract, in a method section) their background (e.g. work experiences), how it informs their interpretation of the information in the research, and what they have to gain from the study (Creswell & Poth, 2018).

In qualitative research, it is considered important for the researcher to identify ones biases, as the researcher is the main research instrument. Locke (in Creswell, 1994, p.163) asserts, “this contribution to the research environment can be quite beneficial, rather than disadvantageous”.

As researcher, I was constantly aware that I am an action learning facilitator who works with BDAL on a daily basis. This comes with certain biases but my aim was to ensure that the participants voice spoke louder than my voice. I do however acknowledge that my experience as an action learning facilitator does provide me with insight that can be seen as a liability or a benefit when interpreting findings. In Phase Three of the research to overcome potential bias interpretive stories were introduced as part of analysis. Interpretive stories were a joint effort between the participants and myself. After the in-depth interviews were held, I transcribed the interviews word for word and then interpreted the results by writing an interpretative story for each participant. In addition, in Phase Three I introduced two peer reviewers to reduce researcher bias. The first peer reviewer contributed to the interpretive stories by discussing the themes that they saw in the transcripts with me. By having two people (myself and the peer reviewer) analyse the transcripts helped to create a more insightful interpretative story to be sent to the participant for member checking. A second peer reviewer read the interpretative stories with the aim to identify the Hoggan’s (2016) typology of transformative learning. This helped me analyse the extent of transformative learning. The introduction of peer reviewers enabled me to share my own insight and to hear others’ insights and to see if there were any overlapping thoughts or contradictions. In addition, I used multiple sources of data for the five stages of data gathering over a period of four years from 2015-2018 from different programmes with a different sample in each year, supporting crystallisation.

The subject of how to write up the results of social science research is not new (Gilgun, 2005). In considering my voice in this present study I had a “crisis of representation” (Sandelowski, 2003, p. 331). Was I just to record the participant’s BDAL experience or should I give it my voice? I struggled because I wanted to remain free from bias as an action learning facilitator, whilst at the same time remain true to the writing up of qualitative research. I did write up

notes for myself in a researchers journal that helped me note changes in myself and how these changes could potentially impact this present study.

The researcher's voice is defined as "the author's personality within the manuscript" (Brenner, 2014, p. 3), which consists of the diction, syntax, sentence variety, sentence structure and paragraph structure. I chose to write in the third person in the study, which means that the writing style was sometimes in the passive voice. The reason for this choice is that academic and business writing still weights heavily in the third person and as I am a management development consultant, I am accustomed to this writing style. Furthermore, writing in the third person added to my ability to maintain an objectives distance from the participants when I interpreted their stories. However, I have still included my voice in the rich-described interpretative stories, where appropriate (Gilgum, 2005). In addition written language is "populated with intentions" (Bakhtin, 1981, p. 293) and researchers influence any piece of writing, irrespective of the voice in which they choose to speak and the degree to which they include the voices of the participants whom they research. Mowrer (1932, p. 281) remarked on this when he concluded that "facts are not born full bloom to be plucked by anyone. In every perceptive experience there is an infinite number of observations which might be made but which are not. What the individual sees is determined in part, at least, by what he [sic] is trained to observe."

Regarding data generation, I was surprised that the participants were so willing to take time to produce hand-drawn images however it proved to be an invaluable form of data as it gave the participants the lexicon to explain their individual and personal development as well as the struggles that they experienced during BDAL. BDAL can be an emotional experience for many participants and the hand-drawn images were able to capture the emotions. The hand-drawn images also helped me as I had an impression before I started the in-depth interviews. The hand-drawn images also helped define what questions I could ask as the first interview question was about their hand-drawn images. This first question also helped the participant and myself to ease into the interview.

I used Hoggan's (2016) typology to generate the in-depth interview questions which I changed very slightly from the pilot Phase Two understanding, to Phase Three meaning. I also had to take into consideration that each in-depth interview was different from participant to participant as they all had different experiences in their teams.

As the research methodology was uncertain it created unease for me regarding the next step. In terms of the data analysis I was faced with pages and pages of transcripts, which was very overwhelming. When researching how to analyse narratives I found the process of going straight from stories to coding not aligned to the narrative approach. To solve this dilemma I include interpretive stories which were rich descriptions of the BDAL experience and helped to provide additional insight to the research. I also found the thematic maps and the thematic diagrams helpful in organising my thinking.

### **3.11 SUMMARY**

This chapter described the qualitative research with the chosen research methodology of narrative inquiry congruent to the research philosophy and paradigm of this present study. The five phases of research were explained as well as the samples, data gathering and analysis for each of these phases. The analysis of Phase Three data consisted of two sections, namely; moving from the transcripts to the interpretive stories and then analysis of the interpretive stories into basic, organising and global themes completed via thematic analysis and illustrated using thematic maps and thematic networks. The importance of crystallisation was emphasised throughout the data gathering and analysis in Phase Four to gain a deeper and richer understanding of the integration of individual transformative learning into BDAL. The chapter concluded with a section on quality control.

## **CHAPTER FOUR: INTERPRETATION AND DISCUSSION OF THE DATA GATHERED FROM THE INTERVIEW TRANSCRIPTS PHASE THREE**

### **4.1 INTRODUCTION**

This chapter orientates the reader as to how the interpretive stories were written and the experience of drawing hand-drawn images. The result of the in-depth interview was that there were pages and pages of transcripts (including hand-drawn images), which the researcher had to make sense of. This chapter guides the reader on how the researcher moved from transcript to interpretive stories. .

Furthermore this chapter answers the research sub-question (Q1): To what extent did participants experience individual transformative learning during BDAL? It was imperative to determine if there was transformative learning before the interpretive stories were analysed in Chapter Five as answering this present study sub-question could give insight into the other research sub-questions.

The chapter is organised into three sections: the application of McCormack's (2000a; 2000b) lenses; reflection on hand-drawn images and participants' self-analysis on their level of transformative learning. In the first section, McCormack's (2000a) lenses were applied to examine the information in the transcripts using the lenses of context, moments and language. These lenses provided additional insight into understanding the participant's experience so that the researcher was able to write the interpretive stories.

In the second section, reflection from the participants on their hand-drawn images was discussed to confirm the researcher's interpretation of the drawing experience. The hand-drawn images gave the participants the language to articulate their learning, which was essential in writing up the interpretive stories. The use of hand-drawn images does not respond directly to the research question but adds to the understanding of draw-write-tell method within qualitative research (Angell, et al., 2015).

The third section addresses the research sub-question: To what extent did the participants experience transformative learning? Transformative learning was identified by the researcher using Hoggan's (2016) typology (outcome) of

learning and three (breadth, depth and relative stability) that define transformative learning. The first criteria was *breadth*, where examples of changes were transferred and applied in broader areas of the participant's life and not only limited to the workplace. For example, breadth of an outcome is seen at home and the workplace. The second criterion was *relative stability*, which implied that the outcome was 'irreversible and permanent' (Hoggan, 2016). Relative stability in this present study was implied based on the research timelines as the interview was held at least ten months after the SMDP. The third criterion was *depth*, which included the impact of the change and the degree to which it affected a particular outcome (Hoggan, 2016).

## **4.2. APPLICATION OF MCCORMACK'S LENSES**

McCormack's (2000a) lenses offered a framework for the analysis of narrative data and supported the writing up of interpretive stories. This aided the researcher in demonstrating that the reported findings were situated in the original data.

One of the benefits of applying McCormack's (2000a; 2000b) lenses was that it allowed for *multiple listenings* (Dibley, 2011) as each lens had a distinct way of examining the information in the transcript and this contributed to the understanding of the participant's experience. Murray (2000) explains this as *levels of analysis* that enabled the researcher to show different meanings in stories. The three lenses of context, moments and language are addressed in this section as they are used as an analytical tool to decipher the transcript. The lenses were then applied to the writing up of interpretive stories (Appendix 8).

### **4.2.1 The Lens of Context**

The lens of context addressed the situational context of the participant (Rooney & Whitton, 2016). On the one hand, context is important in interpreting the findings as it allows for an audit trail and replication of the research (Patrick, Scutchfield & Woolf, 2008) whilst on the other hand, the lens of context sets the scene for each interpretive story so that the participant felt heard by the researcher. In this present study, the lens of context was noted by the

researcher and written into the interpretive story so that each interpretive story includes the context of the participant's experience.

In this present study, the researcher is an action learning facilitator herself, which meant that the participant did not have to explain background information on neither the learning process nor terminology, as the researcher already had this understanding. As a result, the rhythm of the storytelling was not disrupted and the context could be explored in depth.

There are three critical dimensions when trying to understand experience: significance (past), value (present) and intention (future), all of which were applied when analysing the lens of context (Carr, 1986). Why the participant attended the programme (past) is of particular interest as participant readiness can be seen as a condition that exists within the participant even before the program starts (Raelin, 2006). An example of why the participant attended the programme (past):

*I was nagged by my line manager, she actually asked me 3 years ago to do it but I used an overseas trip as an excuse not to go. One of my friends in Johannesburg did the course and we are very similar and I could get a better idea in terms of impact on my time and family. He had an amazing experience. I said I will do it. I was so glad to do it as it was really a good experience. You have to have the right mind-set to do the BDAL. I worked hard (Rhys-P3).*

All of the responses regarding the significance of why the participant attended the programme were included in each interpretive story and written up as part of the introduction to the story.

An example of why a participant was committed to BDAL was seen in Logan's-P3 transcript where he mentioned that he was personally invested in the BDAL topic on healthcare and it was not just a business challenge for him. One of Logan's-P3 family members died from lack of healthcare. "*She had a respiratory tract infection and she died from it, she died from it and this is something close to home.*" This example was not linked to the research question but was included in the beginning of the interpretive story so that Logan felt heard by the researcher. In addition it emphasised the motivation to work on the BDAL project. It may have also been one of the reasons why Logan-P3 wanted to participate in the research as he mentioned that he was passionate about the

topic and learning, which was evident when he said “*my love for something like this showed.*” The context lens of focusing on the significant (past) experience provided insight into the sub-research question (Q2): What are the preconditions that create an environment for transformative learning during BDAL?

Participants also had stories that illustrated the value (present) of the experience and this included how their personal context influenced their BDAL experience and increased the relevance and motivation to work in a set. For example, Mbali-P3 mentioned that she had an abusive childhood and wanted to change who she was. In the interview she said:

*We had some abusive issues at home as a child, and we were all very, very traumatised as children and we’ve come out of it quite broken. I always saw myself as that broken person. I struggled to separate that from my identity. BDAL has helped me do that. I no longer see that broken person (Mbali-P3).*

An additional example of value was from Odwa-P3 who mentioned that the BDAL learning gave her courage to get a divorce and make major life changes.

*I’ve been in a relationship for a long time and now, this year, I have said I can’t anymore. In just under two weeks I’m going to ask for a divorce. I just want you to get an insight on the extent this has changed me. Something that I considered previously but never acted on (Odwa-P3).*

These examples emphasised what was learnt during the programme (past), and where changes have been made since attending the programme (present). The context also included what participant’s plan on doing (future). For example, Louie’s-P3 interpretive story includes her company going through a restructuring process, which sets the scene for the in-depth interview. It also indicates the stress the participant was under at the time of the interview and despite this she was still willing to share her story.

*Some of the participants who attended the programme are no longer working for the company and the others who stayed in their position are working long hours and are over-stretched (Louie-P3).*

Overall, the context showed why participants were willing to work on the BDAL project as they had a vested interest in the outcome due to their specific contexts. The past, present and future were all included in each interpretive story, which gave the story a beginning, middle and end. The lens of context

was relevant as it gave the researcher meaningful insight into the participant's experience.

#### 4.2.2 The Lens of Moments

The lens of moments is when the participant had a 'realisation' during the retelling of their experience (Rooney & Whitton, 2016). This realisation is insight, colloquially called an 'aha' moment. It results when there is a new interpretation of a situation and points to a solution to a problem (Sternberg & Davidson, 1995). Laukkonen and Tangen (2018) concluded that a self-reported measure of an "aha moment" is methodologically and theoretically sufficient. In this present study, the participant was able to self-report the "aha moment" during the interview as a result of self-reflection during the hand-drawn image and the interview itself. The lens of moment helped the researcher to interpret and add meaning to the interview transcript.

The 'aha' moments were often about an event that took place during the BDAL experience that were realised during the interview (McCormack, 2000b). For example,

*I thought to myself that I need some time just to process this and to say, maybe, a few different things that I have learnt and how do I apply them and then what about things I want to take further and start to concentrate on. I would like to sort of crystallise what I have learnt and give myself the space to do that, and I would like some coaching on what paths I can develop within my work (Luke-P3).*

'Aha' moments that took place during the interview were a result of self-reflection. In noting the lens of moments, there were many instances during the interviews where the participants became reflective in an attempt to explain their experiences to themselves and the researcher. As such, participants often repeated aspects of their story while giving additional information, which involved reflection and reinforcement of the learning (McCormack, 2001). Moments that include reflection and reinforcement are important as they contribute to making the learning visible to the participant. A practical example is from Prisha's-P3 interview where she emphasised the benefits of reflection:

**Reflect:** *I want to say the biggest benefit was re-living everything, sitting here today (Prisha-P3).*

**Reinforce:** *I actually also want to say that I probably have the added*

*benefit....so I actually want to say that I probably got an added benefit by thinking again about things (Prisha-P3).*

From the literature, reflection is a core aspect of both action learning (Trehan & Rigg, 2012) and transformative learning (Mezirow, 1991). It was evident from viewing the transcript through the lens of moments that the in-depth interview and hand-drawn images were an additional opportunity for the participant to self-reflect on the BDAL experience and make the moments of insights visible. This emphasized the value of reflection.

Furthermore, 'aha' moments were illustrated when the participant came to a realisation during the interview. For example, Luke's-P3 learning was around assertiveness and dealing with others.

*I think that the one thing that I really did learn is just how attuned to justice I am, unfortunately I had a bad experience from a team point of view in that a lot of the team members were not pulling their weight and because of that I got very, very upset. I also realised that I don't sometimes address issues directly. Which is a bit of a weakness. I think that I have also grown since the BDAL in that I much more inclined to speak to somebody about something that I am unhappy about (Luke-P3).*

There are different opinions in the literature on how transformative learning starts and one of these views is that 'aha' moments can be seen as the start of transformative learning (Henderson & Bastnagel cited in Denmark and Paludi, 2018). In this present study the 'aha' moments made the individual learning visible to the participants and these 'aha' moments were included in the interpretive stories. This was also reinforced when the participant read their interpretive story during member-checking. The researcher and the participants themselves were able to gain valuable insights into the BDAL experience due to "aha moments."

The researcher recognised that time had passed since participants had completed their BDAL and that memory "is grounded in what is tellable" (Atkinson & Coffey, 2003, p. 118) and "shapes and orders past events" (Chase, 2005, p. 656). The stories are information from the past, but not necessarily about the past (Bochner, 2007). What the participants see as true today may not have been true at the time of the event. The purpose is not to produce accurate memories, but to provide an opportunity for reflection on the meaning these events have for the participant (Polkinghorne, 2005).

### 4.2.3 The Lens of Language

Language is central to the analysis of the transcript as it constructs the participant's identity (Fairclough, 1992 cited in Grant, 1996). One of the challenges of transforming the BDAL experience into language is that the participants are not always able to articulate their individual learning. Despite this, language is the primary approach in accessing a participant's experiences (Polkinghorne, 2005).

Language helps to identify the characters in the BDAL experience and what the participant felt about them. Identifying the characters is one of the key components of narrative inquiry (McCormack, 2000a); these characters include line managers, set members, the action learning coach and family members. The characters are important in this present study as they contribute to creating an open, trusting, and supportive learning environment necessary if transformative learning is to take place (Lamm, 2000).

The researcher identified which language characteristics from the transcript impacted on the interpretation of the story (McCormack, 2004). The lens of language includes what was said, how it was said and what was unsaid, and this was built into each interpretive story (McCormack, 2004), thus providing depth and understanding to the BDAL experience. Examples of what was said, how it was said and what was unsaid is explored in more detail.

#### 4.2.3.1 What was said

In analysing what was said, the following was noted: groupings and phrases. An example is: "*of course*" and "*it was natural that.*" This helped the researcher hear when the participant thought that what they were about to say was obvious to the listener. Negative experiences were noted: "*unfortunately I had a bad experience from a team point of view*", and frequently used words such as "*frustrated*," were noted so that the researcher could understand the feelings that took place when the individual interacted with the set. When emotions were high it was normally due to conflict in the set. However emotions are an enabler of transformative learning (Taylor, 2000).

Words that assumed common understandings such as "*syndicate*" (BDAL set/team), "*aha-moments*" and "*sponsor*" we noted. As the researcher is an

action learning facilitator a lot of the words that were mentioned by participants were linked to terminology that is used in the management development programme itself. Words that were uncontested knowledge, for example, “*you know*,” words that make space for thought such as “*uhm*” were noted and this helped the researcher see that the participant was thinking or struggling to articulate their point. Words that are linked to the research question, such as “*change, transformative, BDAL, personal learning and development*,” were also noted in the researcher’s notes as these words mostly linked to the end results of the programme and were normally outputs from the programme. .

Sometimes participants would self-evaluate and say, “*I am waffling now*” which showed that the participant was self-aware of their communication skills. Reflecting words such as “*let me think*” and pauses were used when the participant was trying to work something out. These words were not written into the interpretive story; however, they gave the researcher the indication that reflection was being applied by the participant during the in-depth interview.

Reflection was beneficial to the participant as meaning from an experience is often created from hindsight (Polkinghorne, 1995). At other times, the researcher had to summarise the participants’ point in an attempt to get the person to move onto the next point so as to ensure that the research questions were answered, as participants often went off track in answering the question from the interview guide.

What was particularly useful to the researcher’s understanding was that through the use of language, the participants were able to communicate their similarities and differences in comparison to others (Gee, 1990; Temple & Young, 2004). An example was when participants compared their set to other sets in the programme, or their own learning in comparison to other participants:

We did not have horror stories in our group and we did not experience what some other groups did (Logan-P3).

This comparison gave the researcher insight into the sense of competition between the sets as participants compared themselves to other sets in the narrative. Mostly the participants that did not have ‘horror’ stories, as a whole, volunteered for this study. These participants that volunteered felt lucky that they were in the set they were in, as they mentioned that not all sets had a

positive experiences.

The participants were generally positive about their BDAL experience, but there is an indication that not all participants felt the same. This insight influenced the researcher's interpretation of the importance of sets. Consequently, the participant's experience of working in a set was written into each interpretive story. The researcher included as much detail about the set itself in each interpretive story as the set was the vehicle in which BDAL took place. What was thought provoking is that participants all had different stories to tell. The researcher, when writing each interpretive story, wrote it from each participant's perspective without trying to create a common thread between stories. This showed that the BDAL is an individual learning experience for each participant and that no two stories were the same. Despite this, participants mentioned that their interpretive stories could be shared with other participants in a SMDP so that understanding is gained around how BDAL is applied and that the challenges in BDAL are a necessary part of the learning process.

*I wish someone had shared their story with me while I was on the programme (Mark's-P3 comments from member-checking).*

In conclusion even though *what was said* is different in each interpretive story, there is a common message for all participants who experience BDAL as most participants find the process challenging.

#### **4.2.3.2 How it was said**

The analysis of how it was said includes the 'how' and 'why' of the events, not simply what was said (Riessman & Speedy, 2007). What is important to recognise is that an interview is never a simple process of sitting down with a participant and asking them to tell their story. The narrative inquiry approach employed in this present study tried to understand how participants experienced the BDAL and whether they experienced transformative learning. How the participants talked about the events during BDAL and whose perspectives they mentioned also helped the researcher to make sense of events.

Language is a medium for communication and an expression of self (Gabryś-Barker & Otwinowska, 2012), and analysis in narrative inquiry involves the interrogation of language. Language helps participants represent their sense of

self. The lens of language permitted the researcher to see how the participant “speaks of herself before we speak of her” (Brown & Gilligan, 1992, pp. 27-28). An example of this is when Mark-P3 said, “*I get emotional about it*”, and the researcher could hear the pause in his voice when he said this, thus emphasising that BDAL has an emotional context, which was added into each interpretive story. The researcher then included the emotion that was heard in the interpretive stories. Due to this emotional context in BDAL, participants can experience stress, anxiety and high levels of frustration, which can threaten the learning process (Robertson & Bell, 2017).

The researcher noted that some participants avoided personalising their BDAL experience, which could be a form of coping mechanism applied to deal with anxiety around the BDAL experience. There were many instances in the interview where impersonal pronouns were interchanged, for example, “I” was interchanged with “you.” The researcher believes that participants were not conscious that they were doing this. An example of this can be seen in Logan’s in-depth interview where he used the word “you” in many instances, such as “you have an idea of each person.” Disassociation in the form of language using the word “you” is a form of defence strategy. The American Psychiatric Association (1994) describes disassociation as when the person deals with a stress or with a breakdown in perception of self. In the in-depth interview, a few participants used the word “you” even though they were talking about themselves. The use of “you” instead of “I” can indicate a generally admitted truth or a personal opinion that the participant hopes to share (Laberge & Sankoff, 1979). The use of the word “you” could be a habit or an unconsciously applied defence mechanism to protect them from feeling anxious (Oldham & Kleiner, 1990). Defence strategies were valuable insight as the researcher was able to write how the participant dealt with anxiety created during BDAL into each interpretive story.

When participants showed that they had gained insight into their behaviour, their language changed, and they used the word “I”. For example:

*I was so stuck in my way of dealing with things (Sandy-P3).*

*I avoided confrontation at all costs (Luke-P3).*

This showed that the participant was aware of their strengths and weaknesses

as a result of the BDAL experience, which emphasized that self-awareness had taken place. This self-awareness was written into the interpretive story, which is relevant as self-awareness is one of Hoggan's (2016) outcomes of transformative learning.

Participants also used phrases such as: "*it was big*", "*it was huge*" and "*this was the key*" in an attempt to explain the extent of their learning and the impact the BDAL had on them. They were trying to indicate to the researcher the importance of this learning and the deep impact it had in their lives. This language indicated to the researcher that the BDAL had made a significant impact on the participants and this impact was written into the interpretive story.

Many participants used the word "*stuff*" when they assumed that the researcher understood what they meant or when they did not have the correct words to describe something. Sometimes the researcher had to explore what they meant by the word "stuff" and other times this was left for a later question to be addressed in the interview guide. This may have been an indication of the difficulty with language use in explaining learning.

When Logan-P3 used the word "I", he emphasised his current situation back at work. For example, "I am thinking strategically, I believe." When he makes a general statement, he uses the word "we", for example, "we are the future leaders." Logan's feedback via member-checking on the interpretive story was that he agreed with the researcher's explanation in the interpretive story. This finding supports Billon's (2017, p. 732) view that basic self-awareness is reflected in the use of the first-person pronoun. Hoggan (2016) includes the shift in the sense of self as one of the outcomes of transformative learning. Self-awareness is an outcome of transformative learning and the language used during the in-depth interview provided insight into this outcome.

Another defence strategy seen in the interviews was humour. The American Psychiatric Association (1994) confirms that people apply humour by emphasising amusing topics and laughing. For example:

*(Laughing) It was very tough (Carmen-P3).*

*I am naturally competitive. So I... And I'm very ambitious so I have clear goals. Five, ten, we know... I have goals (laughing) (Sally-P3).*

The use of humour may have been due to the anxiety that the BDAL

experienced caused the participants, once again emphasising the unease of learning. The use of the two defence strategies, disassociation and humour, was therefore evident in the in-depth interviews. This gave the researcher insight into the unease that the participant felt during BDAL, which was written into the interpretive story. To make the participant feel more at ease during the interview, the researcher tried to create a relaxing environment by emphasising that there were no right or wrong answers and that the participants would remain anonymous. Even though participants volunteered to be part of this present study, they sometimes found it difficult to express how difficult the BDAL was for them and the amount of frustration they felt during the BDAL process. Coutu (2002) emphasized that learning is a cause of frustration for groups and individuals, which was evident in these transcripts.

Prisha-P3 wrote the words “*Blah Blah Blah*” on her picture, which represented how the set wasted time by talking and questioning too much. In the interview, she confirmed that this was one of the reasons for her frustration whilst working with the set. Prisha’s-P3 picture is represented in Figure 4.1. The hand-drawn image is evidence of the sense of frustration experienced during BDAL, as the participants were so involved in taking action and completing the project rather than taking a step back to make sure all set members were working as a team. In addition, the pictures indicated frustration due to all the questioning and reflection that took place as part of the BDAL process. The findings, in terms of language, confirm that most participants experienced a sense of frustration during BDAL.



Figure 4.1 Blah Blah picture (Prisha’s-P3 hand-drawn image)

Odwa's-P3 transcript is important to mention in this section on language, as it was difficult to transcribe. She paused when thinking and used words such as "um, I think, you know." In addition, she suddenly added in comments in the middle of a sentence and sometimes did not complete sentences. Her sentence structure was disjointed, but her thoughts around the concepts were clear due to her hand-drawn image. For example, she said:

*(Pauses) um, ja sometimes um, I think I learnt a lot through the process. Because I think um the boundaries weren't always set quite um, firmly. Um, because I always wanted to over-compensate. So um, I know I can't do this but I'm gonna try in any case. You know, I know I shouldn't go about this path, but ja, maybe if I shift things around so again giving more of myself um, you know because um, what happens is there's an expectation (Odwa-P3).*

As a result, Odwa's-P3 interpretive story (Appendix 8) includes very short sections in her direct words in bold, and the researcher's words are written in normal font:

***I am one who will always accommodate, accommodate, accommodate. Then I just said, you know what, this is it. Let's stop right there. I am no longer accepting this. This journey of giving all she has to others had to stop. The people in her life did not like the fact that she had started to put boundaries in place. People are selfish, and they had hard feelings and were unhappy when she was not available to help them all the time (Odwa's interpretive story).***

Writing Odwa's story was a challenge for the researcher as she spoke a lot in the interview and her sentences were short. It felt as if she was reaching her own conclusions as she spoke aloud. There was not a lot of text to transcribe. However, when analysing the text as narrative inquiry is about analysing whole sections of text. Even though this participant's story was difficult to write, she had solid insight into herself and the value the BDAL experience provided her.

There were a few participants whose first language was not English, which sometimes presented a challenge when transcribing the interview, as their accents were difficult to understand. For example, Louie-P3, Fatima-P3 and Sam-P3 spoke with heavy accents, which made the listening when typing up the transcript a challenge. The use of hand-drawn images helped with the language barrier, as the participant was able to draw the experience rather than only speak about it.

When participants repeated some of their insights and used the same words, it signalled the end of the interview since that the participant did not have further insight on their experience to share. For example, Logan-P3 started off stating that sustainability was his key insight, and then, towards the end of the interview, he started repeating the concept of sustainability and discussed the shift from operational to strategic thinking. The repetition was a signal that the story had come to an end, and this was then written into the interpretive story which has a beginning, middle and end.

When analysing the linguistics, it was noted that most participants applied metaphors when they did not have the language to express themselves. Metaphors are useful in understanding the participants' text as "goaded the data" (Richards, 2005, p. 171) and are "devices of representation through which new meaning may be learned" (Coffey & Atkinson, 1996). Metaphors provided the language for participants to tell their story and ensure that the reader understood the message. As already mentioned, Hoggan (2016) concludes that the change in self is often emphasised through metaphors as they help explain the participant's life. Examples of metaphors are:

Mbali-P3 drew archetypal images: "*The butterfly, that's significant transformation.*" It is a whole metamorphosis and a cycle that depicts the extent of her change.

When talking about avoiding an issue, Carmen-P3 said the following: "*Not to the point where I pull a blanket over my head.*"

Sandy-P3 drew a door opening to represent the opening of her mind due to new opportunities being presented to her and added: "*Whole new world opening up, new opportunities, different ways of doing things. Not taking away from where I come from.*" Overall, metaphors provided a useful means to describe the BDAL experience, as these made learning visible and helped in the writing of the interpretive story.

#### **4.2.3.3 What was unsaid**

What was unsaid in the interview was also noted, as participants left out details or exaggerate events (Ezzy, 2000). For example Carmen did not mention her line manager at in her story, so the researcher is unsure if this was a supportive

relationship. However, it was difficult to always determine what was unsaid, and the researcher had to pick this up from the hand-drawn images and metaphors and ask additional questions on these aspects during the in-depth interview.

When listening to the recordings of the transcripts, the researcher noted that some participants tried to use the business language learnt from the programme. For example, the researcher perceived that Logan-P3 tried to show what an effective manager he has become since the BDAL experience. He indicated this when he constantly used the word “strategy” in the interview which may be an indication that he is trying to show how much he had learnt. This may be an indication that he was trying to show that he had learnt the concepts from the SMDP but was still unsure of himself. The following was an extract from his interpretive story:

*Logan volunteered to be part of the interview, as he wanted to determine if he had identified the **right things** from a learning perspective during the BDAL. The words “right” implies that he was unsure of himself (Logan’s interpretive story).*

All non-verbal communication such as pauses, sighing and laughing were included in the transcript, which gave the researcher insight into how the participant was feeling about the content of the interview and the interview experience. However, it is difficult to make assumptions about what was unsaid, and the research supports Trahar’s (2009) comment that participants tended to tell the story they want to tell or even the story they felt that the researcher wanted to hear.

#### **4.2.3.4 Summary of the lenses**

In conclusion, the additional insights gained through the application of the lenses helped add depth in understanding the participants’ experience which assisted in writing the interpretive stories. Whilst the analysis of the lenses do not respond to the research questions directly, they are essential in listening to the transcript. If coding had been directly applied to the transcript, the depth of interpretation might have been lost.

Due to the lenses, the researcher was able to explicitly state insight in each interpretive story. Once the researcher had completed multiple ‘listenings’ of the transcript using McCormack’s lenses as a framework, these lenses were used

to write the interpretive story. To ensure that there was reduced researcher bias, interpretive stories were sent to the participants who member-checked their own interpretive story, which included the researcher's insight gathered from the lens of context, moments and language.

This section of lenses aimed to prove authenticity and conformability by providing an audit trail. The use of a lens context, moments and language support McCormack's (2000b) comment that one lens alone would not have been enough to help interpret the transcripts as the multiple viewpoints added richness to narrative inquiry.

### **4.3 REFLECTION ON THE HAND-DRAWN IMAGES**

Reflection on the use of hand-drawn images is relevant as it contributes to the method of data gathering in narrative inquiry. Nossiter and Biberman (1990) conducted one of the first studies related to specific research on applying drawings as a research method where they concluded that drawings enabled participant honesty. However, there is a gap in the knowledge of the application of hand-drawn images as a data gathering method (Kearney & Hyle, 2004). In this section, the researcher reflects on the experience of drawing. In addition the section includes the participants reflection on hand-drawn images, as this was one of the first questions that the researcher asked the participant in the in-depth interview. The hand-drawn images themselves are analysed in Chapter Five; it is just the experience of drawing that is included in this section.

The participant's experience of applying hand-drawn images as part of data gathering was included at the beginning of each participant's interpretive story so that each participant could confirm the researcher's interpretation of the drawing experience via member-checking. During the in-depth interview, one of the questions in the interview guide was: "Can you tell me how you experienced drawing your learning? Was it easy/hard, how did it help/hinder in articulating your ideas?"

#### **4.3.1 Initial resistance to drawing hand-drawn images**

Nossiter and Biberman (1990) concluded from their research that participants found drawing fun. In contrast to this, Kearney and Hyle (2004) found that not

all participants enjoyed drawing. This present study found that some participants were initially resistant to drawing hand-drawn images:

*I wanted to phone you and say, why do you want me to draw? I don't like drawing, it does not work for me. Can't I write it? I was very put out (Mwali-P3).*

Even though some participants were initially resistant to drawing, once they started drawing they found it easier to draw the image. It seems it was the initiation of the hand-drawn image that was difficult for them:

*She found the drawing **difficult in the beginning**, she was not sure where to start. She went through her notes from the programme and the drawing became easier to do as the learning **stood out for me** (Charmaine's interpretive story).*

Drawing takes time and effort (Hopperstad, 2010), which may have been one of the reasons why drawing was initially difficult for the participants. In addition, some participants felt that they could not draw as they did not have the skill, hence the initial resistance. Previous research concluded that adult participants mentioned that they cannot draw (Guillemin, 2004; Vince & Warren, 2012). One of the reasons for showing resistance to drawing could be the perceived lack of drawing skills:

*It was difficult because I don't draw. I love my figures, I love my facts. I can't draw. How do you draw a wall? There must be a door because it has opened, so how can I do the door? And how do you show it's going in and not going out, forward? (Sandy-P3).*

Sandy-P3 mentioned that she struggled to draw an 'open door' (Figure 5.20) due to the lack of her artistic ability. Therefore, this study supports the findings from Kearney and Hyle (2004) who mentioned that some participants were resistant to drawing due to the lack of artistic ability. However, it is not the artistic skills that are necessary in this present study, rather the meaning and the explanation behind the image that adds value. This was expressed in the researcher's initial instruction to the participants and could be emphasized in more detail to reduce the initial resistance around drawing.

#### **4.3.2 The benefit of hand-drawn images**

Participants have access to their own experiences, but they are not always able to articulate these experiences which can impact on the interpretation and understanding of experience (Polkinghorne, 2005). Hand-drawn images can

express that “which is not easily put into words: the ineffable, the elusive, the not-yet-thought-through, the subconscious” (Weber & Mitchell, 1995, p. 34). Hand-drawn images can help make the experience coherent. After the experience of drawing, most participants confirmed that the practice of drawing hand-drawn images helped them to articulate their learning experience:

*I had to re-live last year, if I can say it like that. Actually understanding the outcomes and my growth areas. At the end it was fun (Prisha-P3).*

One of the reasons why hand-drawn images are beneficial is that the participants had to really think about their learning experience:

*Drawing pictures triggers a little bit of that sub-conscious stuff. I had to really think what images represented my journey. It forces you to think step by step. You actually have to relive every moment. I had to spend time and think. It's challenging though. I thought about it a lot (Mwali-P3).*

Reflecting on the BDAL experience through the medium of drawing proved valuable to the participants as it provided an opportunity for reflection. With the introduction of hand-drawn images before the in-depth interview, the participants had time to reflect on their learning, access the BDAL experience and provide rich data in the in-depth interview:

*The biggest benefit of drawing the pictures was reflecting on everything that she went through last year and understanding the outcomes at the end of it. **I mean you lose it so easily if you don't practice things. You walk out of the programme and then tomorrow you're back in your same ways. So, I want to say that I probably had an added benefit by thinking again about things. Actually, reliving the moments again is the key.** The drawing had the benefit of creating a **reflection period to reinforce the learning** (Prisha's interpretive story).*

Other research has found that hand-drawn images helped the participants to illustrate ideas in a more tangible and specific way than words (Broadbent, et al., 2006), hence the benefit of applying the hand-drawn images before the in-depth interview. The use of hand-drawn images confirmed that drawings enable the participant to ‘show’ the experience, rather than ‘tell’ the experience (Kress, 2003). These findings support Guillemin (2004) who concluded that the use of drawings, as a research method, increased the researcher's interpretations in diverse ways to understand an experience.

Whilst striving to draw the image, most participants were able to formulate and articulate their learning experience through reflection on the experience:

*She enjoyed the drawing process, as she consciously needed to make time to reflect. Reflecting helped her to listen and be quiet. She felt that reflecting was not just delving into her experience bank but also questioning her past behaviour and comparing it to the current behaviour (Sandy's interpretive story).*

Sandy-P3 drew the picture of an 'open door' multiple times, as she wanted the drawing to show movement and change (Figure 5.20). She struggled to draw her picture; however, it was the explanation of the concept of movement that added depth to the conversation during the in-depth interview. Through the effort of trying to draw pictures of their learning, participants were forced to spend time reflecting on what they wanted to draw and how they would represent their learning in a hand-drawn image.

The struggle and time it took to draw benefited the participants, as through the struggle they gained the opportunity to reflect on their learning. This gave the participants an opportunity to reflect and think deeply about their learning. The findings support Löffström and Nevgi's (2014) research as they confirmed that hand-drawn images are a prompt to stimulate the participants' reflection on their learning and helped remember the BDAL experience:

*I would not have been able to just come out right with the learnings and the experiences if you had just asked me in the interview without the drawing. I actually found it a nice way of doing it because it helps you crystallise your thoughts better and it is more visually impactful than writing a passage of learnings (Julian-P3).*

Another benefit is that the participants were able to reflect on their emotions regarding the BDAL experience in their hand-drawn image. Sometimes participants do not want to reveal their emotions as they can be seen as uncontrollable, frightening or shameful (Shepherd, 2016), hence the benefit of drawing the emotions (See the 'library' example in Table 4.1 where emotions were drawn in the picture in the form of jagged lines).

Another benefit of drawing is that the participant could tell their story through drawing. In Figure 4.2, Mbali-P3 drew a very detailed picture of a changed person. She told the researcher that she traced the pictures so that they would look good.

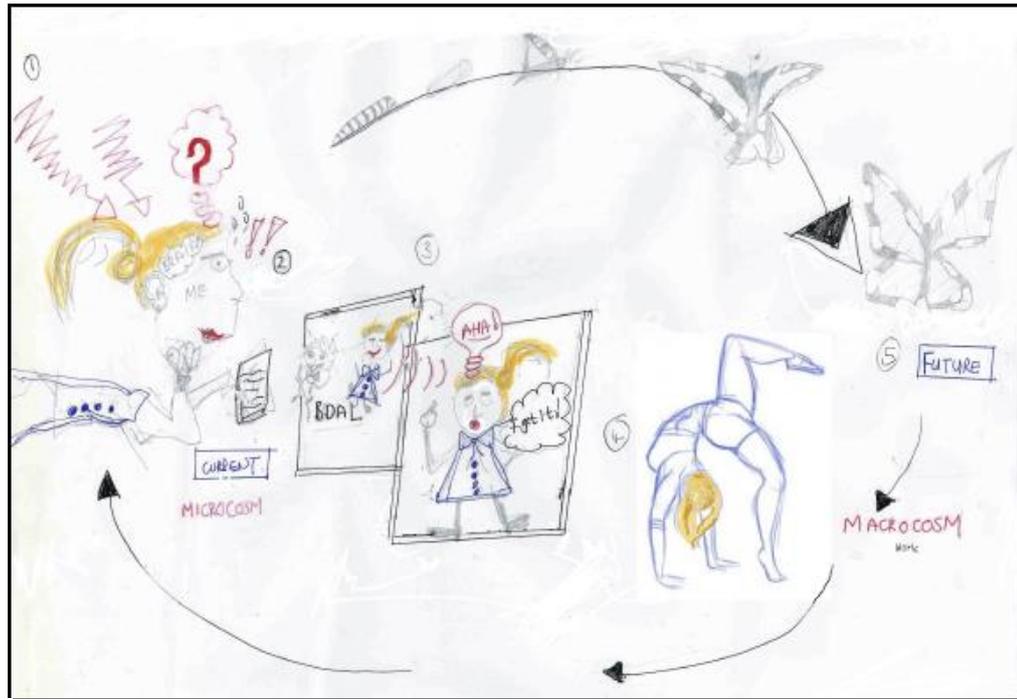


Figure 4.2 A changed person (Mbali's hand-drawn image)

Even though Mbali-P3 tried to create a 'perfect' picture of change, looking back at her hand-drawn image and her replies in the in-depth interview, the responses were authentic. The image of 'perfect' learning was again emphasised by this participant during member-checking where she corrected all the grammar and the repetition of words in her story (See section on member-checking). In conclusion, Mbali-P3 took extreme care in working towards 'perfection' as the BDAL experience had a significant impact on her life, and the hand-drawn image was an effective way for her to express the value of the experience.

Vince (1995) concluded that the images themselves enable analysis but the discussions around the images provided context, which can be analysed. The drawings therefore gave both the researcher and the participant insight into the BDAL experience.

### 4.3.3 Use of colour in drawing

The use of colour was varied amongst drawings as pen, crayons or felt-tipped pens were used. Colour indicates the importance of a specific element (Kress & Van Leeuwen, 1996). Some drawings were only in pen while some included partial colouring. In others, the full picture was in colour. Art therapists disagree

as to whether the emotional meanings of specific colours are universal across different individuals (Furth, 1988; Lev-Wiesel & Al-Krenawi, 2000). In this present study, the findings showed that colour was used to emphasise a point, typified in Nsikelelo's-P3 drawing where she used red in her spiral of focus to emphasise energy in Figure 4.3. Furth (1988) concludes that red can be attributed to expressiveness in drawings.

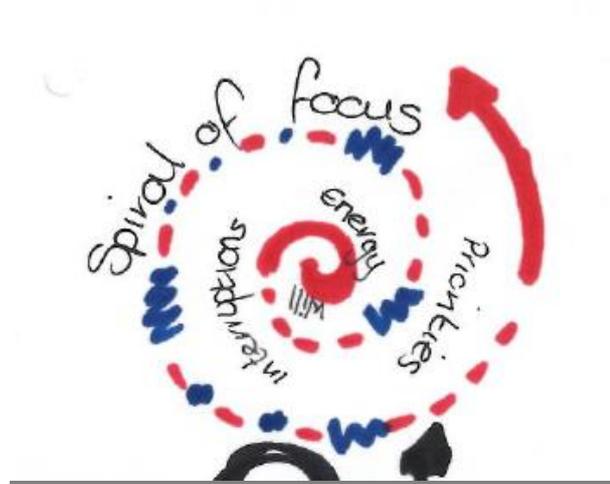


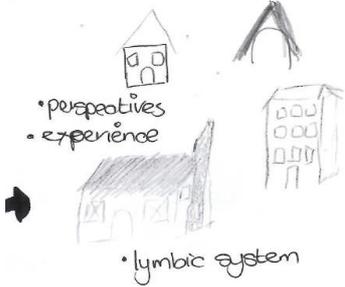
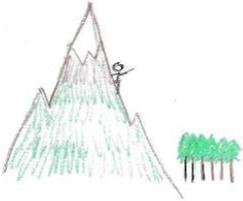
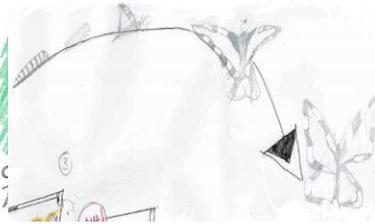
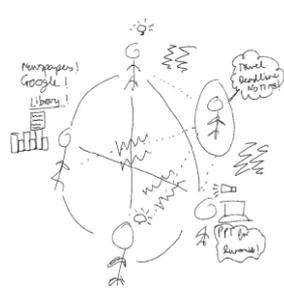
Figure 4.3 Colour to emphasise elements (Nsikelelo's hand-drawn image)

Overall, the use of colour was noted by the researcher when asking questions during the in-depth interview. This was subsequently written into the interpretive story as colour in the drawings was used to emphasise a certain point that the participant felt was important.

#### 4.3.4 Metaphors to explain the learning

Examples of metaphors are seen in Table 4.1. Nsikelelo's-P3 drawings of "houses" represented the limbic system while Luke's picture of "not finding the wood from the trees" expressed divergent and convergent thinking. Other examples of metaphors included: Mbali's-P3 picture of the "caterpillar metamorphosing into a butterfly" emphasizing the change she felt she had experienced, Sandy's-P3 picture of a "mirror" represent the importance of reflection, Nsikelelo's-P3 "spiral" represented energy and focus, and Julian's-P3 "library" picture reflected all learning that took place whilst there was intense emotions.

Table 4.1 Metaphors

 <p>"Mirror"</p>	<p>"Limbic System"</p> 	 <p>"Spiral"</p>
 <p>"Wood from the trees"</p>	 <p>"Caterpillar"</p>	 <p>"Library"</p>

The metaphors that the participants shared in their drawings were a form of language to articulate their experience. Creating hand-drawn images that include metaphors is a powerful technique that brings to the surface unconscious attitudes, assumptions and emotions that create new insights into the problem (Vince, 2001). Ricoeur (1977; 1984) maintained that 'language expressions' such as metaphors add to the explanation of experience and allow for differentiation of experiences. Metaphors are valuable in trying to comprehend the world and for deepening understanding of the self and the world (Rodgers, 2016). Saljo (2002) confirmed that it is common in researching learning, development and communication to use metaphors. The actual concept that the participant is trying to describe is an abstract concept such as time, emotion and communication (Lakoff & Johnson, 1980). In this present study, examples of abstract concepts were drawn in the form of metaphors. However, metaphors can only capture the concept partially (Lakoff & Johnson, 1980), hence benefit of an in-depth interview where there was the opportunity to

explore the metaphors in detail. In conclusion, metaphors were a useful medium where the participants expressed a point regarding their BDAL experience.

#### **4.3.5 Drawing arrangement on the page**

It is also significant to view how the drawings were arranged on the page. The drawings were analysed using a visual vector, which is a diagonal line, an arrow or other aspects linked to direction (Kress & Van Leeuwen, 1996). Mbali's-P3 butterfly, Nsikelelo's-P3 spiral of focus, Mark's-P3 arrows, Charmaine's-P3 ripple effect, Sandy's-P3 open door and Odwa's-P3 system all expressed movement in their pictures, which could indicate that participant's see themselves as changed. The movement in a picture could potentially indicate deep learning, which is one of Hoggan's (2016) criterion for transformative learning.

It is worth noting that nobody drew just one image of their learning. Multiple images were drawn by participants, and this can indicate that participants see the BDAL experience as dynamic and having an impact on various aspects of their lives. The drawings tended to have a beginning, middle and end summarising the participants BDAL experience as a journey. The beginning, middle and end was written into each interpretive story.

#### **4.3.6 Words in the drawing**

The words that were written on the drawing were the 'write' component of the draw-write-tell method (Angell, et al., 2015). In analysing the drawings, it is valuable to note words that the participants saw as significant as they wrote these words on their hand-drawn images. Words such as: *limbic system*, *perceptions*, *microcosm*, *macrocosm*, *reflect on my truth not your truth*, *power of diverging and converging* were displayed. It can be concluded that these words were written on the page to draw attention to the learning. By including these words, the participants chose to place emphasis on the constructs or concepts and add clarity regarding the meaning of the hand-drawn image.

#### **4.3.7 Summary of hand-drawn images**

Hand-drawn images provide an additional form of data (Kearney & Hyle, 2004). The hand-drawn images created a path to the participant's emotions so that they were able to prepare verbally for the in-depth interview so that a rich

account of their BDAL experience was shared. The findings on hand-drawn images discovered that initially there was resistance to drawing the pictures as some participants perceived that they lacked drawing skills. After the initial resistance the participants felt that the drawings gave them the 'language' to articulate their learning experience as they were able to reflect on the learning experience through the use of colour, arrangement of images on a page, words and metaphors all of which surfaced attitudes, assumptions and emotions. This 'language' of drawing helped the participant to prepare for the in-depth interview.

Zuboff (1988) and Vince (1995) concluded that drawings are a catalyst to help participants articulate their feelings, as participants sometimes find it difficult to articulate their learning which can often be seen as invisible (Bong & Cho, 2017). In this present study the hand-drawn images made the learning visible to both the researcher and the participant. In addition, it is the researchers understanding that these findings add to literature on hand-drawn images together with an in-depth interview, as a form of data gathering in qualitative research. Both the participant's and the researcher's insight on the hand-drawn image method is included in the interpretive story so that richness is created in understanding the method.

#### **4.4 LEVEL OF TRANSFORMATIVE LEARNING DURING BDAL**

This section addresses the research sub-question: To what extent did participants experience individual transformative learning during BDAL? There are three headings in this section: Hoggan's criteria for transformative learning, Sterling's model for depth of learning and recognition of continuous learning in transformative learning. The researcher used the interpretive stories to check for transformative learning by applying Hoggan's (2016) criteria of depth, breadth and relative stability. In addition, during member-checking, participants self assessed the depth of their learning using Sterling's (2010-2011) model.

The fact that participants commented on their change during the in-depth interviews is not a surprise, as education can alter what participants know and can impact on habits of the mind, assimilate meaning perspectives and worldviews (Cranton, 2006; King, 1997; Mezirow, 1991; 2000). It can be argued

that the basic principles of BDAL assume that participants change as a result of the BDAL experience:

*I cannot be the same person (Mark-P3).*

*If you had to look at the person that started two years ago and the person I am today, a lot has changed (Sally-P3).*

However, this change does not necessarily mean that there is evidence of transformative learning. A reconstructed mind-frame can lead to a notable change in behaviour. Behavioural change is often seen as one of the key outcomes of transformative learning and is linked to actions consistent with new perspectives (Hoggan, 2016). People in the participant's lives commented that they have seen a change in the participant's behaviour. Two examples:

*My wife has told me that I ask too many questions and my boss has said that he has seen that I am asking different types of questions and also taking the initiative in more strategic areas (Luke-P3).*

*My mother has said to me that I have changed a lot as I have grown as a person. Mothers pick up first on this (Louie-P3).*

When people in the participant's lives notice that behaviour has changed it makes the change visible. However it can be difficult to determine what is truly transformative because learning is seen from an individual perspective, which is personal and makes it difficult to confirm or deny (Mezirow, 1998a). Ruane (2016) from her research established that transformation is not easy to ascertain and in some instances, she had to dig very deep to bring it to the forefront.

To put parameters in place, Hoggan's (2016, p.71) definition of transformative learning is applied where "transformative learning refers to processes that result in significant and irreversible changes in the way a person experiences, conceptualizes and interacts with the world." It is important to note that old habits remain in the participant's collection of meaning-making process (Hoggan, 2016) as noted by Julian-P3:

*The collaboration thing has been working quite well. I think we have seen some movement. Obviously not all the time because some discussions don't really have an impact. I think on the whole it's been working better, going in the right direction. From an influencing part, admittedly it's been not as good a progress as I would have liked to have. I think that is something I need to work on. Influencing people around me. I haven't*

*been very successful at it until now so I think that is more a focus area for me going forward* (Julian-P3).

This means that old habits may resurface at times, especially when stimulated by context or stress (Hoggan, 2016). This highlights that temporary change is not transformative learning.

#### **4.4.1. Hoggan's criteria for transformative learning**

In this section the Hoggan's (2016) typology (outcomes) of learning were analysed according to his criteria for transformative learning: breadth, depth, and relative stability. According to Hoggan (2016) *breadth* is the variety of contexts to which the learning applied, *depth* is the impact of the change, and *relative stability* implies that the change is irreversible, hence the permanence of transformative learning.

Using the interpretive story in this present study, all sixteen participants provided examples of depth and breadth in relation to a learning outcome. Appendix 14 is a summary of all sixteen participants' learning outcomes, with quotes representing depth and breadth from their interpretive story. Table 4.2 illustrates one of these examples from Appendix 14. The table includes a column that identifies the primary learning outcome identified by the second peer reviewer. The second peer reviewer identified transformative learning in terms of primary and secondary learning outcomes using Hoggan's (2016) transformative learning typology. The primary learning is the predominant outcome seen in the interpretive story. Transformative learning outcomes are best embodied as a cluster of specific outcomes, hence the purpose of the typology of transformative learning (Hoggan, 2016). In the second column, the researcher provided an example of the learning experience identified in the interpretive story linked to Hoggan's (2016) typology. The third column includes depth, where day to day examples from the interpretive story are included. In the fourth column, the same outcome and learning experience is viewed through the multiple domains of breadth, in a the number of contexts, including home/family life, reading, their own work teams, examples in the business and the BDAL set.

Table 4.2 Odwa-P3 example from Appendix 14 on typology and criteria for transformative learning

Participant	Primary Learning Outcome linked to Hoggan's (2016) Typology. Identified by the second peer reviewer.	Example of learning experience identified in interpretive story. Linked to Hoggan's (2016) Typology.	Depth – day-to-day, regular, impact of change. Examples from interpretive story.	Breadth - number of contexts. Examples from interpretive story.
Odwa	Odwa reported high levels of <u>self-insight</u> during the process. Her story suggests that she was ready for change when she entered the programme, and this became the catalyst for shifts in SELF especially with respect to finding her <u>purpose</u> , acknowledging her <u>identity</u> and making conscious life changes.	SELF: Identity, Purpose	<b>A year on, it really has assisted me.</b> <b>The extent this has changed me.</b>	BDAL group, home and Work: <b>I am no longer accepting this. It was a challenge to set those boundaries a bit more firmly. I think I did manage to do this both at work and in the BDAL group. Everybody in my life and at work. It's personal, but it has changed me so much. It has given me the confidence to stand up and say I've been in a relationship for a long time and now, this year, I have said I can't anymore. In just under two weeks I'm going to ask for a divorce.</b>

*Outcomes:* As part of McCormack's (2000a; 2000b) lens of process, 'coda' is included in each interpretive story (Appendix 6). The 'coda' is the outcome in the interpretive story (Elbaz-Luwisch, 2006), and it is this coda that the researcher and the secondary peer reviewer used to identify examples of transformative learning outcomes using Hoggan's (2016) typology of learning. In the coda, the participants mostly provided examples of their learning back at work and at home when they were concluding the in-depth interview. In this present study, the coda included what happened back at work and home, the actions taken and the impact of the change. The coda is often the participant's new professional practice at work and changes they have made in their personal lives. These findings support that transformation can lead to action and empowerment after participants have experienced a learning process (Freire, 2000; Mezirow, 2000).

*Lack evidence of breadth and depth:* Out of the 16 participants, there is only doubt about the evidence of transformative learning for Carmen. The second peer reviewer wrote: “Carmen’s story suggested she has a high need to be liked but it is not clear that her self-awareness around this is fully developed. However there is some evidence of learning about SELF that has taken place.” In Carmen’s-P3 interpretive story, there is limited evidence of depth and breadth. The researcher summarised lack of evidence in the epilogue in Carmen’s interpretive story:

*I found this to be one of the more difficult interviews to transcribe as Carmen’s thought processes were disjointed. I came to the conclusion that her not wanting to produce a drawing, did impact on her ability to fully reflect on her learning. I also felt, the fact that she laughed a lot in the interview, indicated to me, she was not that sure of her statements. However, the interview and the transcription gave me great insight into Carmen’s raw experience and her struggle during the BDAL. She repeatedly mentioned that BDAL was hard and this repetition emphasised the difficulty in applying the BDAL philosophy. The diversity in the group and the different working styles revealed a lack of common purpose in the team. The importance of a common purpose is the learning that she has taken back to the workplace.*

*Working in a team gave her insight into how she is striving to be liked by the group and how she did not want to challenge the group dynamics. This need to be liked is seen in a transition into her work behaviour and how she is attempting to manage this need in her current work environment. She uses the skill of journaling when she feels that she needs to process her thoughts and feelings around herself. At the end of the narrative Carmen was left with the feeling that she is good enough which suggest that she has come to terms with who she is as a person. Carmen’s story indicated that she has changed however this change is more along the lines of second order change which is reformative rather than transformative (Sterling, 2010-2011) (Carmen’s interpretive story).*

The evidence of transformative learning in Carmen’s-P3 interpretive story is not strong. However, she may have experienced transformative learning but not prepared sufficiently for the in-depth interview, hence the lack of depth and breadth in her interpretive story. What is noteworthy is that she did not include hand-drawn images in preparation of the in-depth interview, and the researcher is not sure if this may have impacted the lack of breadth and depth in her outcomes. Despite this, Hoggan’s (2016, p. 72) point that there are “no clear lines in life and certainly not in phenomena of such complexity as transformative learning” must be taken into consideration.

Carmen's explanations and thought process during the interview were disjointed and the level of her learning is not clear. What is important in this present study is that it aims to identify the extent to which learning is transformative (Hoggan, 2016), and this is not clear from Carmen's-P3 story. Hoggan (2016, p. 72) says "it would be simplistic to conceive of learning in a binary fashion as either transformative or not transformative." It does not mean that Carmen-P3 has not experienced transformative learning or will not experience transformative learning. Even though the evidence of Carmen's level of transformative learning is not strong the insight from her story is still of value to this present study and can be applied to the findings chapter as the interpretive story provided an understanding into the BDAL experience. Her story aided in the understanding of a BDAL experience, especially regarding the tensions in the BDAL set and her personal struggles with learning.

*Breadth:* In addition to the text examples in the interpretive stories, some of the hand-drawn images also included examples of breadth. For example, Odwa-P3 drew a circle of life and work. There is a variety of different contexts that address breadth. For example Sandy-P3 provides different examples of context to meet the breadth criterion as she provides examples from the BDAL team, work environment, Non Government Organisation (NGO):

She began to engage earlier in developments (in the BDAL team) and even initiated actions back at work. *What I've really learnt is to go and explore and make contact with other people, many of which are not necessarily in my environment.* She began volunteer work at an NGO. She now spends more time reading to learn, whereas, in the past, she didn't mind what she read (Sandy's interpretive story).

When the interpretive stories include examples of how the transformative learning outcome is applied at work and at home, they meet Hoggan's (2016) criterion of breadth as it establishes that the learning has an all-encompassing impact on the context of their lives. Taking action at home and at work from insight gained is important for transformative learning. There is a large gap between insight and the ability to act upon it (Kegan & Lahey, 2009). It is this acting on self-awareness which is stressed by authors such as Kegan and Lahey (2009) and Hoggan (2016) and is seen in examples where breadth is applied to the outcomes.

*Depth:* Reviewing McCormack's (2000b) lens of language helped to identify Hoggan's (2016) criterion of depth as words such as "day-to-day" or "regularly" were used. Depth was also emphasised when other people in the participant's lives commented on the change they had seen. For example, Sandy's-P3 learning outcome of self meets the criterion of depth as she mentions that other people have also commented on the impact of the change:

She experienced positive feedback from people in her work environment who noticed that her behaviour had changed, particularly when they commented: **What did you do with Sandy?** This acknowledgement of these noticeable changes happened regularly, which was previously not the case (Sandy's interpretive story).

Sandy-P3 also implies that the change of self is regular, thus meeting the depth criterion:

After her BDAL experience, she felt that she was stepping up to the plate earlier in the process. *I will step up a bit earlier and just start engaging early in the process where normally I would have waited.* During the BDAL programme she wrote a reflective journal. Prior to this, she did not keep track of her thoughts and behaviour and this was extremely difficult for her to do. She learnt to write her thoughts down. Since attending the programme, she has continued reflecting, consciously, once a week. Every evening she reflected on her day (Sandy's interpretive story.)

When the participants display that the typology is habitual and regular, it meets Hoggan's (2016) criterion of depth.

*Relative stability:* Relative stability "implies that a permanent change has occurred; it is irreversible" (Hoggan, 2016, p. 71) and in this present study, considering that in-depth interviews were held at least 10 months after the SMDP suggests that if change occurred it is permanent and irreversible. For example, Odwa's-P3 primary learning outcome is self. This outcome meets the transformative learning criteria of depth and relative stability as she mentions the words "a year on" and "I just want you to get an insight on the extent this has changed me", implying the impact of the change and that this has altered who she is, that is, her identity. She also meets the criterion for relative stability as she mentions that BDAL has "changed me so much", implying that her identity and purpose has permanently changed.

#### 4.4.2 Sterling's Model: Depth of learning

Depth of learning concerns the impact of a change or the extent to which it affects any particular type of outcome, such as worldview, self, epistemology (Hoggan, 2016). To expand on Hoggan's (2016) definition of depth in terms of transformative learning, Sterling's (2010-2011) model provided participants with an indication of levels of learning so that they could self-assess their learning. Not only did the second peer reviewer and the researcher analyse the learning, but the participants themselves were asked to self-analyse their learning. Sterling's (2010-2011) model on the types of change and learning was shared with the participants five months after the in-depth interview as part of member-checking.

The researcher felt that Hoggan does not provide appropriate understanding on analysing depth and Sterling's model (2010-2011) was therefore used to explore the concept of depth further. In Sterling's model (2010-2011), the first order of learning is about effectiveness and efficiency, which is not deep learning. The second order is about changing assumptions and the third order is about paradigm change. It can be argued that second order change can be transformative if the outcomes meet Hoggan's (2016) criteria of breadth, depth and relative stability. Second order change could also be the phase of 'unlearning' assumptions, which could also indicate transformative learning. Unlearning takes place when the participant goes through a process of rethinking and confronting what they already know (Hedberg, 1981). This causes a "rupture" experience that rejects previous thinking and behaviour and allows new habits to be introduced (Sofu, et al., 2010, p. 210). In this present study, participants were asked to choose the level of learning that their interpretive story depicted and explain why they choose that level. In Table 4.3, Sterling's (2010-2011) model is summarised, and it is this model that the participants applied to their self-analysis of their learning after reading their interpretive story during member-checking.

**Table 4.3 Sterling's (2010-2011) model of levels of learning**

Sterling's (2010-2011) levels of learning
First order change – effectiveness/efficiency, which can be labelled as doing things better.

Sterling's (2010-2011) levels of learning
Second order change – examining and changing assumptions, which can be labelled as doing better things.
Third order change – paradigm change, which can be labelled as seeing things differently and is hence transformative.

Based on the participants' feedback during member-checking, eight out of the 16 participants felt that their level of learning was third order learning, where they see things differently. One participant felt that his learning was between second and third order learning, and seven out of the 16 felt that their learning was second order learning where they have changed their assumptions and are doing better things. No participants chose first order learning. Second order change involves changing of assumptions, which meets Mezirow's (2000) definition of transformative learning; however, the third order change indicates a deeper level of transformation according to Sterling's (2010-2011) model.

Those participants who see their learning level as a second order change and have not yet reached third order change may be in a *threshold state or liminal space*. A liminal space is a "transformative state in the process of learning in which there is a reformulation of the learner's meaning frame and an accompanying shift in the learner's ontology or subjectivity" (Land, Rattray & Vivian, 2014, p.199). The phrase "threshold concept" is used to describe liminal space as it is a state "akin to a portal, opening up a new and previously inaccessible way of thinking about something" (Meyer & Land, 2005, p. 1). An example of a threshold state from the interview includes the following comment:

*With my colleagues it (BDAL) has changed the way I have dealt with them, with my team... I think ... I am not sure if I have changed enough yet in this point in time? I thought to myself that I need some time to process this (his learning) and how do I apply them and ... what to take further and start to concentrate on (Luke-P3).*

Once the participant has worked through the liminal state, it suggests that there is transformation of the way they understand, view or interpret something (Meyer & Land, 2005). This shift in perspective leads to changes in personal identity and a reconstruction of subjectivity (Meyer & Land, 2005). In this regard, there are correspondences with Mezirow's (1978) work on perspective transformation, which is the first step towards transformative learning.

Many participants used the word ‘unlearning’ instead of ‘learning’. An example of this is: “*I had to unlearn things.*” The findings in this present study relate to those of Brook, Pedler, Abbott and Burgoyne (2016), that the process of unlearning is characterised by conflict and emotions, as unlearning is difficult. What is noteworthy in this present study is that when participants unlearned certain beliefs, it enabled their worldview to open up:

*I had to unlearn that I didn't know everything and that there was so much more. My world literally opened up (Nsikelelo-P3).*

*The only way to break that (not be aware of your weaknesses) is to stop and question yourself and interrogate the learning barriers. It is about re-learning (Mwali-P3).*

The findings support Land, Rattray and Vivian’s (2014) comment that learning is as much about unlearning previously held beliefs as it is about acquiring new ones.

*Peer reviewer:* Not only did the participant’s themselves self assess their level of learning, but the second peer reviewer also agreed that there was evidence of transformative learning in her analysis using Hoggan’s (2016) typology. She wrote the following in her summary:

*The stories offer strong evidence that transformational learning took place, at least for individuals in this sample. It is also clear that insight into self, changes in worldviews or ontological positions and expanded capacity preceded shifts in behaviour. This suggests that the transformational learning process can be triggered by various antecedents that then, and only then shift behaviour (Second peer reviewer summary).*

What is notable from the peer reviewer’s comments is that she identified the transformative learning outcomes into primary and secondary learning. She identified that the insight into self-changes in worldviews or ontological positions and expanded capacity “*precede* shifts” in behaviour (Appendix 11, Second peer reviewer’s comments). This implies that the typology can be rank ordered as the outcomes of self, worldview, epistemology, capacity and ontology precedes the outcome of behaviour.

In summary, Sterling’s (2010-2011) model emphasises Hoggan’s (2016) point that it is simplistic to describe learning as either transformative or not transformative as level two and three can be seen as transformative learning. What is important in this present study is to justify why and the extent to which

learning is transformative (Hoggan, 2016), hence the importance of Hoggan's (2016) criteria of relative stability, depth and breadth

#### 4.4.3 Recognition of continuous learning in transformative learning

Even though the participants confirmed that they feel that they have changed, there is also recognition of how difficult it is to change and how they struggled with transformative learning:

*I'm a conservative, structured type of person, I'm not open minded. It is difficult to change if you're a perfectionist (Charmaine-P3).*

Transformation does not mean a person will never change again (Hoggan, 2016):

*Obviously, there is a lot more that I will be able to do. To push and encourage going forward. I just feel I want to explore more. I want to uncover all these hidden depths. I have definitely grown and now able to work on the next level, but I don't think it is something that stops. This will always develop and I need to adapt. I don't think this is something that stops (Odwa-P3).*

Even though there is evidence of transformative learning, this transformative learning is continued learning as participants continued learning after concluding the BDAL experience. The interpretive stories are work-in-progress (Giddens, 1991). Coratssi (1993, p. 44) confirms that "a fully formed story" ends with a resolution to the dilemma that participants have experienced. Nevertheless, this present study indicates that as adult learners these participants constantly develop and that their learning is not static, but an on-going process. Findings indicate that most participants are still thinking about their learning and development:

*From an influencing part, admittedly it's not as good a progress as I would have liked to have. I think that is something I need to work on. Influencing people around me. I haven't been very successful at it until now, so I think that this is a focus area for me going forward (Julian-P3).*

This was also evident from the illustrations. For example, Odwa-P3 drew an iceberg in her picture in Figure 4.7 to represent the hidden depths and her potential to still grow and develop: "Obviously, there is a lot more that I will be able to do. To push and encourage going forward. I just feel like I want to explore more. I want to uncover all these hidden depths."

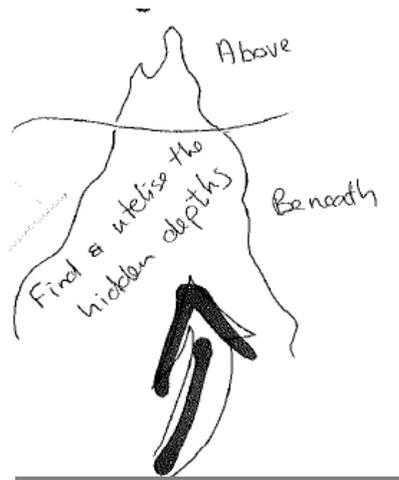


Figure 4.4 Iceberg (Odwa's hand-drawn image)

Consequently, learning is life-long and is a continuous process, and even if transformative learning takes place in one or two outcomes, such as self and worldview, a participant can still continue to learn and meet other aspects of the typology of learning.

#### 4.5 SUMMARY

This chapter was dedicated to the analysis of Phase Three research. It explored how the researcher moved from transcript to interpretative story using McCormack's (2000a; 2000b) lenses of language, context and moments. What is noteworthy is that the interpretive stories themselves are a form of analysis as each interpretive story provides insight into the participant's experience. However, the researcher was still left with pages and pages of stories that still needed further analysis if the main research question was to be answered.

In this chapter, the researcher also reflected on the method of hand-drawn images and concluded that this method gave the participants the opportunity to reflect on their individual learning which made the learning visible to the participant and the researcher. What is noteworthy is that participants used colour, images arrangement on the page, words in their drawings, metaphors to express their learning, thereby providing a 'language' to describe their individual learning. Participants used the 'language' of drawing to articulate their learning in the in-depth interview.

It was important to establish the extent of transformative learning in this chapter before the interpretive stories were analysed in Chapter Five to provide

understanding on the type of individual learning that resulted due to BDAL. The researcher, the second peer reviewer and the participants analysed the extent of transformative learning. The researcher analysed each interpretive story by identifying the main transformative learning outcome in the story and whether this outcome met Hoggan's (2016) criteria for transformative learning. The participants self-analysed the depth of their learning using Sterling's (2010-2011) model. The concepts of *unlearning*, *liminal state* and transformative learning being part of *continuous learning* were included in the discussion on transformative learning. The findings from the interpretive stories concluded that all of the participants except for one, showed evidence of transformative learning as a result of their BDAL experience.

## **CHAPTER FIVE: INTERPRETATION AND DISCUSSION OF THE DATA GATHERED**

### **5.1 INTRODUCTION**

This chapter is an interpretation and discussion on the data gathered and analysed in Phases Three, Four and Five. The chapter makes sense of the interpretive stories from Phase Three. Chapter Four explored the process of moving from transcript to interpretive stories; however, once the interpretive stories were written, it follows that the interpretive stories themselves require analysis and discussion which is the focus of this chapter. This chapter also includes a discussion on the findings from Phase Four, where the participants compared their story to the interpretive stories from Phase Three (crystallisation). Feedback from action learning facilitators on the new conceptual framework (which comes from the global and organising themes identified in this chapter) as part of Phase Five is incorporated into this chapter. This chapter is, therefore, an analysis and discussion of the findings from the interpretive stories in relation to the research questions (Q2 and Q3) and supports crystallisation due to the different viewpoints that are considered.

Research sub-question (Q1) to what extent did participants experienced individual transformative learning during a BDAL process was addressed in Chapter Four, where the level of transformative learning was discussed. Once the extent of the transformative learning was analysed it made possible the next step, which was to address the other research sub-questions.

This chapter addresses the other research sub-questions:

Q2: What are the preconditions that create an environment for individual transformative learning during BDAL?

Q3: What outcomes resulted from the BDAL experience?

Sub-research question Q4: What conceptual guidelines can be recommended for the four key stakeholders: the sponsoring organisation, the learning institution, the participant and the action learning facilitator to aid individual transformative learning in BDAL? The conceptual guidelines are introduced in this chapter but are listed as part of the recommendations in Chapter Six as part of conceptual guidelines.

The researcher was able to identify basic, organising and global themes from following Braun and Clarke's (2006) thematic analysis of the interpretive stories. Thematic analysis was chosen as it is a method for identifying, analysing, organising, describing and reporting themes discovered within the data (Braun & Clarke, 2006). Braun and Clarke reflexive thematic analysis was chosen due to its theoretical flexibility as well as it being a widely used and rigorous process. In addition Braun and Clarke's (2006) thematic analysis does not involve detailed theoretical knowledge but makes it an accessible form of analysis.

Themes were identified in the form of basic, organising and global themes. Basic themes are the lowest-order premises, organising themes are categories of basic themes grouped together to summarise more abstract principles and global themes are super-ordinate themes encapsulating the organising themes in the text as a whole (Attride-Sterling, 2001). A thematic network diagram with web-like representation, introduces each global theme in this chapter. Thematic network diagrams allow for codification of textual data and aids in structuring and organising of analysis with the aim of identifying patterns (Attride-Sterling, 2001). Thereafter, each global theme and organising theme was identified and briefly explained. A significant response using direct quotations from the interpretive story is then included as well as a discussion on the findings. In narrative analysis, it is important to keep the text as intact and un-fragmented as possible, hence large sections of the text are in direct quotations.

There were five global themes. The first global theme addressed a research sub-question by identifying the preconditions that created an environment for transformative learning. The global theme "preconditions for transformative learning within BDAL" need to take place before BDAL starts, and are known as the antecedents to BDAL. The global theme of preconditions for transformative learning included the following organising themes: *readiness of the participant to learn, supportive relationships and team conditions*.

The second and third global themes describe the process that needs to take place before individual transformative learning takes place. The process is what takes place during a BDAL experience. The second global theme was called "active reflection on self and others"; it included the following organising

themes: *reflection is a new skill, role of the coach in reflection, stop, listen to understand others, comfort levels during reflection and moments of insight*. The third global theme was “sense of control”; it included the following organising themes: *control and unease, let go of control, show vulnerability and intense emotions*.

The fourth and fifth global themes addressed a research sub-question by recognising the transformative learning outcomes that resulted from the BDAL experience. The fourth and fifth global themes related to outcomes and are placed under the heading of distal outcomes as they link to transformative learning outcomes that take place after the BDAL experience. The words distal and proximal are used in this chapter as proximal means near, and these outcomes are linked to the BDAL business challenge, whereas the distal outcomes are used to describe transformative learning outcomes as this is further away from the business challenge and speaks to individual learning outcomes. The proximal outcomes were not researched in this present study, but adapted from the literature on the outcomes of BDAL resulting in individual learning, team learning and organisational learning (Boshyk, 2011). The fourth and fifth-global themes, which are distal outcomes, connect to the proximal outcome of individual learning.

The fourth global theme was called, “multiple perspectives”; it included the following organising themes: *deep-rooted assumptions, being open to possibilities and showing respect for others*. The fifth and last global theme was “self-awareness and confidence”, which included the following organising themes: *positive shift in self, different person due to self-confidence and search for purpose*.

To ensure that substantial and ‘irreversible’ change is promoted as a result of the BDAL experience, it is desirable that preconditions (antecedents) before BDAL and processes during BDAL need to take place to promote proximal and distal outcomes. If an antecedent does not take place the individual might experience power dynamics and relationship challenges both of which enable and constrain action and learning (Trehan & Pedler, 2010). Figure 5.1 summarises the global themes and organising themes resulting from this present study and provides structure to this chapter.

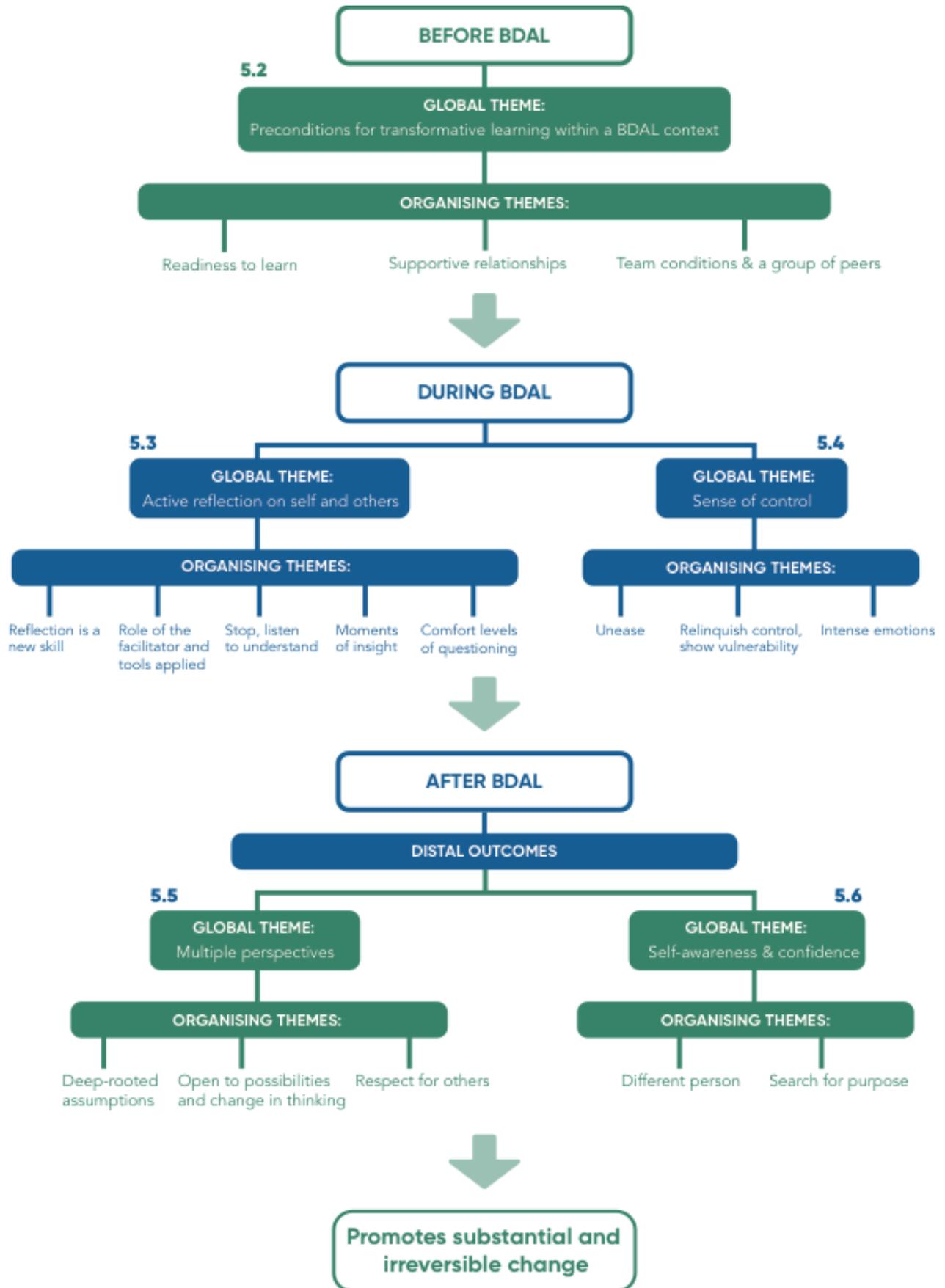


Figure 5.1 Summary of the global themes, organising themes and basic themes resulting from the research

Thereafter, the findings from this present study are illustrated in a systematic map. The systematic map is essentially a way to organise all global and organising themes in a process. To conclude feedback from action learning facilitators on the new conceptual model and feedback from participants on the use of interpretive stories is presented in Chapter Five.

## **5.2 GLOBAL THEME: PRECONDITIONS FOR TRANSFORMATIVE LEARNING WITHIN A BDAL CONTEXT**

The global theme “preconditions for transformative learning” includes antecedents, which is suggested are in place before the BDAL starts and included the following organising themes: *readiness of the participant to learn (willingness, ability and time)*, *supportive relationships (line managers, colleagues, family, the set and action learning coach/facilitator)*, *a group of peers and team conditions*. The organising themes *group of peers and team conditions* have many similarities: they both included the basic theme of *diversity* in the team, the basic theme of *communication in a team* is linked to *questions from a different perspective* and *rules of engagement* which aim at encouraging effective team dynamics. Due to these similarities these two global themes were joined together under one heading, *team conditions*. The network diagram for this section on preconditions for transformative learning is seen in Figure 5.2. In this chapter, each network diagram included the global theme (the large bubble in the centre of the diagram), organising themes (the four smaller bubbles in the diagram) and basic themes (the text that is linked to the smaller bubbles).

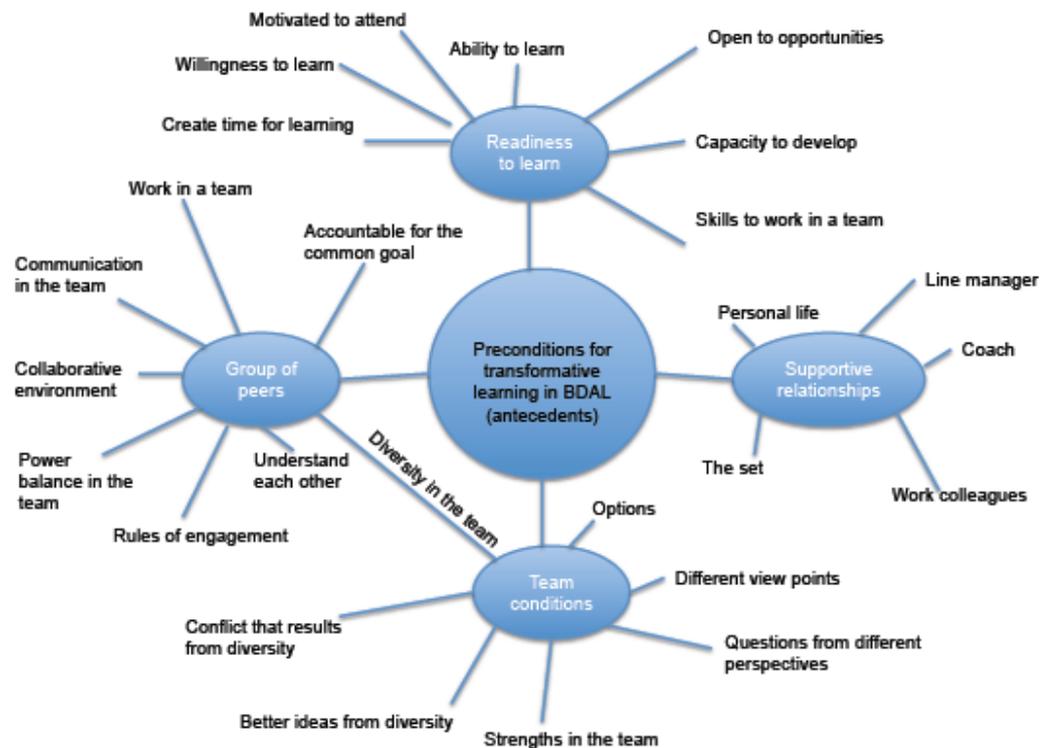


Figure 5.2 Network diagram for desirable preconditions for transformative learning in BDAL

### 5.2.1 Organising theme: Readiness of the participant to learn

The organising theme *readiness of the participant to learn* consisted of the following basic themes: *ability to learn*, *open to opportunities*, *capacity to develop*, *skills to work in a team*, *create time for learning*, *willingness to learn* and *motivation to attend*. Kegan (1994, p. 34) argued that “transforming our epistemologies, liberating ourselves from that in which we are embedded, and making what was a subject into an object so that *we can have it rather than be had by it* is the most powerful way I know to conceptualize the growth of the mind.” The suggestion is that growth cannot take place if the participant is not ready to learn.

In this present study, the organising theme *readiness of the participant to learn* is understood by understanding the three basic themes of: *willingness to learn* (included *motivation to attend* and *open to opportunities*), *the ability to learn* (*capacity to develop* and *skills to work in a team*) and *the time to learn*. The first

basic theme was *willingness to learn*. The first question that the participants were asked in the in-depth interview was why they attended the management development programme as the intention was to understand their willingness to learn. *Willingness* entails “the story before the story” and in this present study, the story of why the participant attended the management development programme is the story before the story (Elbaz-Luwisch, 2006, p. 358). Most participants concluded that they wanted to attend the management development programme. Revans (1991) mentioned that one of the key principles of action learning is that participants recognise their need to learn. Findings indicated that when a participant wanted to be on the programme, it was an indication that they were willing to develop as they were open to change: “*What made a difference was readiness.*” The hand-drawn images supported the view that if participants wanted to be on the programme they were ready to explore their potential, Odwa-P3 drew an iceberg in Figure 5.3. This represented her hidden depths, which she wanted to explore, hence her willingness and choice to attend the programme.

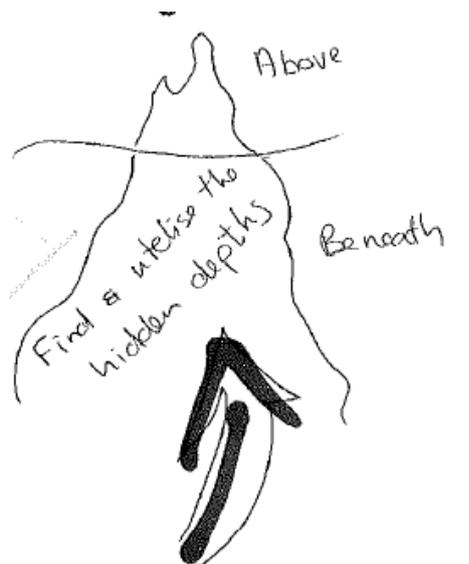


Figure 5.3 Explore more about the self (Odwa’s hand-drawn image) (same as Figure 4.4)

These comments indicate that if the participants wanted to attend the programme, then they were more motivated to participate in the BDAL project and work with the set on the business challenge. The motivation level in the set is one of the significant challenges in action learning and if the participants are

not willing to participate, this impacts on the set dynamics (Hughes, 2010) and decreases the chance of success during BDAL. Motivation to learn is one of Knowles' (1990) adult learning principles and is considered an important aspect of adult education.

Participants who are open and willing to learn will try different things as they are interested in learning (De Meuse, 2017). There are no promises of transformative learning, only opportunities (King, 2005) and if the participants are not willing to learn, they may miss the opportunities for individual transformative learning. However, it should be the participants' choice, whether they wish to take up the opportunity for transformative learning (King, 2005). Long (1990) advocated that learning is an active process where participants seek out educational experiences. Those participants who are ready for development seek out opportunities for themselves and are able to recognise prospects that BDAL provides. The findings from most participants in this present study indicated that they recognised that BDAL was a chance for them to learn, and it was their choice on how open they were to opportunities:

*You can choose to sink or swim during this (BDAL) process and I chose to swim (Mark-P3).*

*There's this whole world here and you can go into it and you can take from it what you want. The people who are going to change the most are those who are open to it. I was hungry. I was ready (Mbali-P3).*

Even though most participants in this present study were willing to be on the programme, they mentioned that some of their team members did not feel the same and that some were 'forced' to be on the programme by their line manager and sponsoring organisation. Due to this, certain participants were resentful and unwilling to put in the extra effort that BDAL required. When a participant is unwilling to put effort into learning this can impact on the engagement level and team dynamics, as these participants place limited attention and effort into working on the business challenge:

*Some people saw it as an opportunity to learn (that was me), others thought what can I do to get that piece of paper (referring to the certificate of competence), others said I am being forced to be here (Sandy-P3).*

*There was definitely a possibility of disengagement from the beginning by some people who felt forced to be there (Luke-P3).*

The findings support Bauer (1985) and Revans (1982, 1991) where they emphasised that in order to learn a participant must wish to learn and that this learning must be their choice. Action learning theorists include readiness to grow and change as one of the most important factors for individual learning and development (Marquardt, et al., 2009). In nurturing a transformative learning environment, one of the key factors is that the participant wants to learn (Mezirow, 2012). Transformative learning cannot be mandated (Kets De Vries & Korotov, 2007). Bourner (2011a) questions if it is possible to develop people's readiness for action learning. This point may be contested as participants may not start the BDAL as being ready but may become ready through supportive set relationships and active reflection on self and others (organising themes in this present study). However readiness is not something that can be enforced by stakeholders as the participants must decide if they want to work in a BDAL set on a business challenge and a personal challenge. In an ideal BDAL scenario, the participant would start the BDAL ready for learning.

This has implications for the sponsoring organisation in their selection of participants involved in BDAL, as participants cannot be forced to be on the programme. This supports the link to Revans' (2011) characteristic assumption of action learning, that it should be voluntary, and Pedler and Abbott's (2013) confirmation that action learning only works if participants are willing and open to learning. No matter the BDAL design, if the desire to learn is not present, learning cannot progress (O'Neil & Marsick, 2007). In summary, the selection criteria for BDAL should consider how motivated the participant is, their career stage and their developmental needs (Conger & Toegel, 2002) before participants attend a management development programme that includes BDAL.

Willingness is not the only conditions when reviewing a participant's readiness; ability should also be considered. The second basic theme from this present study was *ability*. Avolio (2010) emphasized the importance of understanding developmental readiness of the participant to transform. Many participants felt that not everyone in their set was able to learn, as they did not have the ability to contribute to the BDAL project. Ability to learn is a meta-concept that is a

collection of individual characteristics and attributes that aid participants in their development (DeRue, Ashford & Myers, 2012). In this present study, participants described ability to learn as: “*know how to learn*”, “*self-efficacy*”, “*ability to work in a team*”, “*ability to work with an unfamiliar BDAL topic and skills*.” When a team member was not able to contribute to the BDAL due to their lack of ability, the other set members completed the work, which led to frustration:

*Some of the people felt that they could not do the work as they didn't have the skill necessary or the ability to do what we needed to do, and it was easier to delegate it to someone else, not delegate, but let someone else deal with it (Luke-P3).*

*Can you believe it, she's (a team member) in a management role, she was not able to do it? She can't do it (the BDAL project). It's like she can't do it, she does not have the ability to do it. The whole team was very disappointed. It was very frustrating (Charmaine-P3).*

When companies report an unsatisfactory result from an action learning project, it can be due to the poor selection of participants who are too junior or inexperienced (Boshyk, 2011). Cranton (1994) cautioned that many participants do not have the ability to think critically about problem framing, which means that working in a set can be frustrating if participants do not have the required skills. Ability is required from participants so that they are able to engage with learning (Azjen & Fishbein, 1980). When efficacy is low, a participant is likely to avoid certain tasks (Yoon & Kayes, 2016). Individual self-efficacy and team-learning skills can contribute to building individual learning (Yoon & Kayes, 2016). For this reason, ability to learn seems to be one of the success factors to consider in the selection of participants who work on BDAL projects. There is an argument that transformative learning is more suited to participants who are at mature levels of cognitive functioning (Merriam, 2004). Therefore, it would be helpful if participants have critical thinking skills about problem framing, team-learning skills and are at a mature level of cognitive functioning before the BDAL project takes place. When individual ability and self-efficacy is high, a participant is likely to engage in tasks required to complete the BDAL project. Participants who lack self-efficacy engage in defensive behaviour that blocks learning (Edmondson, 1999). Examples of defensive behaviour are shown in stories as not finding time for the work, handing in work late, not buying into the

business challenge topic, trying to control others and showing individualistic arrogance.

Learning willingness and learning ability have been described as learning agility (De Meuse, Guangrong & Hallenbeck, 2010; Eichinger & Lombardo, 2004). To quote John Ryan (2009, p. 7), the president and CEO of The Centre for Creative Leadership: “To succeed in a world where our work is always changing, where challenges are unpredictable and competition abounds, we need to be agile learners.” Learning agility is a valuable indicator of whom to place into management development programmes, as these participants will most likely benefit most from the developmental experience (De Meuse, 2017).

The third basic theme from this present study was *create time for learning*. Finding time for learning was mentioned many times during the in-depth interviews. Many participants commented on the struggle they experienced in trying to create a balance between work, personal life and BDAL. Reynolds and Trehan (2000) found that one of the main challenges with regards to action learning is that it takes time, which managers in today’s world of work are struggling to find enough of:

*This takes up a lot of my work time as well. I mean we’re not full-time students. This is not all that we have to do for this year. We’ve got other things as well. My workload was so busy, and I had the BDAL on my desk. Time is running out to complete the BDAL (Prisha-P3).*

Many participants drew clocks in their pictures to emphasise the time pressure they felt while completing the BDAL project. For example Figure 5.4.



Figure 5.4 Time management (Prisha’s hand-drawn image)

It is not a good idea to be part of an action learning set if the participant has too many other commitments (Pedler & Abbott, 2013). Some participants mentioned their time commitments and indicated that they had too many commitments and not enough time for a BDAL project:

*I've got work to do. These people (set members) are wasting my time. I need to move on (Prisha-P3).*

*I hate this! I don't want to do this anymore; it's taking so much time. When I started the BDAL I was very close to quitting. I didn't have the time, I felt overwhelmed (Sally-P3).*

Some participants mentioned that they were hoping for a quick solution to the BDAL project and that the team would work quickly on the project so they could get back to work. The findings support Hedberg's (2009) findings that participants struggle with time as they hope for quick results with limited input. The inability to invest time may interfere with BDAL (Hicks, 2002). Maintaining routine work responsibilities may take priority over action learning (Dinkin, 2013; O'Neil & Marsick, 2007; Park, 2004), resulting in lack of buy-in to BDAL.

The findings on time management support Ingram, Biermann, Cannon, Neil and Waddle's (2000) research where the participants found time a challenge but once they had managed to deal with time constraints, action learning can be very rewarding. What is noteworthy in this present study is that most participants confirmed that they expected other set members to fit in with their schedule and workload without showing them the same consideration. The initial lack of consideration towards set members' time was mentioned by many participants. Some of the participants realised that their lack of consideration of others' time affected the set:

*I expected everyone to work like I do (Mbali-P3).*

*I am a lot more conscious of time. I'm a lot more conscious of other people's time. (Prisha-P3).*

Once participants realised that they had to consider other set members needs and time commitments, they were more understanding of others, less individualist and aware of others needs. Each participant in the set is responsible for their own behaviour and feelings (Goleman, 1995) and all set members have different energy levels (Edmonstone, 2003). This is an important consideration when participants are struggling with time constraints as time puts

extra pressure on the set.

In this present study, the sets who consciously set time aside to get to know each other, sat down and had meals together. These were the teams who really understood each other and stopped trying to solve problems quickly. If set members wish to solve a business challenge, they need to do so with others, as there is limited space to act as an individual. Findings from Ruane's (2016) research on an accredited postgraduate executive programme underpinned by an action learning philosophy were that those who formed close bonds in their action learning teams found transformation easier. The sets that did not rush through the BDAL project as a task, but rather focused on spending time to understand each other and gain insight into each other's views formed stronger connections:

*Team building was really about eating together and spending time together and while we were doing this, we got to understand his background and why he was so outspoken (Fatima-P3).*

*At weekends when we had to work and come in, we ate together as a group – when you share a meal with someone, you see another side of them (Louie-P3).*

When participants do not have enough time to spend on action learning, it compromises the tradition of reflection in action learning (Simmonds & Tsui, 2010). The connotation is that without reflection, transformative learning and action learning struggles to take place. Pedler and Abbott (2013) wrote that it is sometimes argued that Revans' ambition for learning puts too much pressure on participants and that action learning is too difficult and time-consuming. However, those sets that spent time together and understood each other felt less frustrated with the BDAL process, thus giving them the opportunity to gain the benefit of working in a set environment. Therefore, it can be understood that readiness includes continual active reflection which takes time as time is needed to shapes new thoughts.

### **5.2.2 Organising theme: Supportive relationships**

The organising theme *supportive relationships* was repeatedly mentioned by many participants and consisted of the following five basic themes: *line manager, personal life, work colleagues, coach (action learning facilitator) and the set (action learning team)*. The first basic theme was *line managers*. In this

present study, the importance of a supportive line manager was emphasised as participants felt that this helped them feel encouraged and the workload was managed, thus giving them the opportunity to make the most of the BDAL:

*My manager constantly checked up on me to see if I was managing the workload. In fact, she reduced my workload (Rhys-P3).*

Participants who are involved in teamwork require time, in other words, 'slack in their schedule' so that they have time to practice, experiment and reflect to promote learning (Edmondson, 2003; Sarin & McDermott, 2003). Senior management needs to support the team by giving them time to learn (Edmondson, 2003). Revans (1991) also mentioned that those who support participants in their action learning must be clear on the nature of the participant's need to learn and their own capacity to supply it. The findings confirmed that a learning environment needs to be supported by line management as participants need to be given ample time and encouragement to learn. Holton and Naquin (2002) suggest that the participant's manager is significant to learning transfer.

The second and third basic themes were *personal life and work colleagues*. It is not only the line manager's support that participants needed but support from people in their personal life and work colleagues. Those participants who prepared their family and work colleagues before the BDAL for the impact that BDAL would have on their lives were better equipped to deal with the programme. This was confirmed by the following comments:

*I prepared my family for the time it would take (Rhys-P3).*

*If you don't sit down and realise what the impact is going to be from a time and availability perspective and consider how it will impact on your colleagues, your reports and your family, you can find yourself overwhelmed (Odwa-P3).*

The word "*prepared*" is significant in the stories as those participants who equipped themselves and other people in their life, e.g. family, colleagues and the actual BDAL team seemed to be more ready for the BDAL experience and emphasised the importance of preconditions to BDAL. The hand-drawn images also included illustrations of support from the team and family members. For example Figure 5.5.

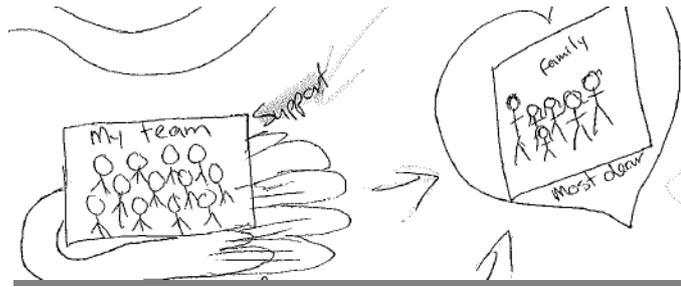


Figure 5.5 Support from work team and family (Odwa's hand-drawn image)

Feeling supported by the colleagues and people in their home life gave the participants the space to fully participate in the BDAL learning experience. The fourth basic theme was *the set*. If the participants felt supported by the set there was a higher level of engagement amongst members. This was evident from the following comments:

*There was a lot of support from everyone (in the set) (Fatima-P3).*

*There was a high level of engagement and we were very comfortable with each other. There was a high level of trust (Odwa-P3).*

However, it seems as if not all sets were supportive of each other. It is worth highlighting that some participants, when they compared their sets to other sets on the SMDP, found their set supportive. Examples of this included:

*Being aware of these differences and what makes people tick allowed people to be themselves. Because of this, we did not have horror stories in our group and we did not experience what some other groups did (Logan-P3).*

*We actually had a very easy group compared to the other groups (Sally-P3).*

Transformative learning can be viewed as an individual experience (Newman, 2014). Despite this the individual transformative learning in this present study was an individual experience that took place within the group experience, hence the need for a supportive team.

The fourth basic theme was *the action learning coach* (action learning facilitator). The general feeling was that the action learning facilitator played a significant role in supporting set members. Many participants mentioned that *"He kept our energy levels up and made us aware of where we were going and that the challenges we faced were normal."* Corey and Corey (1992) ascertain that the aim of most facilitation is to help individuals reach their own goals and

in this present study, participants set their own personal learning goals and helped participants to stay motivated.

Participants learn effectively in a facilitated environment and learn skills such as interpersonal skills and the ability to address complex problems better in a facilitated environment (Brookfield & Preskill, 1999). In addition, a facilitated environment enhances democracy (Heron, 1999). Therefore, action learning facilitators can be supportive to enable transformative learning (O'Neil & Marsick, 2014). Participants need a supportive environment for transformative learning to take place (Lamm, 2000), which is where the action learning facilitator can contribute to creating a safe learning environment.

Carmen in her story mentioned that SMDP was a “consolation prize” as she rather wanted to complete her MBA. She also used the words “did not have a choice” all of which could indicate that her willingness to attend the management development programme was low. She further mentioned that she found relationships challenging, she talked about the action learning coach making her cry and that working in a set was “challenging.” In addition, she constantly mentioned wanting to “being liked” by her set and her colleagues back at work, which suggest that she did not feel supported. Revans' (2011) believed that action learning is a voluntary decision. In summary the findings on the organising theme supportive relationships support Ball's (1999) research, where participants who had undergone transformative learning had support from family, friends, mentors and real-life experience. Carmen did not mention her line manager in her story, and in McCormack's (2000) lens of language it is important to consider what was not said. Lysø, Mjøen and Levin (2011) propose that conditions such as the presence of support from senior members in the organisation is essential for action learning to be effective.

What can be seen from this discussion on supportive relationships is that these relationships take place before the BDAL experience takes place (i.e. before the set starts working on the business challenge) and continues throughout the experience. It would be naïve to assume that support is necessary only at the beginning of the programme, as support from all line managers, colleagues, family, the action learning facilitator and the set (team) is necessary throughout BDAL and sometimes even after BDAL is completed. The importance of support

as a factor before, during, and after a management development programme is supported by Broad and Newstrom (1992) and Cheng and Ho (2001). When reviewing BDAL, the design is an important consideration as there is a need to consider how to include support from the line manager, the set and the action learning coach (Broad & Newstrom, 1992; Yorks, 2003). Boshyk (2014) has already suggested that top executive ownership of the business challenge is a component in BDAL and this includes support and engagement from stakeholders but these findings suggest that supportive relationships from the line manager, colleagues, people in their personal life, the BDAL team and the action learning facilitator are also beneficial.

### **5.2.3 Organising theme: Team conditions and group of peers**

The following two organising themes are joined together *team conditions* and a *group of peers* and are summarised as *team conditions*. The BDAL set is made up of a group peers which is challenging for participants to work with (Dilworth & Willis, 2003), hence the term *team conditions* was deemed more appropriate as this group of peers still has challenges that all teams experience (Trehan & Rigg, 2015). *Team conditions* included two key basic themes: *diversity in the team* and *rules of engagement*. The first key basic theme of *diversity in the team* included the following: *questions from different perspectives, options, better ideas, strengths in the team* and *different viewpoints*. They are grouped together as they are a result of a diverse team. The second key basic theme was *rules of engagement*, which are necessary when working in a diverse team. This key basic themes of rules of engagement included the following: *working in a team, a collaborative environment, communication in the team, conflict that results from diversity, power balance in the team* and *accountable for the common goal*.

One of the BDAL component parts, according to Boshyk (2011), is teamwork where the group works on the business challenge which is set by the sponsoring organisation and a personal challenge which is determined by the participant themselves. The narrative in BDAL is often found in the practices that take place in the set and the action taken in terms of the project, emphasising Revans' (2008, p. 6) quote: "There can be no learning without action and no (sober and deliberate) action without learning." Team conditions

are related to the set themselves which supports Revans (2011, p. 10) comment that the set is “the cutting edge of every action learning programme,” as it is the set that takes ownership for the learning. In addition, this is supported by Sterling (2010-2011) who recommends that small groups are necessary for transformative learning to occur.

The first basic theme was *diversity in the team*. The basic theme *diversity in the team* can be linked to the other basic theme of *questions from different perspectives, options, better ideas, strengths in the team and different view points*. Diversity in the set allows the team members to access alternative thinking and experience (Hicks, 2002), which is important if the intention is to promote different world views as a result of transformative learning. A diverse set is made up of a diverse group of people from different ages, races, genders, geographic locations, business units, experiences, educational backgrounds and positions in the organisation. There should be sufficient diversity amongst participants to devise different types of questions and that diversity comes from varying situations, contrasting personalities and differing life experiences (Pedler & Abbott, 2013). From the findings, diversity was considered a benefit by most participants, for example:

*Different people come together from different demographics, I saw an advantage in that which I have not seen before. It was a good experience (Sam-P3).*

The general feeling from participants was that sets which embraced diversity during the BDAL were able to hear the different viewpoints and harness the strengths from each team member. An example of this included:

*I realised that diverse viewpoints are important and I realised in BDAL that people are not the same as me and I needed to be able to deal with them and them not being the same as me is a strength (Luke-P3).*

As a way of managing diversity in the set, most participants learnt to identify each other’s strengths and apply these strengths to the BDAL set:

*We found that we all had different strengths and weaknesses and we all had varied experiences which we could draw from (Odwa-P3).*

*Each person in the group has value to add in their own way, that was a big learning for me (Logan-P3).*

The findings in the hand drawn images indicated that those teams who recognised that each participant contributed something different to the set

benefitted from the diversity in the team. For example Rhys-Ps mentioned that initially, the set struggled with diversity but later on moved past the conflict to become a strong team, which he drew in Figure 5.6.

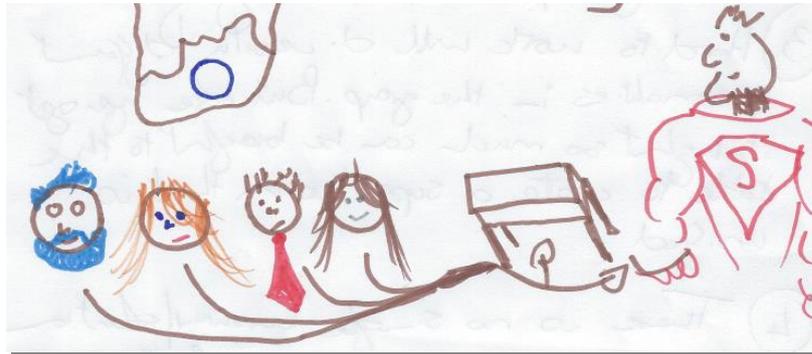


Figure 5.6 A strong team (Rhy's hand-drawn image)

Sam-P3 concluded that diverse teams had better ideas, as can be seen from his hand-drawn image, Figure 5.7. It is likely that the diverse team contributes to idea generation and supports Gherardi's (2001) suggestion that multiple perspectives create new knowledge.

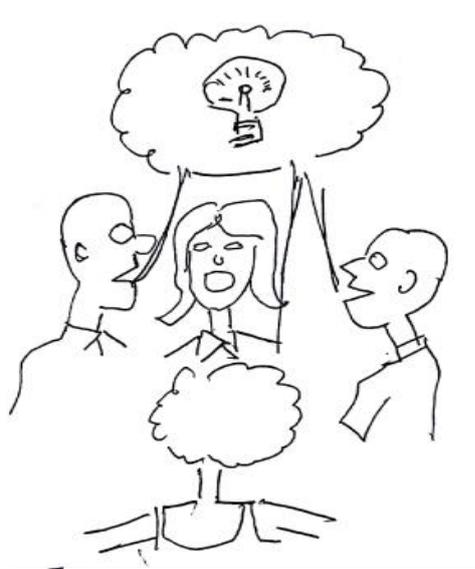


Figure 5.7 Diverse teams have better ideas (Sam's hand-drawn image)

In addition, most participants felt that they were able to apply learning from working in a diverse set back in the workplace. For example:

*For me, to embrace diversity and team dynamics and going back to my own work team, because we are all senior people and everyone is opinionated. The stuff I have seen and the fact that they are introverted does not mean they are not contributing, they are just taking time (Rhys-P3).*

The analysis indicates that the participants understood the value of diversity in the team and that different people contributed in different ways to the set; this understanding was not only applied to the BDAL set but also transferred to the work team. It is evident from the findings that if participants are able to apply learning from the BDAL experience at work, then this is an indication that BDAL impacts not only the individual in their set but also their team back at work. This shows that there was breadth of learning, which is one of Hoggan's (2016) criterion for transformative learning.

Diversity also includes not having a set member or action learning coach who is an 'expert' on the topic that the group is aiming to solve. Otherwise, there is a tendency to expect one participant to solve a problem. It has been found that groups with no expert available tend to have a wider range of solutions (Conger & Toegel, 2002). Hambrick, Cho and Chen's (1996) claim that diversity is one of the key factors in setting an environment that enables transformative learning. Planning for diversity in the team set up before the BDAL starts is an important component of BDAL.

The second basic theme was *rules of engagement*. The basic theme rules of engagement can be linked to the following basic themes: *work in a team, collaborative environment, communication in the team, conflict that results from diversity, power balance in the team and accountable for the common goal*.

When dealing with a diverse team, rules of engagement in the form of a team charter was noted as an important activity for the set to agree on. If the set can set clear ground rules on how to learn and function as a team at the first meeting it can help participants to feel safe and be in the right mindset to learn (Crul, 2014). Pedler and Abbott (2013) concluded that sets need rules to create a supportive but thought-provoking learning environment. Action learning groups share many of the same characteristics as effective teams, including a clear, common purpose and accepted norms (Marquardt, 2004). Participants mostly concluded that sets that had clear rules of engagement had a good starting point to work as a team.

*What do you mean by excellent, or do you mean very good? What does excellent mean? How do we deal with conflict in the team? How do we deal with somebody slacking off in the team? We were very detailed in that. We had a very good base to start with. You need to have a plan. I*

*love plans. I realise if we were on the same page with the charter, if we had a plan that we were all happy with, then we would be able to use that to move us forward (Fatima-P3).*

Setting rules of engagement is not new to BDAL; however, the findings indicated that those sets who adhered to rules of engagement and lived them as part of their values, experienced less frustration and conflict in their set when participants compared their sets to other sets on the management development programme.

The BDAL set consisted of members who are on an equal management level; in other words, there is no organisational hierarchy present. Revans (cited in Pedler & Abbott, 2013) recognised that peers need to talk to one another as equals during action learning, as the coach is merely a facilitator and does not make decisions regarding the business challenge. However, this is not an easy process as most participants expressed how difficult it was to work in a group of peers who are all in senior management positions. If they had clear rules of engagement that the set adhered to, it facilitated the guidelines for communication. Participants mentioned that the first step in setting rules of engagement was to be respectful of set members and their opinions:

*We're a group of peers. I focused on making sure there was mutual respect. Because telling people what to do all the time doesn't really get the best results (Fatima-P3).*

*When working in a team of peers you need to be more diplomatic, as you are not the manager, so you can't tell the group that something needs to be done, as you need to get everyone aligned (Sam-P3).*

In addition, it is desirable for the rules of engagement to include a common goal. Teams that had a common goal seemed to understand each other better and created a collaborative set environment. As Mbali-P3 said, "*collaboration can make the team work beautifully.*" However, achieving collaboration was a challenge due to the diversity in the team:

*We all come from different backgrounds, different parts of the business, but we come together for a common goal and how do we reach that common goal? (Carmen-P3).*

*You start to learn people's personalities and with five strangers put into a group to achieve a common goal, you can't do that without at least understanding each other to an extent (Fatima-P3).*

For example, a common goal was also illustrated in Prisha's-P3 hand-drawn image, Figure 5.8.

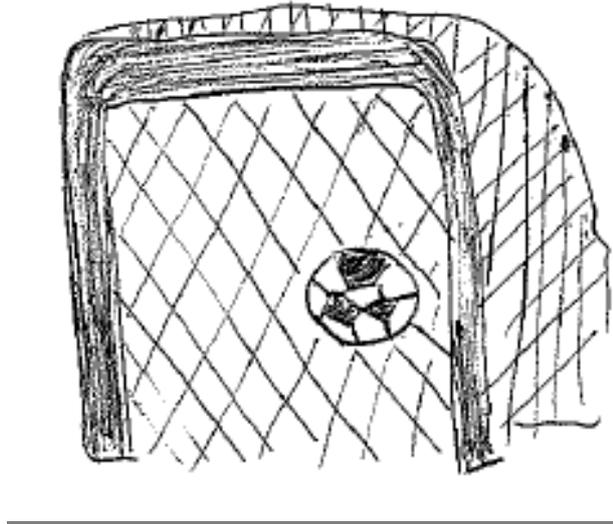


Figure 5.8 Common goal (Prisha's hand-drawn image)

Not only did the set need to agree on a common goal, but they needed to hold each other accountable for this goal. The findings indicated that most participants felt that even if they did set a common goal, the set did not always hold each other responsible for the goals, as set members disregarded goals, which resulted in feelings of unnecessary frustration amongst members:

*He didn't come through. I think it's a matter of just persevering and also establishing communication. I'm not sure we kept everyone accountable (Julian-P3).*

*We needed to be answerable to a common goal and hold each other accountable, we did provide feedback to one another. But we did not hold each other accountable that never happened (Sandy-P3).*

Those sets that did set rules of engagement that included a common goal that they were all accountable for becoming strong teams who were able to tackle the BDAL business challenge. Fatima-P3, in her hand-drawn image, drew how strong the team was due to the time they spend setting rules of engagement at the beginning of the BDAL journey, Figure 5.9.

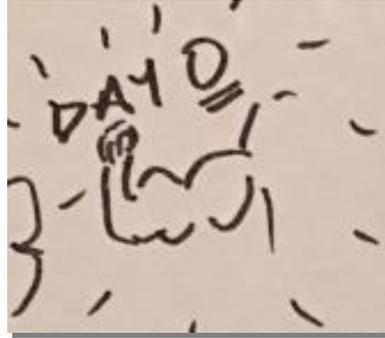


Figure 5.9 A strong team due to the rules of engagement (Fatima's hand-drawn image)

If a set has common shared goals, it improves the possibility of achieving its objectives on time and reduces internal conflict (Marquardt, et al., 2010). In this present study, those sets that had clear rules of engagement were stronger teams as they seemed to experience less conflict than those teams who did not hold each other accountable for achieving the goals:

*Having people with different opinions tends to bring conflict at times. There was an agreed and aligned goal, as long as everyone spoke towards the objective and we all understood the objective and we did not deviate from the end game. One thing about having different opinions, we had to have ground rules in place and we put these in place before we met as a team. The ground rules guide you so that we were all aligned, we removed the tension (Sam-P3).*

*I think we took the task very seriously. The charter became the foundation of our team. We picked a name we all agreed on, we picked values for our team, we picked goals for our team, and we focused on the semantics (Fatima-P3).*

The objective of setting rules of engagement is to create a safe space to learn. Edmondson (2002) confirmed that psychological safety takes place when the set believes it is safe for interpersonal risk taking. The results from Edmondson's (1999) research reinforced the idea that team psychological safety affects learning behaviour, which in turn affects team performance. Participants in this present study concluded that a safe space was important; this was achieved via continual contact with one another, which was one of the rules of engagement, for example: *"The team created a safe space and communicated a lot. When you talk about issues you demystify the assumptions."*

Communication started with the rules of engagement, and findings indicate that those sets members who kept in contact with one another lead to an environment of understanding. Understanding leads to a closer connection with the set members, sometimes with specific members and other times, with all members.

To conclude, the findings on the global theme of preconditions for transformative learning in BDAL, indicate that participants need to show learning agility (willingness and ability to learn) and create time for learning. In addition, the participant does not have to experience the BDAL alone as supportive relationships with the line manager, colleagues, people in their personal life, the BDAL set and the action learning coach, can be established before the BDAL starts and that these relationship need to continue during the BDAL process and even after BDAL has been completed.

Team conditions, which include diversity, are a key success factor Diversity in the team enables different viewpoints to be shared and questioned from different perspectives which is necessary to encourage transformative learning. However, the ability to manage a group of peers is challenging, so rules of engagement are required. Rules of engagement entail making all set members accountable for the common goal and plan. The findings support Marquardt, et al. (2010) conclusion that all BDAL sets need to have: clear and meaningful goals, strong communication skills, openness, and ability to manage conflict.

### **5.3 GLOBAL THEME: ACTIVE REFLECTION ON SELF AND OTHERS**

This global theme on “active reflection on self and others” takes place during the BDAL project. It included the following organising themes: *reflection is a new skill, role of the action learning coach, tools applied, stop, listen to understand, comfort levels of questioning and moments of insight*. The following organising theme of the *role of the coach and tools applied* are linked together as the action learning coach applies tools to enable reflection. The word *coach* was later changed to *facilitator* as *facilitator* describes the function that is played in BDAL. The network diagram for this section is seen in Figure 5.10.

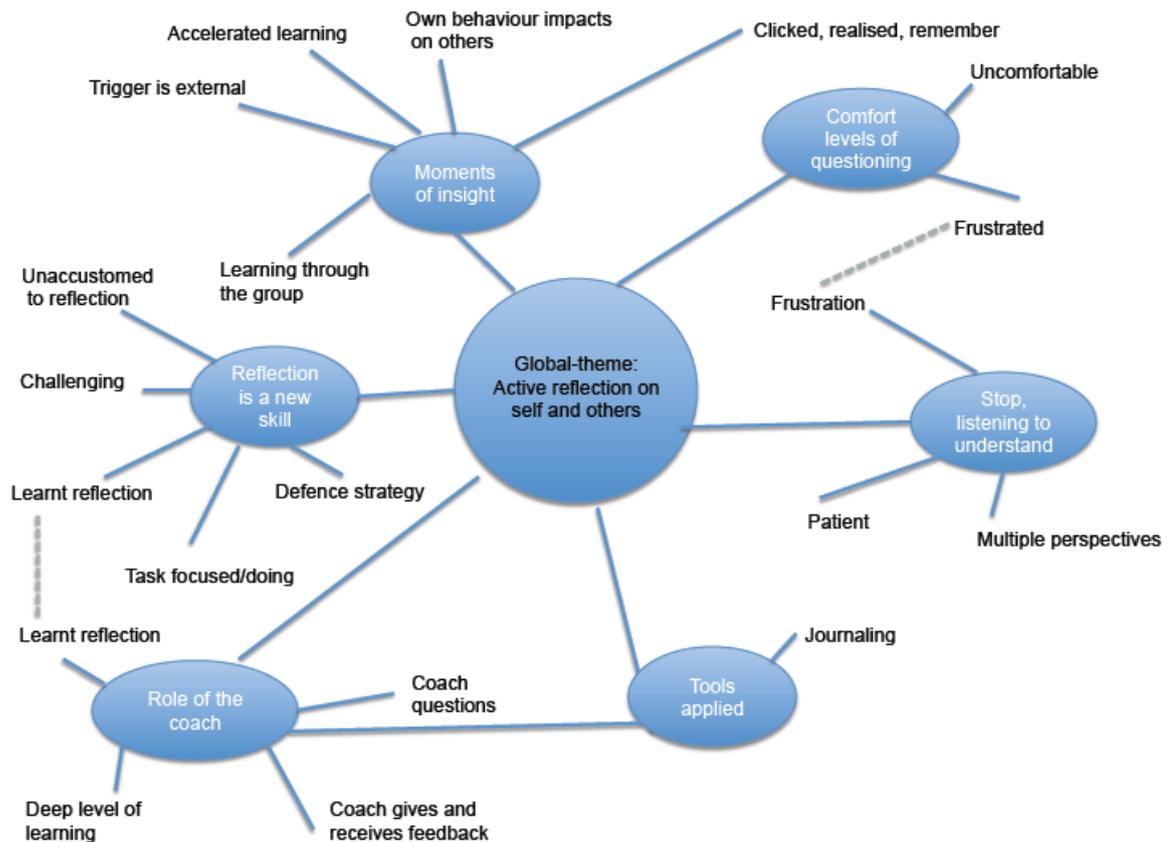


Figure 5.10 The network diagram for active reflection on self and others

This global theme was called “active reflection on self and others” as it is an indication of a higher level of reflection, which Jacobs (2008) calls ‘reflexivity’. “Reflexivity compared to reflection takes place within the ‘doing’ and implies the ability to reflect inward towards oneself ... outward to the cultural, social, historical, linguistic, political and other forces that shape the context of the inquiry” (Jacobs, 2008, p. 230).

In BDAL, the problems are complex and result in the participants being engaged in double-loop learning, which involves arduous reflection (Yeo & Gold, 2011). Argyris and Schön (1996) see double-loop learning as a foundation to a deeper level of reflection as participants change their mental models to decide a subsequent action. Reflection was a leading feature of transformative and action learning in the literature and was endorsed in these research findings. In this present study, participants seemed to understand that reflection was necessary and beneficial, for example Sandy drew a mirror with the words *courage* and *reflect my truth not your truth*, as seen in Figure 5.11 to

represent the benefit of reflection as Sandy-P3 identifies “*your truth*” which implies that reflection leads to self-awareness, which is an outcome of transformative learning (Hoggan, 2016). In addition, reflection is linked to Boshyk’s (2011) BDAL seven dimensions of learning.

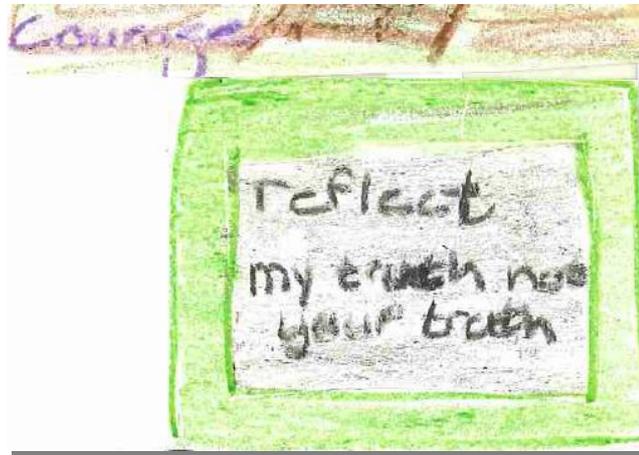


Figure 5.11. Reflection enables insight on self (Sandy’s hand-drawn image)

On a similar vein, Odwa-P3 drew her picture as a system, Figure 5.12, where she emphasised the importance of reflection as it allowed her to delve deeper and recognise inter-connectedness of aspects:

*As within each system there is another system. You can never go deep enough. It has also taught me the ability to question why. To look deeper, not just on the surface. So, when something happens, to ask why is that the case? Alright, okay, but why? Knowing how things are inter-connected and how things are linked. But also having to dig deeper. There’s always two sides to a story (Odwa-P3).*

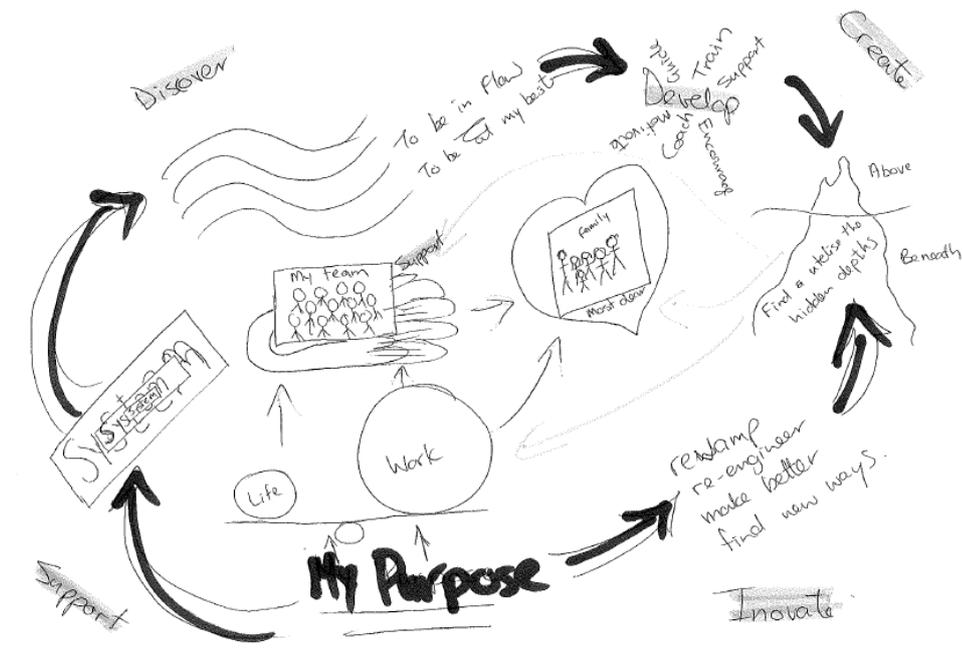


Figure 5.12 Bigger picture, the system (Odwa's hand-drawn image)

A key part of BDAL involved reflecting on the learning that had taken place. Learning and thinking involves reflection; individuals reflect to learn and learn as a result of reflecting. This can be termed 'reflective learning' where the aim is to learn from current or prior experiences (Moon, 2004). Reflecting opened up personal difficulties, such as the need to be in control of the BDAL project and taking accountability for the goals set. This awareness of their personal dynamics is a characteristic of critical reflection (Rigg & Trehan, 2004).

What is important in this present study was to try and understand what enabled reflection as part of transformative learning. As per the literature, reflection is a key success factor in both action learning and transformative learning. The findings support Passfield (1996) who maintained that through collaboration and reflection, the participants experience transformation. The findings confirmed that reflection is a skill that includes taking time to stop and question oneself, others and the organisation. Participants questioned various aspects, namely, their own behaviour, set member's behaviour and the wicked business challenge. It was about creating balance between finding solutions to the wicked business challenge whilst as the same time, learning about oneself, others and the organisation. Reflection is seen as fundamental skill in adult

education, and more specifically, in fostering transformative learning (Kreber, 2012).

### 5.3.1 Organising theme: Reflection is a new skill

The organising theme *reflection is a new skill* included the following basic themes: *unaccustomed to reflection*, *task focused/doing*, *learnt reflection*, *challenging* and *defence strategy*. The first basic theme was *unaccustomed to reflection*. Most participants mentioned that they enjoyed reflection during BDAL as it gave the participants time to process and integrate information: “*I like having time to think stuff through as it gives you time to assimilate*” (Nsikelelo-P3). However, even though they enjoyed reflecting, it was not an activity that participants were used to completing.

The second basic theme was *task focused/doing*. Most participants mentioned that they found reflection a new experience and that even though they realise that reflection is important, they were unaccustomed to taking time to reflect, as they are normally so busy “*doing*.” The BDAL can become a task and as a result, the task can overwhelm the process of learning (Conger & Toegel, 2002). Findings indicated that when participants were able to be mindful and stop thinking about home, work and how much time the BDAL was taking they were able to take time to think about the business challenge, their personal challenge and other people. BDAL can be solution and task focused but without reflection, there is limited learning (Bourner, 2011b).

The third basic theme was *learnt reflection*. Mindfulness is important as teams should not be too busy completing the BDAL project as a task and forget to take time to stop and think about their learning: “*We have to stop and be mindful, we are too busy doing. It taught me to be more mindful.*” Mindfulness is a skill that the action learning facilitator can encourage as this could set the stage for transformative learning. Reflection is not intuitive in participants (Wald, Borkan, Taylor, Anthony & Reis, 2012). Therefore, there is a prospect for the action learning facilitator to emphasise potentially transformational elements to initiate transformational learning (Ajoku, 2015, p. 8).

In this present study, there were multiple examples of reflective practice that participants transferred to their lives and workplace. Examples of this included:

*Three months ago, I started a new thing. I have put together a morning routine where I reflect on my behaviour. If I have been thinking about something for the last day and I have not done anything about it, I add it to my to-do list (Luke-P3).*

*I think about things that I've done, the way that I've done it, and then ask the question why. It's all about behaviour. I don't necessarily spend enough time doing that. To get quiet. Whenever something happens again I can pick up on it immediately. I think about what is in my control and out of my control. I physically need to make time for reflecting. Let's just get quiet (Sandy-P3).*

This is an indication that many participants learnt how to reflect during the programme and have continued to apply reflection in their lives and workplace. In addition the application of reflection to varied contexts meets Hoggan's (2016) criterion of breadth in transformative learning. Ajoku (2015) argued that not all participants have the ability to participate effectively in reflective discourse, as they have biases that restrict their ability to learn, and this leads towards the path of non-transformative learning. Rigg (2008) argued that more emphasis is needed on reflective space for sense making. In the processes of her PhD, Ruane (2016) asks if there is a benefit to action learning coaches in further developing the themes of reflection, emotion and transformation with the purpose of developing more effective programmes, therefore reflection could be developed into the programme design. It is, therefore, noteworthy that the action learning facilitator played an important role in the development of active reflection on self and others during BDAL to enable transformative learning. (Learnt reflection was also a basic theme in the organising theme of the role of the coach).

The fourth basic theme was *challenging*. Most participants seemed to understand the benefit of reflection, however, some found reflection challenging. Participants mentioned that reflection was challenging. For example, Rhys-P3 said *"I battled to reflect ... this is difficult for me."* Some participants mentioned that not all their set members were willing to actively engage in reflection as they found reflection challenging. If reflection does not take place, transformative learning cannot transpire: *"Not everyone transforms."*

*I think it's got to do with the extent to which you reflect inwardly. Not a lot of people can do that" (Mbali-P3).*

There are three types of reflection: content, process and premise reflection (Mezirow, 1991). It is premise reflection that creates the opportunity for perspective transformation (Mezirow, 1991). Reflection during the BDAL included many examples of content reflection in that the participants reflected on their own actions and how these impacted on the set as well as reflecting on the BDAL wicked business challenge: *"You learn to reflect. I would have a reflection on myself and I would have a reflection on the BDAL" (Fatima-P3).*

The fifth basic theme was *defence strategy*. Some participants avoided the tension during BDAL, as a form of defence strategy, and just worked on the BDAL as a task. If participants are defensive, reflection is less likely to take place:

*I was like, just get the work done. We were so focused on getting the work done that we were very often not able to lift ourselves out of the weeds. I avoid confrontation at all costs, so that is why it was something I had to learn (Luke-P3).*

*There was tension, but everyone just avoided it in order to get the BDAL done. We managed to park that (the group split) in order to do the work, there was one day when I said come on guys, lets pull it together and I lost my cool (Carmen-P3).*

What is significant from these findings is that participants recognised the importance of reflection in leading to greater self-awareness and that participants generally enjoyed the reflective practice that the action learning coach built into the programme. It is important that the coach guides reflection as most participants felt that reflection was a new skill for them. It is noteworthy that many participants did learn how to reflect with the help of the action learning coach. This emphasises that 'learnt reflection' is a key responsibility of the action learning coach who enables opportunities for reflection to take place. When reflection is a new skill the role of the action learning coach is essential in facilitating and enabling reflection.

### **5.3.2 Organising theme: Role of the coach and tools required**

The organising themes of the *role of the coach* and *tools required* are joined together under the heading *role of the coach* (action learning facilitator). The

role of the coach included the following basic themes: *coach gives and receives feedback, coach questions and journaling*. The basic theme of *learnt reflection* was discussed in the section on *reflection is a new skill*.

Action learning gives participants flexibility in the way they decide their learning process based on the help of an action learning coach (Yeo & Gold, 2011). The action learning facilitator creates the environment for learning, with an emphasis on reflection: “*The action learning coach stayed focused in the present, which is a rare quality. To be real, to invite and to be present in the moment during reflection.*” The action learning facilitator needs to foster an environment that is safe, confidential, and empowering so that participants can be involved in reflection and powerful actions (Sofu, et al., 2010). Mostly, the participants felt that the coach played an important role in guiding them to think differently: “*The reflections that (the action learning coach facilitated) helped me think about what I would do differently.*”

The first basic themes were *gives and receives feedback and coach questions*. Reflection was encouraged when the coach gave feedback and asked questions. The action learning coach helps participants to reflect by giving feedback. The value of feedback from the action learning was confirmed by many participants:

*He (the action learning facilitator) wanted more out of you so he gives you that feedback and stretches you more. If you are content and no longer hungry, you lose that stretch (Logan-P3).*

*The coach picked up something about each individual. She was very open-minded, and she could pick up on issues. I realised what she said was the truth and I didn't want to see myself in that way (Louie-P3).*

The findings in this present study support O'Neil and Marsick's (2014) statement that the action learning coach seeks to probe for a deeper level of learning. This is achieved when the coach facilitates giving feedback to participants (Cassey, 2001; O'Hare et al., 2004). In addition to feedback, questioning is one of the most employed interventions by the action learning coach (O'Neil & Marsick, 2014), and these questions need to be both supportive and challenging (O'Neil & Marsick, 2007). Reflection is often bound to questioning (O'Neil & Marsick, 2007). It is important that the coach stays mindful of each and every participant in the set and asks probing questions:

*He asked the right questions at the right time. He understood, he was firm, gentle and human (Mbali-P3).*

*Called on you to reflect using questions. The concept of learnt reflection was consistent (Fatima-P3).*

An effective action learning coach acts as a facilitator and applies techniques that promote reflection, which is achieved via questioning, rather than making statements to guide the learning (Conger & Toegel, 2002). Prior research (Jensen & Joy, 2005; Murphy, 2004) has found that participants need guidance on how to reflect. The role of the action learning facilitator is to help the participants feel comfortable with the reflection process. The findings in this present study confirm that through feedback and questioning, the action learning facilitator is able to stretch participants' thinking and awareness about themselves. Authentic feedback can help the participant recognise and highlight where change and development are needed. To summarise, the action learning facilitator can encourage 'learnt reflection' with the participants.

Questioning insight is at the heart of Revans' (1983) formula for learning ( $L = P + Q$ ). The purpose of questioning is to bring to light novel thinking and new solutions to the business challenge as it seeks to find answers to problems. Participants end up questioning themselves, their set members, their organisation and other organisation's (during the outside-in practice of benchmarking where teams question the business challenge and gain different perspectives). Questioning also enables the participants to delve deeper in the process, situations and activities in the workplace, which is systems thinking. As a result, questioning alters mind-sets. It is not only the coach when questions but they also encourage the set members to ask each other and the business questions.

The second basic theme was *journaling* and *deeper level of learning*. The findings support Stewart et al.'s (2008) observation that keeping a journal is a skill that requires feedback to develop. Many participants mentioned that the tool they used to assist in reflection with the help of the action learning facilitator was journaling:

*At the beginning of the programme we were given this journal. We were asked to keep our reflections and I literally did that from day one until the end. I found it very valuable. The way that I did this was to draw, sketch*

*and do rich pictures. I would do that for my 'aha moments'. I asked myself three questions: As a person how does this impact me, then my organisation and then the BDAL project (Fatima-P3).*

*Journaling helped a lot, as it helps me grow; if I make a mistake, okay, don't do that again. Please tell (the action learning coach) that it worked, it was hard (Carmen-P3).*

A few participants mentioned that they have continued the practice of journaling back in their daily lives. Journaling enabled participants to write down their thoughts, feelings and ideas and encouraged them to think about themselves and others, thereby proving a valuable reflection tool. Mann and Clarke (2007) noticed that writing, as a form of reflection, helps promote deeper learning.

### **5.3.3 Organising theme: Stop, listen to understand others**

This organising theme of *stop, listen to understand others* included the following basic themes: *frustration, multiple perspectives* and *patient*. In BDAL individuals need to develop their team competencies should they wish to solve complex business problems (Van Der Vegt & Bunderson, 2005). The first basic theme was *frustration*. A team competency that was noted in this present study was that those sets who stopped and listened to understand one another worked well together, thereby reducing levels of frustration:

*I have always been someone who talks more than I listen. During the BDAL time, it was initially frustrating, but I learnt to listen more than I spoke. Communication is key. When we felt frustrated or someone could not do something they explained the reasons, which decreased the frustration levels (Logan-P3).*

*We listened to what others really had to say and appreciated that we didn't know everything and by listening we learnt that we had to be very clear when we communicate. With that, it allowed us to synergise better as a team and look beyond our own responsibilities, drop our guard, and expose the softer side of ourselves to a group that you felt ultimately were your brothers and sisters (Mark-P3).*

Findings indicated that teams who made space to listen to one another's inputs and ideas experienced less frustration. In action learning, the process discourages using one's normal instinct of making statements and judgments, instead, listening and reflecting are the necessary requirements (Marquardt, et al., 2010). The second basic theme was *multiple perspectives*. Listening and reflecting allowed the participant to see different worldviews via hearing multiple perspectives, which is an outcome of transformative learning (Hoggan, 2016).

Through listening to their peer group, many participants mentioned that they have learnt to be more patient. Examples included:

*BDAL has certainly assisted me to work through patience better. It is something that I constantly work towards, but I am much better (Odwa-P3).*

*Patience with them (the set) in terms of what we're trying to achieve (Sally-P3).*

This present study supports Carnevale, Gainer and Meltzer's (1990) findings that tolerance and listening is essential for successful groups. If the members do not listen and show patience, then the frustration levels may be too high to encourage individual transformative learning.

#### **5.3.4 Organising theme: Comfort levels of reflection**

The organising theme of *comfort levels of reflection* included: *uncomfortable* and *frustrated*. The first basic theme was *uncomfortable*. Even though participants, in hindsight, enjoyed reflection the process of reflection can result in an uncomfortable experience for participants. However, being uncomfortable is a fundamental part of how learning transpires in action learning (O'Neil & Marsick, 2014). In an action learning context, Vince, et al. (2017) summarise learning as the process of questioning existing knowledge, taking action based on this questioning and then reflecting on the action.

Through questioning, the participant is able to engage in action learning, but they need to be comfortable in this uncomfortable space (Robertson & Bell, 2016). Many participants mentioned that continual questioning caused frustration and made participants feel uncomfortable:

*During the BDAL process we asked a lot of questions. We truly questioned everything. Re-do, re-think, why, why, why? For me it felt uncomfortable constantly questioning. If we didn't go through all that questioning, each one's interpretation would have been totally different. Only in hindsight, you can say, oh okay, it was good to raise all those questions and constantly ask those questions. Having a questioning mind, helps understand your topic better and to understand your people better (Prisha-P3).*

The second basic theme was *frustrated*, which was also included in the theme *stop, listen to understand*. If participants did not apply a questioning approach to reflecting and instead used statements, then there was the potential for frustration to arise. Statements can lock participants in the present and defend

what they already know (Allman, 2001). An answer is constructive only in so far as it leads to more interesting questions. By asking interesting and fresh questions, participants opened themselves to new understandings. Participants who were open to challenging themselves and others asked a lot of questions. Participants who positioned themselves as experts did not allow themselves to question and did not challenge themselves nor the team enough:

*They felt they knew everything and could just start doing the project, because we all have a lot of experience. So, there was this implied, kind of thing that you know how the business works. We really lost focus and direction, completely, we didn't want to know (Julian-P3).*

Mezirow (2001) advocated that reflective discourse needs to take place to encourage transformative learning and that reflective discourse is as a result of questioning. From the findings, it can be seen that if questioning took place during the programme, participants were able to confront each other's assumptions and understand what these assumptions were based on. Without reflective discourse, it is unlikely that an act of learning will be truly transformative (Feinstein, 2004).

In summary, the findings on the comfort levels of questioning support Billett's (2011) comment that reflection helped participants to understand and make sense between what they know and what they experience, even if they find the process of reflection unsettling. It is recommended that reflection should be done throughout the SMDP and not only on the last day of the programme. If reflection is only completed at the end of the programme, the moments of insight could be missed (Conger & Toegel, 2002).

### **5.3.5 Organising theme: Moments of insight**

The organising theme of *moments of insight* included the following basic themes: *clicked, realised, remember, accelerated learning, own behaviour impacts on others, learning through the team and trigger was external*. Active reflection can result in a moment of insight. BDAL itself can be the disorienting dilemma; however, during BDAL, there can be 'aha' moments that trigger insight and have the potential to lead to transformative learning. The findings from the research showed that discovery can take place as a result of an 'aha

moment' or moment of insight. These moments "alter and shape the meanings persons give to themselves" (Denzin, 1994, p. 510).

The first basic theme was *clicked, realised, remembered*. Noting the language used in the interpretive stories, the participants had different words to describe their moments of insight. These words included: *clicked, realised, aha moment, moments to remember or events*:

*Until I clicked, it was the inter-relationship within the group that really helped me in seeing that* (Mbali-P3).

*Until I clicked that you have to listen to where they are coming from and the challenges they have* (Sandy-P3).

Some participants used the word 'realised' to describe their 'aha moment':

*I would help them or guide them, but I would make it their responsibility to do what they're supposed to do. I just realised that you can't do everything for everybody* (Charmaine-P3).

*I realised that diverse viewpoints are important and I realised in the BDAL that people are not the same as me and I needed to be able to deal with them and them not being the same as me is a strength* (Luke-P3).

Some participants used the words "aha moment":

*I tried to understand other people's views. Thinking about authority, upwards and downwards. I think I got pretty good at it. You have to work differently. It was really, really powerful. That was the strong aha moment* (Fatima-P3).

*A trigger that I'm not aware of comes to the fore. I have this 'aha moment', it is something that she said that really clicked. That the moment of realisation of self-awareness* (Mbali-P3).

The second basic theme was *accelerated learning*. Many of the hand-drawn images indicate that there was an 'aha' learning moment that accelerated the learning for the individual participant. An illustration of this is included in Figure 5.13 where Mbali-P3 even wrote the word "aha, got it" in her hand-drawn image.



Figure 5.13 Aha moment (Mbali's hand-drawn image)

Prisha-P3 spoke about systems thinking as her 'aha moment' when she realised that things are interrelated; she drew this in her hand-drawn image in Figure 5.14.

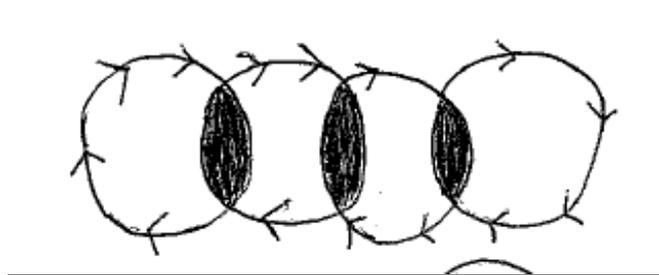


Figure 5.14 Everything is interrelated (Prisha's hand-drawn image)

Other participants spoke about moments to remember or events they will never forget as these were *aha* moments:

*There was one night, I will never forget it. I cried, and I said how could you do this to us, I was very upset. I was very overwhelmed and fatigued. But he was right. In his own gentle way, he was firm, and we had a love/hate relationship with him. Afterwards I apologised to him (Carmen-P3).*

*The workshops (which were a combination of classroom discussions and BDAL set meetings) were an epiphany for me and understanding that I needed to rebrand or re-craft myself for my career. The good thing about the workshop is you get to use your learning from the workshop when you meet with the BDAL group and apply the learning. Being friendlier, finding touch points and simply having coffee with someone opens more doors than sending an email (Sam-P3).*

The third basic theme was *own behaviour impacts on others*. The findings indicated that reflection allowed the participants to think of their own behaviour and how it impacts themselves and others. This refutes Newman's (2014) comment that reflection is narrow as the participant thinks predominantly about the self. What was noteworthy in this present study is that most participants described their moment of insight as the realisation that the learning was through the team and that their own behaviour impacted upon the group:

*Aha moment: they are here as a group not individuals and that they all have a part to play (Fatima-P3).*

*I'm individualist, my preference is to work as an individual. I had to learn to work as a group (Charmaine-P3).*

The fourth basic theme was *learning through the team*. Findings indicated that those participants that were not able to make this mindshift about learning through the team felt frustration. Making a mental shift from the individual to the group enabled participants to see the bigger picture and work towards a common goal in the BDAL project. This is the paradox, as the BDAL is about group work, but as Louie-P3 said, *"the journey to achieve this is about yourself, even though it is an organisational BDAL."*

The fifth basic theme was the *trigger was external*. A moment of insight can arise out of any moment, but most participants agreed that the trigger was external, emphasising the importance of the action learning facilitator in reflection: *"An external catalyst, a prompt, a jolt that was facilitated by the action-learning coach."* As indicated by Henderson and Bastnagel (cited in Denmark & Paludi, 2018), the trigger can be gradual or over time. In this present study, participants had varying responses. Some moments of insight took place quickly and others, over time. Examples included:

*I want to pinpoint it to a specific event, but I can't, it just happened over time. Gradually over time (Prisha-P3).*

*A sudden association brought about the 'aha moment' (Mbali-P3).*

Moments of insight act as a catalyst in helping participants realise that they needed to change their worldviews. They enabled participants to make meaning from the BDAL experience. *Meaning-making* is a term used by Mezirow (1991, p.11), which is simply "making sense of or giving coherence to our experiences.

Meaning is an interpretation.” When participants are able to improve their capacity to make meaning through a moment of insight it turns the subjective into the objective (Kegan & Lahey, 2009; Nicolaidis & Yorks, 2008). The literature presents two different views in that this moment of insight can be both sudden or gradual, Brock (2010) encourages educators to focus on the ‘aha’ type of learning but also consider the more gradual change. This implies that transformative learning can take place long after the BDAL project has been completed. Participants can benefit from looking back at the BDAL experience and share their learning with the set and the action learning coach, as this may strengthen the potential for change.

In conclusion, active reflection on self and others is a new skill that participants need to learn with the help of the action learning coach. Participants need to stop and listen to understand others during reflection even if it is an uncomfortable place to be in. If the participants are mindful, they will recognise moments of insight when they take place, which has the potential to lead to transformative learning.

#### **5.4 GLOBAL THEME: SENSE OF CONTROL**

The next global theme was “sense of control.” Working in a diverse group of peers and trying to solve a wicked business challenge creates a sense of unease (Willis, 2012); therefore, participants attempt to deal with this uncertainty by trying to gain a sense of control. To manage the unease requires inter-agency collaboration, joint working and a deliberate learning strategy (Grint, 2008).

Critical action learning is the type of action learning that is associated with emotions and power relations (Pedler, 1996); however, in this present study, there was also evidence of power struggles and intense emotions whilst trying to gain a sense of control. Power dynamics and relationships both enable and constrain action and learning (Trehan & Pedler, 2010). This global theme included the following organising themes: *unease*, *relinquish control show vulnerability* and *intense emotions*. The network diagram for this section on sense of control is seen in Figure 5.15.

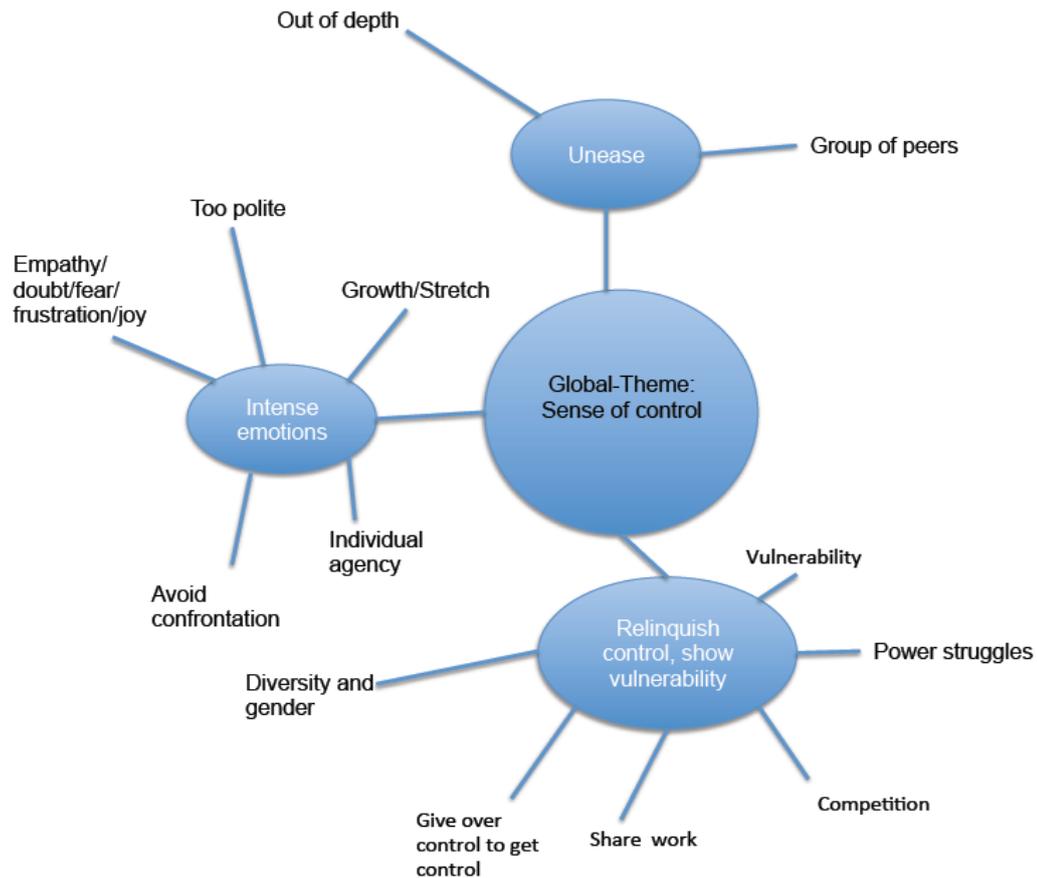


Figure 5.15 The network diagram for the need for a sense of control

If participants wish to work in a collaborative set, they need to let go of trying to control and show more vulnerability. Vulnerability is defined as being emotionally available and open (Whiting & Cutri, 2015). Vulnerability implies that the participants display emotional openness (Kelchtermans, 2009). There is value in the process of open conversations where participants can attend to their emotions (Whiting & Cutri, 2015).

#### 5.4.1 Organising theme: Unease

The organising theme *unease* consisted of the following basic themes: *out of depth* and *group of peers*. A learning experience can trigger an emotional reaction such as fear (Haesen, Beckers, Baeyens & Vervliet, 2017). The first basic theme was *out of depth*. Fear is the ensemble of emotional reactions that are triggered when danger is imminent. In the BDAL, scenario unknowns around the learning process can be perceived as danger. For example, “*I learnt that when I am not familiar with a topic, I get extremely uncomfortable.*”

Participants need to have a significant shift in their perspective on how learning takes place as they are responsible for their own learning (Rifkin, 2003). This is often new for participants so they feel uneasy and experience intense emotions, which can result in them trying to control the environment and others. To cope with the unknown and unease, participants try and control the set environment in which they are working. Trying to control others and the environment is a form of defence mechanism as the participant is trying to ward off emotional upsets (Horowitz, Cooper, Fridhandler, Perry, Bond & Vaillant, 1992). Numerous participants talked about trying to gain control when they felt out of depth and did not want to admit their fear. For example:

*I felt out of my depth and this is an uncomfortable place to be as I was used to being the one in control. I had to let go of being in control. I am a bit of a control freak and I didn't realise how much of a control freak, I felt out of my depth (during BDAL) and this is an uncomfortable place to be as I was always the one in control (Nsikelelo-P3).*

The second basic theme was a *group of peers*. The turning point for many participants was when they stopped trying to control the environment, including the other set members. Through relinquishing control, participants were able to hear what the members in their set had to say and realise the value each set member added to the project:

*I wanted control over everything. During that entire process I just realised, you know, I need to let go. I can't have control over every aspect because I'm also limiting other people's growth with all this control that I'm trying to have (Prisha-P3).*

*It taught me to allow other people to take control and it does not mean you are not good enough (Carmen-P3).*

It is hard to learn in agreement (Hollingsworth & Dybdahl cited in Clandinin, 2007), which implies that learning in a team is challenging. Nevertheless, this unease is necessary to create transformative learning (Feinstein, 2004). Conversely, there cannot be too much unease as volatility in power relations can promote role ambiguity and conflict (O'Toole, Galbraith & Lawler, 2003). Mezirow (1997) suggested that if learning is too comfortable, it is doubtful that participants will undergo transformative changes. Consequently, participants need to experience unease but this can't be too much for them, hence the paradox in BDAL.

#### 5.4.2 Organising theme: Relinquish control, show vulnerability

The organising theme *relinquish control, show vulnerability* consisted of the following basic themes: *power struggles, share work, give over control to get control, competition, vulnerability, diversity* and *gender*. The first basic themes included *power struggles, share work and give over control to get control*. Control can be linked to coercive power (French & Raven, 1959), which was evident when participants tried to enforce their own way of working. Many participants mentioned that their natural style was to take on work and complete the work on their own. Participants mentioned that they struggled with sharing work with set members, as sharing work made them feel out of control. Participants concluded that they had to let go of control to be more collaborative. The findings indicated that participants had to give over control to get control:

*One of the big changes was for me not to do it. I had to learn not to do that. Unfortunately, I did do that sometimes. I had to sit back and adapt to other people's styles and to adapt to their pace. That to me was very difficult (Charmaine-P3).*

*Not always needing to be in control. I need to adjust to the situation, and not just think what suits me, as I need to look at the bigger picture (Louie-P3).*

What is noteworthy in this present study is that power struggles are not necessarily a negative aspect of working in the set. The findings indicated that most participants mentioned that the “*power play*” helped them see what their strengths were and through adversity, they learnt about themselves:

*In that process, I remember vividly that this reinforced one of my strengths. I realised that I am a very strong facilitator. That strength shone through as a result of all the power play. What I focused on was making sure that we all came together and focused on the objective” (Fatima-P3).*

The second basic them was *diversity and gender*. Two participants were placed in teams where they were the only women in the set. Both women chose to take on the leadership position in the set. They both commented on the fact that they were the only women in the team, and this may have contributed to the power struggle within the team in terms of gender issues:

*I was the only female with four guys. It was a power tussle because I wanted to be a team leader and one of the other guys wanted to as well.*

*We had to bid or pitch for the job. I know that sometimes people had doubts. While I'm not a very political person, I'm aware of the politics. It's about your gender and I understand, when I see certain things, why they are happening. In a group of four guys I knew it was bound to take place, especially in the beginning. So, recognising it and being able to call on it, when needed, or ignore it (Fatima-P3).*

*I was the only female in a group of men which was difficult at times to take that step back and to say I am not going to stress about this, as I am giving my all and I am going to enjoy every moment of it (Louie-P3).*

In addition, one of the male team members also commented on the role of gender and control: *"This worked as people let go of their egos and acknowledge her and allowed her to lead them in terms of the structure, direction and effort."* These findings emphasize the importance of ensuring a diverse set at the outset of the BDAL journey.

The third basic theme was *competition*. Power struggles are a result of competition evident in the set. The BDAL is a group made up of peers, which is unusual in a work situation where there is normally an organisational hierarchy. Most participants are managers who are used to taking control in the workplace; competition led to a struggle for control in this present study:

*Initially, it was frustration, because I run my own portfolio, I run things my way (Rhys-P3).*

*We were all, with the exception of one person, heads of departments. We had a lot of bulls in one kraal (Mark-P3).*

Instead of a supportive learning environment, certain set members competed against each other. Sometimes the mindset seemed to be one of focusing on the self instead of the team. Competition in the team does not allow for participants to reveal their weaknesses as the environment is not safe:

*I am naturally competitive. So, I ... and I'm very ambitious. I never like working in teams (Sally-P3).*

*My team was very competitive. Well, actually two people in my team were a bit competitive (Prisha-P3).*

The findings on competition are an indication that the set can be a challenging environment for participants to work in. The fourth basic theme was *vulnerability*. One way of dealing with the set environment is to show vulnerability, which involves the process of self and mutual disclosure to the set. Findings indicated that if participants were able to stop imposing their own

views, stopped competing with and showed their vulnerability, the level of competition decreased:

*As we progressed, less and less of us imposed ourselves on others. We dropped our guard and exposed the softer side of ourselves to the group, who ultimately were your brothers and sisters (Mark-P3).*

*BDAL has taught me how much value other people can add to something that you are responsible for. Sometimes you think you are so wonderful on your own, but fail to realise how much more you can achieve with others (Logan-P3).*

Findings showed that numerous participants realised that they did not always have to have all the answers and show strength all the time, hence showing their vulnerability. Wesch (2012) suggests that a sense of shared vulnerability can increase a participant's empathy of others, which may help in understanding others. These participants were aware that they needed to be vulnerable and not try and control the environment.

Set members who were willing to be vulnerable and set aside the "power over" and instead applied "power with" others in the set (Berger, 2009; Woehrle, 1992) were able to manage their need for a sense of control. It is important for participants to recognise that it is acceptable to show their vulnerability if they wish to experience transformative learning. Krantz (2010, p. 198) argued "sophisticated work occurs when people can learn publicly, risking personal exposure in the service of developing shared understanding and collaborating in such a way that vulnerability is neither hidden nor pathologised." This reinforces the value of creating a safe environment so that trust is created for participants to how their vulnerability and experience depth in their learning, thus meeting one of Hoggan's (2016) criterion for transformative learning.

#### **5.4.3 Organising theme: Intense emotions**

The organising theme *intense emotions* consisted of the following basic themes: *empathy/doubt/fear/frustration/joy, growth/stretch, individual agency, too polite* and *avoid confrontation*. The first basic themes were *empathy/doubt/fear/frustration/joy*. Most participants experienced intense emotions as they progressed through the BDAL experience. They mentioned the following emotions in their story: *empathy, doubt, fear, frustration and joy*.

However, frustration was a common emotion and most participants admitted to feeling frustrated at some point during BDAL:

*For me this was out of my comfort zone. Tears were caused by frustration as your balance is out. It is also hard to take the criticism from the group, even though the group was compassionate (Carmen-P3).*

*The BDAL was a nightmare. I felt like I went through a nightmare. I would get so frustrated (Prisha-P3).*

These findings support Ruane's (2016) findings that intense emotions are apparent in action learning and are a normal part of the process.

The hand-drawn images also included many examples of frustration. Louie-P3 drew her feelings of being stressed and lost, and wrote the words "help, eish, breathe, can't be, huh, crazy, stay calm" on her drawing, as can be seen in Figure 5.16.



Figure 5.16 Feelings during BDAL (Louie's hand-drawn image)

There are many negative emotions that result from BDAL. However, there are also positive emotions that are often neglected in literature on learning (Jacobs, 2008). It was worth noting that most participants describe the beginning of the BDAL as "initially frustrating" (Julian-P3). Mark-P3 summarises this as:

*In the beginning, the BDAL was stressful as everyone has an opinion, even though we had no clue. If you look at my group we were all, with the exception of one person, heads of departments. We had a lot of bulls in one kraal. We were bound to have a lot of fireworks. This happened in the first two weeks, or so, of the interaction, as we wanted to draw the line and cast the vision. I think, as we progressed, less and less of us imposed ourselves on others. We listened to what others really had to*

*say and appreciated that we didn't know everything and by listening we learnt that we had to be very clear when we communicate. With that, it allowed us to synergise better as a team and look beyond our own responsibilities, drop our guard, and expose the softer side of ourselves to a group that you felt ultimately were your brothers and sisters (Mark-P3).*

However, these negative emotions did not seem to last through the duration of the SMDP as most participants saw the BDAL as a “journey” (Odwa-P3) which had a positive outcome: *“It was a good experience”* (Sam-P3) and *“I had a good experience during the BDAL. I had some amazing moments”* (Rhys-P3). Brookfield (1987) includes resistance, resentment and confusion that results due to critical thinking but also the joy and excitement that accompanies transformative learning.

The second basic theme was *growth/stretch*. Frustration is not necessarily negative as it can stretch the participant so that they learn more about themselves. It was evident that although there were high levels of frustration during BDAL, the participants needed the stretch to help grow and develop:

*If it was easy, I would not have learnt. If you don't have challenges, then you don't grow. There's method in the madness. Could it be easier? Absolutely, way easier. But then I still would have been where I was last year. So, I would have missed out on, on this personal growth. It actually does have an impact moving forward as well. Because I can't not see it now, I can't un-know (Sandy-P3).*

The third basic-need was *individual agency*. One of the reasons why the participants felt so frustrated was that some participants did not show individual agency. In other words, participants felt that other set members did not take accountability or do their part in the project, which is why the frustration levels were so high:

*There is no accountability. It is about raising the issues that are linked to communication and speaking to the data which gets the problem into the open. Then you can target the problem not the person. When you get two people to talk, they sort out the issue themselves, as things seem to become less important when they work together (Julian-P3).*

*Working in a team you have to really sit down and really listen to the opinions of your colleagues, a lot of frustration in terms of what we should do. We also had a problem of some people not doing their part in terms of the work we were doing. By the middle of the year, we started to gel as a group as we got to know each other (Rhys-P3).*

To emphasise this point, Sam-P3 drew the BDAL as saying “*tomorrow, tomorrow,*” see Figure 5.17. His set did not place a sense of urgency into completing the research, which he found frustrating.

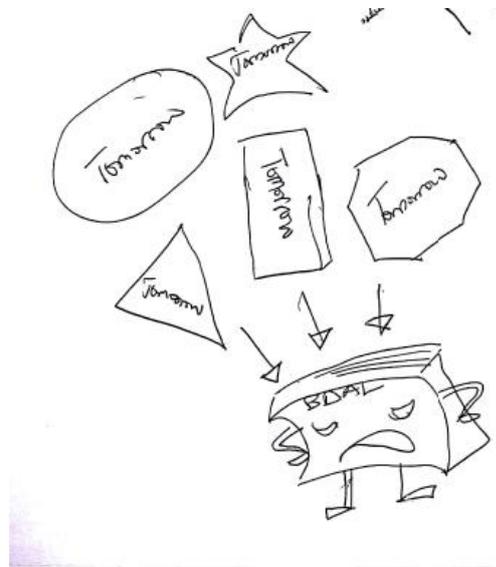


Figure 5.17 Tomorrow, Tomorrow (Sam’s hand-drawn image)

The fourth basic theme was *too polite* and *avoid confrontation*. However, it is important to note that even though frustration levels are necessary, the levels cannot be too high, otherwise some participants may disengage from the learning. Findings indicated that sometimes a few participants found the BDAL process too intense so they avoided issues that arose in the set; instead were very polite to each other:

*The group did not challenge themselves and each other enough. This was because they were too polite and only later in the process did they challenge each other’s ideas (Julian-P3).*

This is important because if the set were too polite to each other, they did not challenge or question enough. One of the reasons why the set did not challenge themselves and others enough was that they tended to avoid confrontation; instead, they bottled up their emotions as a form of defence strategy.

Action learning allows for transformation of the individual as a result of the tension that expresses and captures limits and possibilities for learning (Vince, Abbey, Langenhoven & Bell, 2017). Hence intense emotions are a necessary part of learning in BDAL; however, the ambiguity, time pressure for group

meetings, increased workloads and risk of failure (Hicks, 2002) are all elements that contribute to increasing the intensity of emotions within BDAL. It is not new to say that action learning creates tensions or contradictions (Trehan & Rigg, 2015; Vince, 2012). However, what is noteworthy is that it is important to create a safe yet unsafe environment during BDAL (Robertson & Bell, 2016) so that the groups are not too polite to each other and therefore set the stage to question the business challenge.

Action learning is designed to improve learning but it can also create anxiety, uncertainty and stress (Reynolds & Trehan, 2000). Being able to accept anxiety as a result of deviating from existing frames of reference leads to transformative change (Ajoku, 2015). This was also supported by Taylor (2000) who confirmed that fostering group ownership and individual agency within an environment of trust and safety can lead to transformative learning.

The importance of recognising emotions is reaffirmed by Mezirow (2000) and Kegan (2000), as intense emotions can create the opportunity for perspective transformation. In addition, Mezirow (2000) confirms that effective transformative learning requires emotional maturity - awareness, empathy, and control. Goleman (1995) called this emotional intelligence (EQ), where participants know and manage their emotions, motivating themselves, recognise emotions in others and deal with relationships. These intense emotions are an important component during BDAL as Mezirow (1997) suggested that if learning is too comfortable, transformative learning is unlikely.

These findings support that the participants need to experience a degree of unease but they need to let go of control and show their vulnerability so that there is more collaboration in the set. Frustration can provide a trigger for transformative learning, but participants need to manage their intense emotions. Therefore, findings on managing intense emotions support Vince, Abbey, Langenhoven and Bell's (2017) comment that there is evidence of a collective emotional context that includes interpersonal relations that impact on the BDAL process.

## 5.5 GLOBAL THEME: MULTIPLE PERSPECTIVES

This global theme was labelled “multiple perspectives” as it illustrates the way participants see the world. Hoggan (2016) describes this as a worldview where there are significant changes in the way participants comprehend the world and how it works. Worldview includes assumptions, beliefs, attitudes, expectations, ways of interpreting experience, more comprehensive or complex worldview and new awareness/new understanding (Hoggan, 2016). Seeing the world differently can improve problem solving and diverse perspectives can facilitate innovation. Perspectives are a participant’s personal point of view, which includes assumptions. This theme is similar to Mezirow’s (2000 p. 4) term ‘perspective transformation’, where the participant becomes “critically aware of one’s own tacit assumptions and expectations and those of others and assessing their relevance for making an interpretation” and Hoggan’s (2016) criterion of worldview. The global theme of *understanding multiple perspectives* included the following organising themes: *deep-rooted assumptions, open to possibilities, change in thinking* and *show respect. Being open to possibilities* and *adopting a change in thinking* are similar and are discussed together. Multiple perspectives are as a result of the BDAL experience and are hence an outcome. Outcomes are possible due to the antecedents that take place before the BDAL and the process that takes place during the BDAL. The network diagram for this section on multiple perspectives is seen in Figure 5.18.

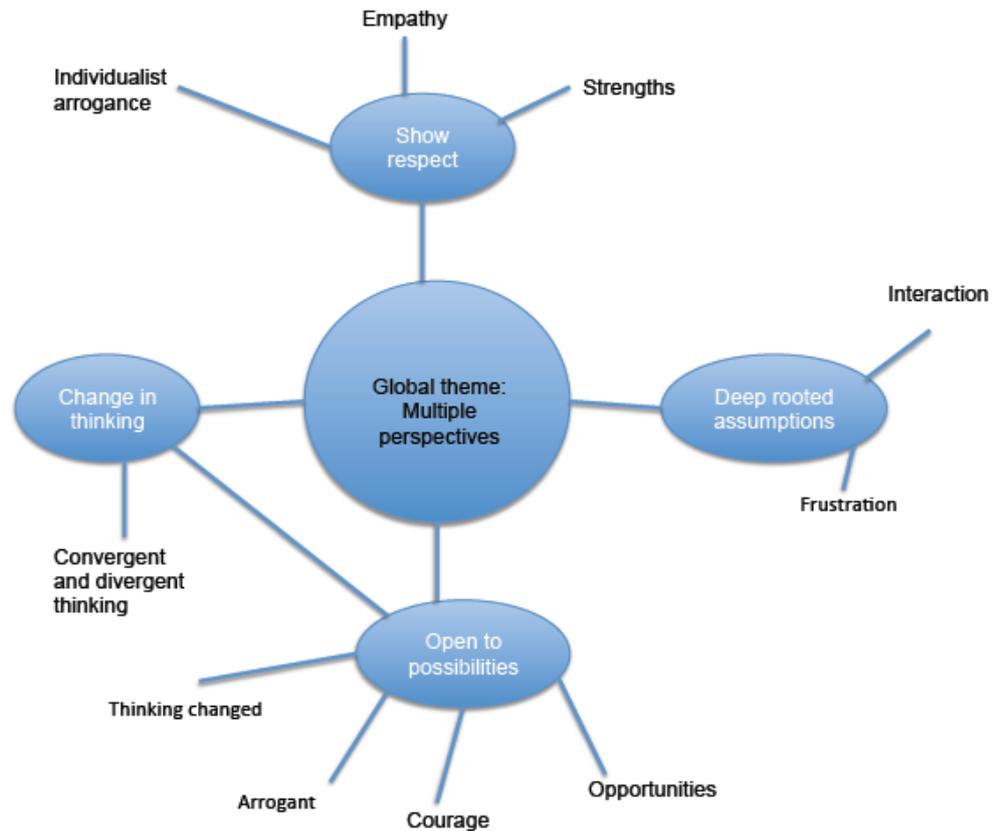


Figure 5.18 The network diagram for multiple perspectives

### 5.5.1 Organising theme: Deep-rooted assumptions

The organising theme *deep-rooted assumptions* consisted of the following basic themes: *interaction* and *frustration*. The first basic theme was *interaction*. Participants mentioned that they initially assumed that they knew what they were doing but realised that through interaction with others in their set they learnt from them. This was only possible as they were able to “*reduce their arrogance*” and “*see other people’s perspectives.*” Examples of assumptions included:

*One assumes a lot. I had a superior approach, in terms of what can you really teach me. I had an arrogant approach. That was humbling (Rhys-P3).*

*I gained multiple perspectives. I was so stuck in our way of dealing with things that, for me it was amazing. Just getting multiple perspectives (Sandy-P3).*

Transformative learning can impact assumptions that are deep-rooted in the way people think (Schein, 2004). Assumptions act as a filter for interpreting the meaning of experience (Mezirow, 2000); a good example of a filter is the

glasses that Sandy-P3 drew where she mentioned that the BDAL acted “as a *filter for viewing the world*,” see Figure 5.19. She shared her sentiments, saying that the glasses, which is the BDAL, acted as a “*perspective transformation*” and in her interpretative stories, she gave examples of where she had changed. This reaffirms that the BDAL is a vehicle that can enable a change in perspective.

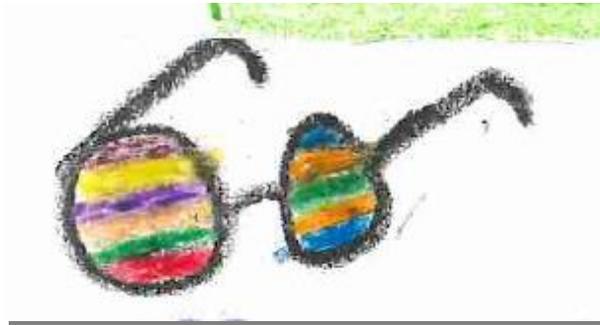


Figure 5.19 Perspectives transformation through different lenses (Sandy’s hand-drawn image)

The change in perspectives takes place when participants interacted with their set members. For example, “*BDAL helps you to understand yourself in the context of other peoples’ experiences.*” Through set interactions, participants make connections and learn about multiple points of view. The findings indicated that participants learn about themselves in the context of others, thereby supporting Mezirow’s (1997) comment that assumptions are challenged by interactions with new experiences.

The second basic theme was *frustration*. At the beginning of the BDAL journey, participants described feelings of “fear” but as they developed through the BDAL process and understood what was expected from them BDAL became “*fun*”. The findings reinforce Barden and Cashwell’s (2013) research where participants experienced frustration but as they began to recognise their own assumptions, the level of frustration decreased as there was understanding amongst set members. In order to gain multiple perspectives a certain level of frustration is necessary.

### **5.5.2 Organising theme: Open to possibilities and change in thinking**

These two organising themes *open to possibilities* and *change in thinking* were linked together. If a participant is open to possibilities it allows for a change in

thinking. These organising themes consisted of the following basic themes: *opportunities, courage, arrogant, convergent and divergent thinking*. The first basic theme was *opportunities*. Participants felt that as a result of the BDAL experience, they were open to seeing possibilities, and that they see the world differently:

*Before BDAL, I walked around with blinkers on. I walked around frustrated, judgemental and critical. I didn't stop to understand why and how. Now I see, and I watch. I see, and I watch. I kind of understand what is going on and why. My eyes are open. It is different, I see the world through different eyes. I really do (Mbali-P3).*

*A whole world has opened up, in terms of me personally as well. Not placing limitations on myself (Sandy-P3).*

Many participants concluded that due to this openness, they were able to see the opportunities back at work:

*...accepted that I should be open to different opinions if I want solutions. This has helped me in my workplace. I used to be very rigid and inflexible in terms of how I perceived things (Sam-P3).*

*BDAL has helped me see things quicker (Sally-P3).*

In brief, if participants are able to take this new flexible thinking of openness back to the work place, they were able to see solutions quicker.

The second basic theme was *courage*. Sandy-P3 drew an open door to emphasize her learning. Her hand-drawn image is represented in Figure 5.20, which indicates that a whole new world opened up for her. However, she had to find the courage to be open to the opportunities BDAL offered her.

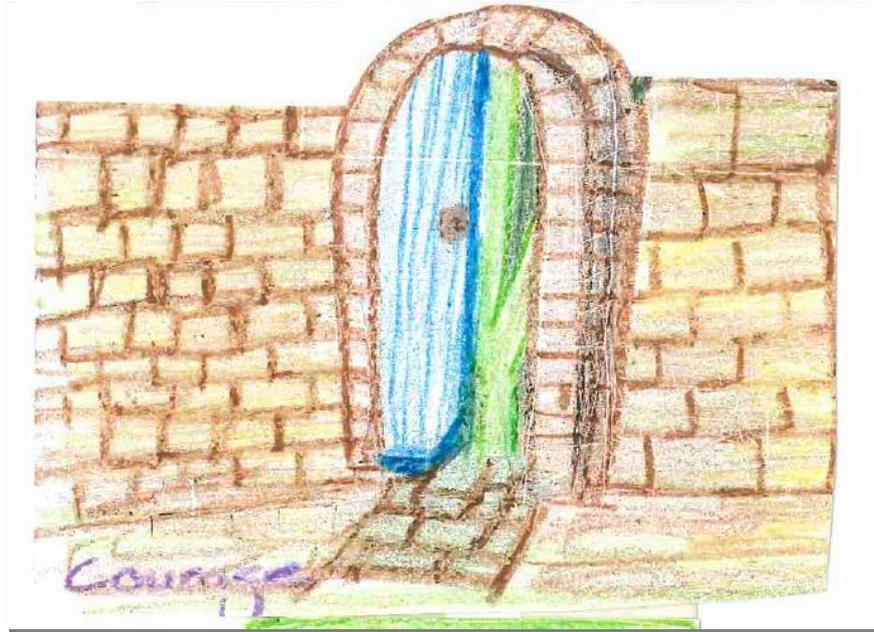


Figure 5.20 Whole word opened up for her (Sandy's hand-drawn image)

The third basic theme was *arrogant*. Some participants mentioned that they thought that they knew all the *answers* and only later did they realise that this was arrogant, for example this was illustrated in the image of Africa, seen in Figure 5.21. Rhys-P3 said that “*I had a change of perspective during BDAL.*” He drew a circle and a triangle to show the different views, which he described as a “*humbling experience.*” The words “*humbling experience*” was also used by many participants. Many participants felt that they assumed a lot and when they realised that their thinking was not open, they changed their approach by opening up to other considerations, which resulted in their worlds opening up.

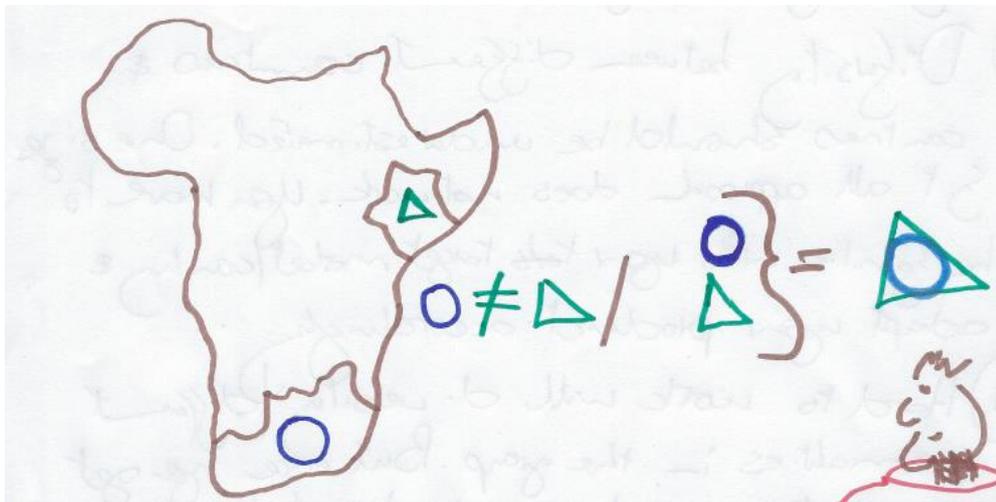


Figure 5.21 Being more open (Rhy's hand-drawn image)

The fourth basic theme was *convergent and divergent thinking*. The concept of converging and diverging thinking styles was mentioned by most participants as they indicated that they learnt how to move between the detail and seeing the big picture:

*Take a minute to look up and see where else I could have helped, rather than focus on one thing. I would then have picked up that there was something else I was missing. I was so engrossed at that point in time that I did not see the bigger picture (Louie-P3).*

*Opportunities, in the sense of what is available out there, and a broader look in terms of what is happening, from a work point of view. You look at it from a wider point of view and the impact it has on the company and the client and add to that, converging and diverging. We tend to focus on specific detail but need to go out and look at the wider picture (Rhys-P3).*

Luke-P3 drew a metaphor of not being able to see the wood for the trees, as illustrated in Figure 5.22. He mentioned that he is analytical and needs to take a high level view as well.

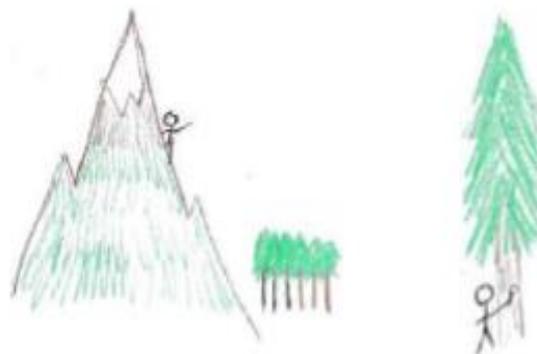


Figure 5.22 Wood for the trees (Luke's hand-drawn image)

Participants recalled applying converging and diverging thinking as being confusing yet beneficial for understanding. Participants recognised that one of the thinking styles, either convergent or divergent, was natural for them, but they had to then learn how to apply the other style:

*We need to diverge and converge to understand. I had to learn a different way of thinking. I had to learn the diverging. I do not take steps back, trying to understand the bigger picture, trying to see what the next five steps are going to be. This was actually the difficult part. So that was, in itself, the biggest 'aha moment' (Prisha-P3).*

*Converging and diverging was very difficult for me, as I tend to be very detail orientated. I am an analytical type of person but forcing myself to take a high-level view is necessary. By zooming out like that I was able to restructure what we had to make a bit more sense of and that was difficult for me, it was quite difficult, but I see the value in doing it now. That is why doing the BDAL in a team is so important as I am an analytical person and I am going to have one way of doing things and another person will look at the big picture. Having those two viewpoints is very important (Luke-P3).*

Many participants mentioned that through the experience of convergent and divergent thinking it lead to an *aha* moment. For example: *“You stand and look at the picture and then you go into the detail. The ability of zooming in, zooming out, looking at all perspectives. Then suddenly you have an ‘aha moment’. It will just grab you.”* In addition many participants illustrated converging and diverging in their pictures. Prisha’s-P3 hand-drawn image, Figure 5.23, indicated that she found that through converging and diverging an ‘aha’ moment was created.

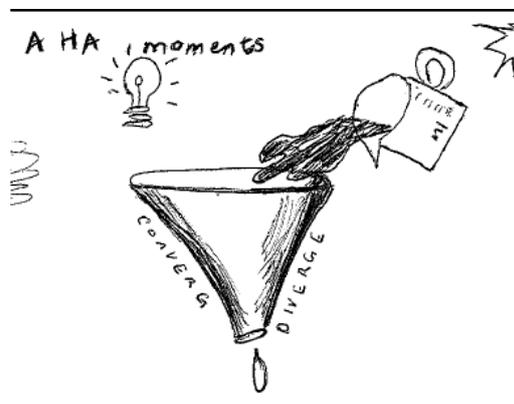


Figure 5.23 Diverge and converge (Prisha’s hand-drawn image)

Action learning starts by diverging through the use of questions and only then is the thinking narrowed by converging (Inglis, 1994). The set members need to see the entire problem before they can start to work on the details and this is only achieved through questioning and then reflecting (Dilworth & Willis, 2003). In summary, participants move in and out of convergent and divergent thinking, enabling flexible thinking.

### 5.5.3 Organising theme: Show respect

This organising theme *show respect* included the following basic themes: *individualistic arrogance*, *strengths* and *empathy*. The first basic-need was *individualistic arrogance*. The majority of participants agreed that they learned

to understand multiple perspectives when there was a high level of respect for one other:

*Everyone needs to respect each other. There were five strangers in the group and you can't do this without at least understanding each other, to an extent (Fatima-P3).*

*You come to realise that when you move past the conflict and concerns, each one brings so much to the table, and once you know you can really tap into the different aspects each person brings, you are a formidable team (Rhys-P3).*

When participants respected one another, they started to see the world through other's perspectives. Many participants felt that once set members could see another participant's perspective, it enhanced their understanding of the situation and one another. One of the participants suggested that she put her own needs before those of the group and called this 'individualist arrogance: "*Maybe I was over self-assured, or it was individualistic arrogance, as I didn't need anyone to validate my thinking or anyone to broaden my concept.*" Therefore, showing lack of respect towards others. However, findings indicated that participants were aware of this behaviour when they reflected on the BDAL experience. In contrast, there were participants who did consider the needs of the group before their own needs:

*I felt that the one person was not engaged and contributing enough. I realised how my need to fill my ego to talk and dominate was driving out her right to speak. I snuffed out her right to speak. That was huge. A big ego moment. Because of my need to dominate I am contributing to the dynamic of imbalance. I needed to keep quiet. I needed to step back and let her come to the fore and that is what I did (Mbali-P3).*

*I definitely became more group focused versus individually focused (Charmaine-P3).*

When participants place the needs of the group before their own needs, they start to understand multiple perspectives as they see the world through a lens of appreciation rather than judgement. Mbali-P3 used the term "*appreciation rather than judgement*" in her story and it aptly describes the respect in a relationship. Belenky, Clinchy, Goldberger and Tarule (1986) called this *connected knowing*, where the participants suspend their own opinion to understand others, which results in gaining a deep perspective. What is noteworthy in this present study is that the connected knowing took place as a result of the respect in the set interaction, which precluded judgement.

The second basic theme was *strengths*. Most participants agreed that as a result of understanding others' perspectives, it enabled them to see the strengths within the set:

*I realised that diverse viewpoints are important, and I realised in the BDAL that people are not the same as me. I needed to be able to deal with them and them not being the same as me is a strength (Luke-P3).*

*Initially I was so frustrated by it, and then I realised, but hang on, see how you can make this work, bring out each other's strengths (Mbali-P3).*

The third basic theme was *empathy*. Consequently, the strengths fostered social unity and the set members became aware of the benefits of diversity as participants respected the differences. Action learning benefits from the diversity of the set members (Yeo & Gold, 2011). Many of the participants concluded that once they understood others' perspectives, they started to show empathy for their set members:

*All of us were from different walks of life. It is about truly understanding where the other person is coming from and why the person is asking the question. That person asking the question raised a new question, you see things differently. You see things differently from that person's perspective. A questioning mind. I want to think that different perspectives have taught me patience. I have a new higher tolerance level of other individuals and I'm really more patient (Prisha-P3).*

*Initially, you have an impression of each person in the group, but as time passes you realise that their different personalities, perspectives and life experiences are actually gold to the group. As these people all have their own dynamics and perspectives to bring into the BDAL, you can learn a lot from them if you just give them a chance and hear them out (Logan-P3).*

The importance of showing respect through showing appreciation and reducing individualist arrogance is noteworthy in this present study as it contributes to the knowledge on transformative learning within BDAL. The theme of *multiple perspectives* makes a valuable contribution to knowledge in this present study. This is because those participants who are aware of their own assumptions and made adjustments when necessary were able to understand their set members' perspectives. This was seen in Mbali's story where she was able to see her line manager's perspective. They are, thus, less judgmental and open to different world views which is an indication of transformative learning.

The process of transformative learning may differ according to those involved; however, the outcome of transformative learning aims to give participants a

permeable worldview (Mezirow, 1991). In this alteration of perspective, in the transformation of meaning, lies transformation (Cranton, 1994; Elias, 1997; Kremer, 1997; Mezirow, 1978; 1991).

In summary, when participants were able to show appreciation and empathy for their set member, they demonstrated respect and recognised the strengths of the team members. Most participants became aware of their own deep-rooted assumptions in the context of learning about others' assumptions and this reduced the level of frustration in the set. The BDAL experience enabled participants to become more open and change their thinking so that they could see possibilities.

## **5.6 GLOBAL THEME: SELF-AWARENESS AND CONFIDENCE**

This global theme is “self-awareness and confidence.” Self-awareness is the participant’s conscious understanding of strengths, weaknesses, thoughts and feelings, which resulted in improved self-confidence. Revans (1982) concluded that action learning includes a focus on the self as the participants create self-awareness via the questioning of assumptions by examining oneself and pursuing personal change. One of the outcomes of Hoggan’s (2016) transformative learning is self, which entails a significant shift in the sense of self. Hoggan (2016) summarises this as self-in relation, empowerment/responsibility, identify/view of self, self-knowledge, personal narratives, meaning/purpose and personality change. This global theme included the following organising themes: different person and search for purpose. The network diagram for this section on self-awareness and confidence is presented as Figure 5.24.

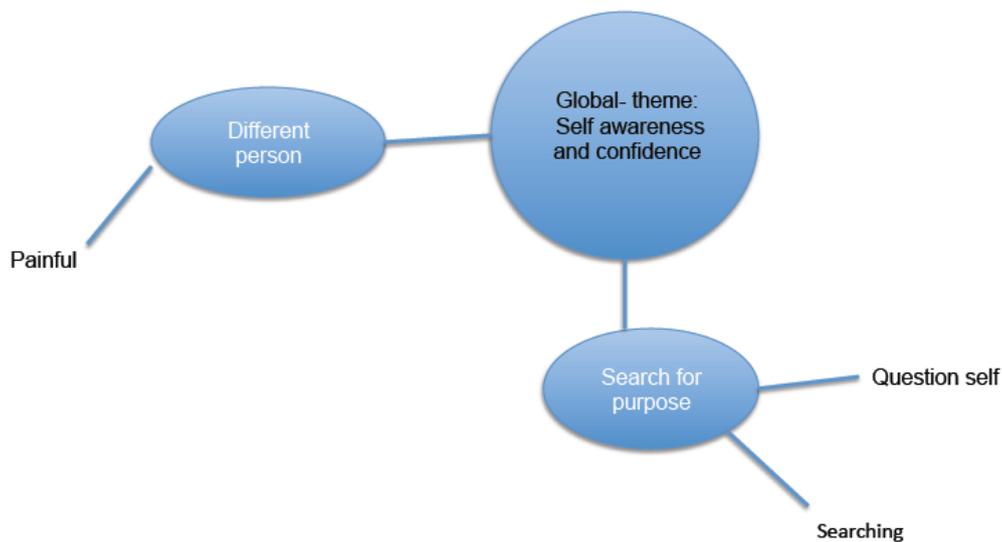


Figure 5.24 The network diagram for gained self-awareness and confidence

The process of learning in action learning embodies openness to the world and when this takes place, it has the potential to transform sense of self (Dirkx, Mezirow & Cranton, 2006). One of the reasons for applying BDAL is to create self-awareness (Boshyk, 2014). Many participants mentioned that they are more self-aware:

*It's about being more self-aware. In terms of self-awareness, that was my biggest take away (Fatima-P3).*

*I have a better sense of self, a better sense of self-esteem. It was due to harnessing a lot of self-awareness and my own issues (Mbali-P3).*

Mostly, participants realised that this understanding of self took place within the context of the team setting:

*This journey is about yourself, even though it is an organisational BDAL (Louie-P3).*

*BDAL is an opportunity where you learn to understand your experiences in the context of other peoples' experiences (Mark-P3).*

This present study supports the view that action learning is known for its success in the growth of individuals (Kuhn & Marsick 2005; Rolland 2006). The theme of self-awareness reflects the participants' positive shift in their sense of self and supports Ruane's (2016) finding that action learning leads to more self-awareness. These findings support the view that the outcome of transformative learning is a new and exciting understanding of the self (Newman, 2014).

Most participants realised that the obstacle to learning was in fact themselves – one participant mentioned “*the barrier was me.*” Through a sense of unease participants were able to understand themselves better, even though the process of understanding self is not always comfortable:

*Not all the feedback I received was positive (Sandy-P3).*

*It was a humbling experience (Rhys-P3).*

Figure 5.25 is an illustration which Prisha-P3 drew to emphasise her unease and confusion during BDAL and that this led to understanding the self: “*I drew a man being pulled in all directions and being very confused. But it is about understanding. I also need to understand myself and my tolerance level.*”

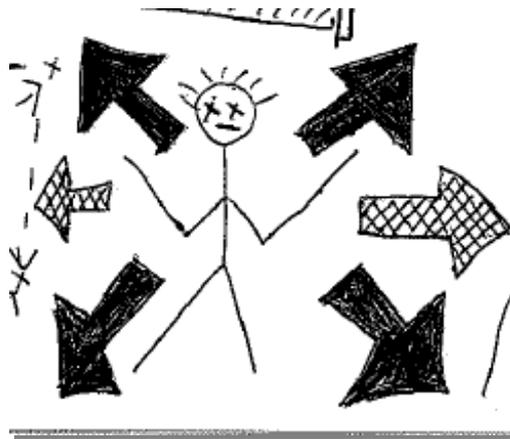


Figure 5.25 Man being pulled in all directions (Prisha’s hand-drawn image)

The findings from the stories indicate a deepened understanding of the self, which resulted from a painful experience. These findings support Cranton (2006) who confirmed that a disorienting dilemma enabled a participant to reconsider their self-concept. These findings support Mezirow (1985, p. 24) and Schein’s (2004) point when they concluded that transformation can be “epochal ... [and] ... painful” as it involves a comprehensive and critical re-evaluation of oneself. Consequently, if the drive in BDAL is to create self-awareness with an aim to ensure transformative learning, then the participants need to experience unease.

Self-confidence is the opposite of doubt. It is about believing in oneself (Bénabou & Tirole, 2002). It is the participant’s expectations of their performance and self-evaluations of their abilities (Lenney, 1977). Many

participants mentioned that they did not initially believe in themselves and their abilities:

*I didn't have a high level of confidence but once you go through this process you do (Odwa-P3).*

*I have low self-confidence and low self-esteem. I desperately want to be better and during this process, I became the person I wanted to be (Mbali-P3).*

These findings support Johansson and Lindhult's (2008) research that active action learning sets enhanced self-awareness and improve self-confidence. As participants became entrenched in BDAL and improved their skills, their self-awareness improved, their capabilities improved and hence their self-confidence grew. Most participants reported that they learnt specific skills while working with the set. Through mastery of skills, the participant's confidence in themselves grew, and they were then able to change their behaviour. Many participants mentioned that they have gained new skills such as meeting, planning and project management. These skills are not related to transformative learning but can be seen as outcomes of BDAL.

Amongst other participants, Rhys-P3 and Odwa-P3, mentioned that they gained planning and project management skills, which were a result of working directly on the BDAL project. As participants grew their skills, their capabilities showed and they doubted themselves less. For example: *"I doubted myself upfront but as I went through the process my capabilities showed."* This indicated that skills development and improved ability could increase confidence levels.

Most participants mentioned that since the BDAL experience, they are more self-confident and able to display this behaviour back at the workplace:

*I think that I have also grown since the BDAL in that I am much more inclined to speak to somebody about something that I am unhappy about (Luke-P3).*

*I got my confidence up. I don't second guess myself. I make a decision and I'm very clear about it. Even to the other managers, the one girl said she wished she had my confidence (Sally-P3).*

As participants affirmed that they show more self-confidence back at work, this is an indication that they have changed their behaviour. Self-awareness can encourage participants to take opportunities that are offered in the workplace. This shows that the skills learnt during BDAL have an impact on the participant

and in fact, can contribute towards transformative learning. This finding supports Ruane's (2016) finding that action learning leads to greater self-confidence.

### 5.6.1 Organising theme: Different person

This organising theme of a *different person* included the following basic theme: painful. Some participants mentioned that they are now different people since the experience however it was painful: *"it was exhausting but soul altering and I would do it again in a heartbeat."* To emphasize that she is a different person, Mbali-P3 drew the metamorphosis from a caterpillar to a butterfly, see Figure 5.26.

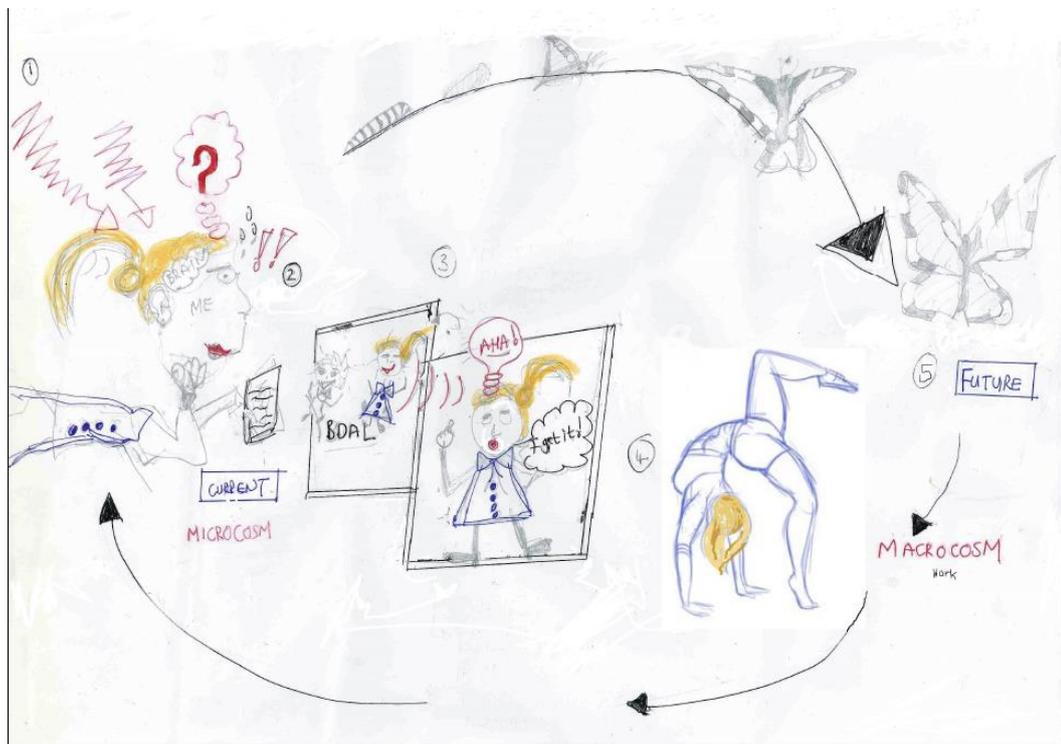


Figure 5.26 A different me (same as Figure 4.2)

What is noteworthy is that the findings indicate that some participants see themselves as being different people since working on BDAL.

### 5.6.2 Organising theme: Search for purpose

The organising theme of *search for purpose* included the following basic themes: *questions self and searching*. "Purpose is an intention over the long-term to have an effect on the world that is both meaningful to oneself and to others" (Heng, Blau, Fulmer, Bi & Pereira, 2017, p. 308). As each participant is

an individual, their purpose will differ. What is important is not the meaning of life in general but rather the specific meaning of a participant's life at a given moment (Frankl, 1984).

The first basic theme was *question self*. Findings here indicate that since working on a BDAL project, many participants are asking more questions about themselves, searching and trying to identify what their purpose is:

*One of the things that I have tried to identify is my purpose. I am asking – why am I in this job, why am I with this company and what value am I providing to our company as a team. What value am I providing to the company as a person in my individual role, how can I get better and how can I help my manager make the entire department better? (Luke-P3).*

*I am in a place of searching who I am and what my purpose is. I know I will find the answers. This has been a big change for me (Louie-P3).*

Odwa-P3 started off the interview explaining her hand-drawn image. Her drawing included “My Purpose,” see Figure 5.27. She explained this as: “For me everything is about, what is my purpose? What is it that I’m here for? Before the BDAL if you had asked me, I might have said my purpose is support. Everybody in my life and in work. I’m an enabler. But now, it’s changed a bit. It is no longer just the support but also to discover myself and to build on that. To build confidence, to build knowledge, to build growth” (Odwa-P3).



Figure 5.27 Purpose (Odwa's hand-drawn image)

The second basic theme was *searching*. A seemingly unique finding from this present study is that some participants mentioned that since the BDAL experience they feel more confident which has resulted in them searching for their meaning or purpose in life. The concept of searching implies that learning does not end after the BDAL experience. The literature supports longevity in the learning and the concept of life-long learning. In the findings, participants experience moments of insights during the BDAL experience and making

meaning during moments of insight becomes “an intense desire to discover the unique meaning and purpose to one’s life” (Joshi, Marszalek, Berkel & Hinshaw, 2013, pp. 228-229). The findings indicated that BDAL helped participants to start searching for their purpose.

Through the BDAL process, participants came to realise what they know and what they can achieve and recognised that they have the potential to articulate their purpose for themselves. Damon (2008) proposes that only when participants find personal meaning do they apply effort into their learning. He proposes that a life purpose creates an intention that gives meaning and advocates that for most participants the discovery of purpose may not happen on its own. As indicated in these findings, the BDAL could encourage a desire in participants to search for their purpose.

In summary, the BDAL experience has enabled self-awareness and confidence. Mostly, participants have left the BDAL experience with a need to define their purpose, and they are asking themselves: *what next?*

### **5.7 SYSTEMATIC MAP OF KEY FINDINGS PHASE THREE**

The findings from Phase Three that were written up in Chapter Five and the feedback from the action learning coaches in Phase Five were applied to the design of the systematic map of key findings, Figure 5.28.

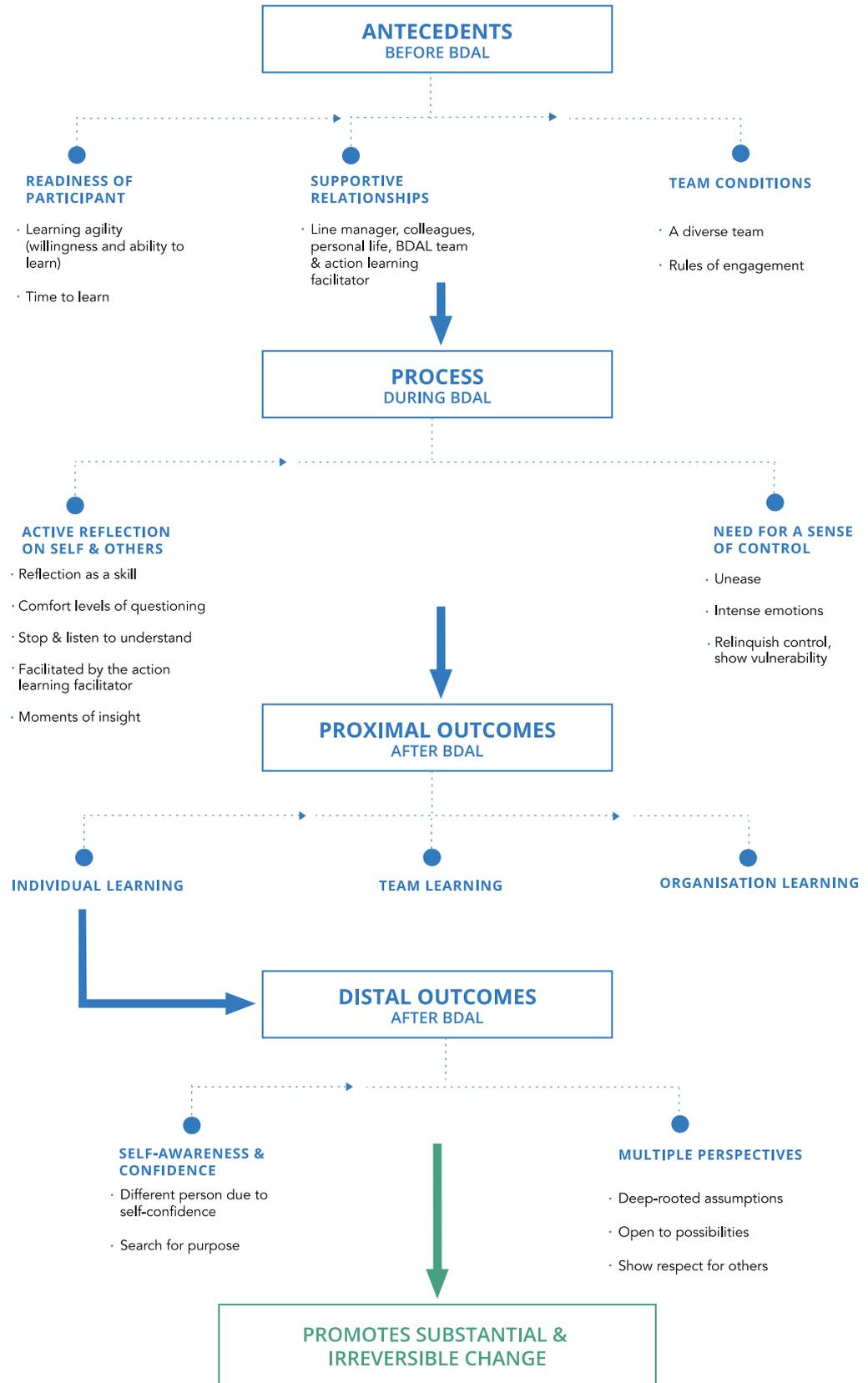


Figure 5.28. Systematic map illustrating key findings from thematic analysis

This graphical illustration of a systematic map was designed as a systems approach so that the interdependencies of the global themes and predominant organising themes from Chapter Five are summarised. Each global theme was given a place in the learning path, which included preconditions/antecedents inputs (before BDAL), process (during BDAL) and outputs (after BDAL). The preconditions towards transformative learning are seen as antecedents and include the following organising themes: readiness of the participant, supportive relationships and team conditions. The process included the following global themes: active reflection on self and others and need for a sense of control. The distal outcomes that take place are a result of the BDAL experience and included the following global themes: self-awareness and confidence and multiple perspectives. In this present study the gap was the lack of understanding regarding individual learning outcomes in the form of individual transformative learning during BDAL that required further research. Team and organisational learning was not explored in detail in this present study and are therefore not included in the systematic map.

At the suggestion of the action learning coaches in Phase Five data it is important to recognise that since participants work in the context of open systems, there is always uncertainty, which means that in addition to proximal and distal outcomes, opportunities for learning emerge in unexpected ways so there is the potential for additional outcomes to emerge and these can be called “emergent outcomes,” an example is networking amongst colleagues. However, emergent outcomes were not part of this present study. The systematic map is a summary of the findings. The global theme of preconditions towards a transformative learning environment and the organising themes of readiness of the participant, supportive relationships and team conditions contribute towards creating a transformative learning environment in a BDAL context. Readiness of the participant includes learning ability and time to learn. Supportive relationships from line managers, colleagues, family, the BDAL team and the action learning coach also assist in this regard. Team conditions involve a diverse team and clear rules of engagement. The process during BDAL included the global themes of active reflection on self and others as well as a need for a sense of control. Active reflection on self and others is facilitated by

the action learning coach. Reflection takes place when participants stop and listen to understand and by so doing create the opportunity for a moment of insight to take place. However reflection is a new skill for many participants and they need to become comfortable with the levels of questioning that take place during BDAL. Participants have a need for a sense of control during BDAL as the process can result in unease due to the amount of questioning and the unfamiliarity of the BDAL learning process. Participants often experience intense emotions during the BDAL process and if they are able to relinquish control and show their vulnerability it reduces the amount of frustration in the learning process. The distal outcomes take place after a BDAL experience - there can be many experiences during BDAL so the distal outcomes can take place during a set meeting, during a meeting with a stakeholder, during a meeting with the action learning facilitator all of which can be reflected upon and has the potential to create a moment of insight. In addition transformative learning after BDAL can take place once Hoggan's (2016) criteria of breadth, depth and relative stability has taken place. The distal outcomes from this present study include the following transformative learning outcomes: multiple perspectives, self-awareness and confidence. Self-awareness is a result of the learning process and through self-awareness the participants start to feel more confident about their abilities and this allows for them to become a different person. Searching for purpose can take place, thus emphasising the learning is continual. Through the BDAL experience participants gain multiple perspectives as they become more open to possibilities and as their deep-rooted assumptions are challenged through BDAL. This can only take place if they show respect for others. Together the antecedents, process and proximal and distal outcomes promote a substantial and irreversible change, transformative individual learning.

In summary, the aspects in the systematic map typify holism, as the whole is larger than the sum of the parts (Ackoff, 1974). Haines (1998) offers that within a system, individual components, such as antecedents and processes, work together to uphold the whole system. It is not the constructs of the parts themselves (Ackoff, 2004) that create transformative learning, but the sum of the parts that promotes transformative learning. Therefore, the systematic map

is a configuration that embodies aspects in a system, where there is an input, process and output. In conclusion this systematic map summarises the findings using global themes and some organising themes from this present study that can be applied to the new conceptual framework in Chapter Six.

## **5.8 FEEDBACK FROM PARTICIPANTS ON THE SIMILARITIES AND DIFFERENCES IN THE BDAL EXPERIENCE**

Participants in Phase Four compared their BDAL experience to the experiences described in the interpretive stories. Mostly participants in Phase Four found that there were many similarities between their experience and the interpretive stories. In Phase Four, eight out of nine participants mentioned that they did have an 'aha' moment.

The global themes identified in the emails from participants in Phase Four included multiple perspectives and self-awareness, which are part of Hoggan's (2016) typology of transformative learning outcomes. However, it was also necessary to check that these two outcomes met the criteria of breadth, depth and relative stability for the learning to be transformative (Hoggan, 2016). In Phase Four seven out of nine participants concluded that their level of learning was 3<sup>rd</sup> level and the other two participants choose 2<sup>nd</sup> level using Sterling's (2010-2011) model for depth in learning.

Participants used the words "*similar experiences,*" "*I see many aspects of what the others have said within their stories that align with my experiences,*" "*I found a great amount of similarities*" and "*mostly reminded me of my experiences.*" The analysis of data from Phase Four did not identify any additional themes and all themes that were noted related to the themes that were identified from Phase Three. In summary Phase Four data analysis produced a richer understanding of participants' experiences during BDAL and supported the global themes from Phase Three.

## 5.9 FEEDBACK FROM ACTION LEARNING FACILITATORS ON THE NEW CONCEPTUAL FRAMEWORK AND PARTICIPANTS ON THE USE OF STORIES

Two types of feedback was gathered in Phase Five data gathering and analysis: feedback from action learning facilitators on the new conceptual framework (TBDAL) and feedback on the use of stories as a learning tool.

### Feedback from action learning facilitators on the new conceptual framework (TBDAL).

Feedback on the application of the conceptual framework in facilitating individual transformative learning was gathered from action learning facilitators and summarised in Table 5.1. The action learning facilitators did not provide any significant changes to the conceptual framework. In addition action learning facilitators agreed that the conceptual framework contributes to the practice of BDAL in a management development context.

Table 5.1. Feedback from the action learning facilitators on the new conceptual framework.

Action learning facilitator	Direct quotes sent via email
Facilitator One	Very comprehensive framework that I can apply in my role. Is the facilitator not also a stakeholder in supportive relationships?
Facilitator Two	Buy-in from the organisation is key pre-condition; as long as they see the value in it, they will support it - they use the BDAL projects to resolve burning issues- and that should be aligned to organisation strategy. I think the participants would be a lot more motivated if they have to motivate why they should be elected to participate in the programme, as opposed to having to attend yet another training session. If the process is reversed and they have to write a motivation letter, go through a process of being interviewed and when the organisation supports and provides recognition, it makes a huge difference.
Facilitator Three	In terms of antecedents distinguish between readiness and willingness - someone might be very keen (willing) to do the programme but might not be ready for it.
Facilitator Four	The findings are clearly articulated, with coherent links to theoretical frameworks. The recommendations are pragmatic and sensible.
Facilitator Five	Well done – I think a lot of thought and reflection has gone into this and you have considered many of the issues that impact individual transformative learning.

Action learning facilitator	Direct quotes sent via email
Facilitator Six	Thank you so much for the privilege of reviewing what is obviously extensive research around the BDAL and its enablement of individual transformative learning. This is a very exciting piece of research. Fight, Flight or Freeze usually results when participants are taken out of their comfort zone and their thinking has not developed sufficiently to enable them to embrace disruption as a key lever to transform their thinking. You have plotted the BDAL design and implementation process really well. Would organisation stakeholders also need to be developed in the use of vulnerability etc. to be able to support your process?

### Feedback on the use of stories as a learning tool

The participants concluded that they felt that they could relate to the experiences in the interpretive story as the interpretive story helped them deal with their own circumstances and alleviated their fears around BDAL.

Most participants verified that they could relate to the story as is illustrated by this quote:

*As I could identify with the character of the participant and the learnings, it really hit home. The narrative is brilliant, as it has put into words so much of what my thoughts have been about the programme (Participant 1-P5).*

In addition, Sandy's story gave them hope to handle their own circumstances, which was demonstrated in the following response:

*It has the helping hand I needed and gave me a sense of hope and relief. I also became excited as I was curious to get to the end and find out in which way this would have changed me as well just like in the story, I wanted to know what my ending would be (Participant 2-P5).*

Overall Sandy's interpretative story normalised the situation for participants and allowed them to see the potential offered by the BDAL and not only the challenges (Robertson, Le Sueur & Terblanche, 2018). The stories were thus an aiding tool for learning, thereby confirming Branch and Anderson's (1999) view that stories can engage students' reflective thinking, writing and learning activities. The benefit of using interpretive stories as a learning tool is that it could help create an understanding about the process that takes place during BDAL, thus alleviating some of the anxiety around BDAL.

## 5.10 SUMMARY OF THE CHAPTER

This chapter offers an interpretation and discussion of the findings from the interpretive stories in Phase Three. The findings identified five global themes: preconditions that create an environment for transformative learning, active reflection on self and others, sense of control, multiple perspectives and self-awareness and confidence, all of which add insight into current notions of transformational learning theory within a BDAL environment and contribute towards articulating the final conceptual framework and conceptual guidelines in Chapter Six.

The first research sub-question on the extent of transformative learning was addressed in Chapter four. Once the extent of transformative learning was established it enabled the other sub-research questions to be addressed in this chapter. The second research-sub question identified the preconditions that created an environment for transformative learning. These conditions were addressed in detail via the organising themes, which provide granular aspects to the global theme, preconditions for transformative learning. The organising themes that need to take place before BDAL starts included readiness of the participant, supportive relationships and team conditions. These organising themes lay the foundation for the BDAL to take place and are key to the possibility of transformative learning taking place.

The third research sub-question clarified what aided transformative learning during the BDAL process. The findings identified two key process: active reflection on self and others and need for a sense of control. The first key process was active reflection during BDAL can be an uncomfortable process for many participants as well as being a new skill. The role of the action learning coach, a key stakeholder, is important in creating an environment enabling active reflection to take place. However, the participant, also a key stakeholder, needs to stop, listen to understand others during reflection to create the opportunity for moments of insight to take place. The other key process was the participant's need for a sense of control. It is of particular importance to recognise that working in a group of peers and constantly questioning can create discomfort for participants and that they struggle with this unease and hence their need for a sense of control. The paradox is that participants need

this tension in order to learn, but they constantly strive for a sense of control. The participants themselves needed to relinquish control and show vulnerability to reduce the intense emotions.

The transformative learning outcomes that resulted from the findings include multiple perspectives, being self-aware and confidence, which address research sub-question (Q3) What outcomes resulted from the BDAL experience? The findings are summarised in a systematic map that contributes to the new conceptual framework in Chapter Six.

The aim of Phase Four and Five was to add to crystallisation by including different perspectives into the research. Feedback from participants in Phase Four on the similarities and differences in their BDAL experience was that their experience was similar to the participants in Phase Three. Feedback from the action learning coaches in Phase Five on the new conceptual framework aided in the development of new conceptual framework by confirming that the conceptual framework could be applied to practice. In addition feedback on the application of an interpretive story to aid participants in the BDAL experience was given by participants who had just started their BDAL project and this forms one of the suggestions in the conceptual guidelines in Chapter Six.

## **CHAPTER SIX: SUMMARY AND CONCLUSIONS: NEW CONCEPTUAL FRAMEWORK AND CONCEPTUAL GUIDELINES**

### **6.1 INTRODUCTION**

This final chapter summarises this present study by presenting a new conceptual framework Transformative Business-Driven Action Learning (TBDAL). The TBDAL conceptual framework incorporates Boshyk's (2014) component parts framework distilled from Chapter Five. The TBDAL framework responds to the main research question: How should a BDAL framework be designed to facilitate individual transformative learning during a management development programme?. Thereafter this chapter provides conceptual guidelines for the four key stakeholders for using the new framework which is important if the new framework is to be implemented. The conceptual guidelines answer the sub-research (Q4): What conceptual guidelines can be recommended for the four key stakeholders: the sponsoring organisation, the learning institution, the participant and the action learning facilitator to aid individual transformative learning in BDAL?

Most importantly the scholarly contributions, contributions to practice and methodological contributions are summarised, as well as a reflection piece from the researcher. The chapter concludes with limitations to this present study and further research suggestions.

### **6.2 BOSHYK'S COMPONENT PARTS FRAMEWORK**

This section is a summary discussion on individual transformative learning in BDAL and Boshyk's BDAL component parts framework. There are various forms of action learning, including BDAL, that are applied to management development programmes which aim to ensure learning (Sandager, et al., 2019). In BDAL, the learning is described as individual, team and organisational learning (Boshyk, 2010). In practice, individual learning during BDAL is often sacrificed as participants focus mainly on completing the task of solving the business challenge (Raelin & Raelin, 2006; Svalgaard, 2016). Sandager, et al. (2019) posit that it is important to focus on both the task and what happens in the moment to aid learning. In terms of individual learning, the literature emphasizes that managers cannot achieve performance in the changing

organisational environment if they are stuck in the patterns of their previous experiences (Shelton & Darling, 2003).

A concern in management development literature is that individual transformative learning is often not included into the design of a management development programme as it is seen as a by-product of the programme (Taylor & Laros, 2014). This present study answers the call from Ajoku (2015) who expressed that there is scope to explore the boundaries between action learning and transformative learning.

BDAL is part of the Scientific school of action learning, and it is this approach that separates BDAL from other types of action learning. The Scientific school applies Revans' method for achieving managerial effectiveness called the 'Alpha, Beta and Gamma Systems' (O'Neil & Marsick, 2007). 'Alpha system' (analysis of external environment, internal resources and the managerial value system), 'Beta system' (planning, action, reflection and learning) and 'Gamma system' (the learning process, as felt by each participant, which includes self-questioning and awareness of self and others) (O'Neil & Marsick, 2007). To aid in the application of the Alpha, Beta and Gamma systems, Boshyk's (2014) theory includes component parts and it is these component parts that differentiate BDAL from other forms of action learning. The details of these component parts were included in the literature review but can be summarised as: top executive ownership, challenges, knowledge capture and sharing, company-wide sharing and collaboration with stakeholders, teamwork, outside-in and external perspectives, individual development and recommendations on business challenge. Figure 6.1 represents an illustration of Boshyk's (2014) component parts in an adapted framework. These component parts were not researched, however additional component parts were researched in the facilitation of individual transformative learning into BDAL. The researcher has adapted Boshyk's (2014) framework to include antecedents, process and proximal outcomes using Cho and Egan's (2009) framework as an example. Boshyk (2014) in his original framework, placed all the component parts in a circle, however due to the systemic nature of action learning the researcher is of the opinion that antecedents, processes and outcomes are suited to the implementation of BDAL, but this does not mean that the framework is linear.

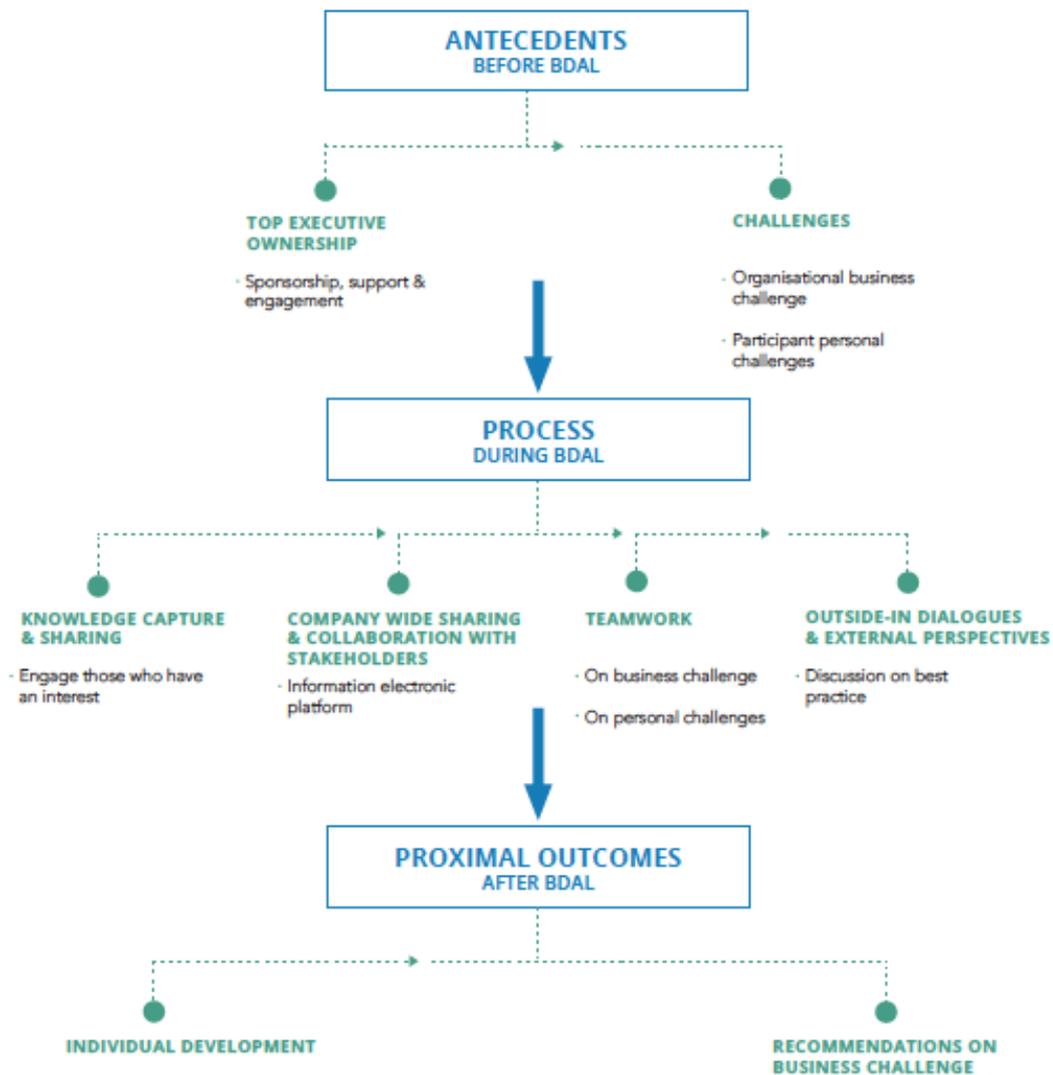


Figure 6.1 Components parts of BDAL - adapted from Boshyk (2014) see Figure 2.4.

From Figure 6.1, it can be seen that Boshyk's (2010) component parts can be broken down into three sections to emphasise system thinking in BDAL. The first section includes the antecedents, which take place before BDAL starts. In antecedents, the first component is top executive ownership in the form of a business sponsor who owns the identified business challenge but is not part of the team. The second component includes challenges. The team works on a real life business challenge and personal challenges.

The second section includes the process during BDAL. As part of the BDAL

processes, the third component is knowledge capturing and sharing via a common information technology platform, thereby giving all set members access to the data collected on the business challenge. Company-wide sharing and collaboration with stakeholders is the fourth component, as participants collect data via collaborating with the business. Teamwork is the fifth component and entails regular set meetings. The sixth component is outside-in dialogue with all external stakeholders who have a similar business challenge to stimulate reflection on the business challenge, explore best practice and benchmarking. Together, all component parts contribute to proximal outcomes that include individual development and recommendations on the business challenge (Boshyk, 2014). The literature on BDAL component parts requires further understanding on what constitutes individual development, specifically, individual transformative learning.

### **6.3 NEW CONCEPTUAL FRAMEWORK: TBDAL**

The new conceptual framework proposed in this present study, Transformative Business-Driven Action Learning (TBDAL), contributes to Boshyk's (2010) component parts by adding additional components. TBDAL is, therefore, an extension of Boshyk's (2010) component parts and the findings resulting from this present study. A visual representation of TBDAL is seen in Figure 6.2 where the combination of the research findings (global and some organising themes) are integrated into Boshyk's (2014) component parts. Boshyk's (2014) component parts are illustrated in green, and the additional components from this present study are illustrated in blue. To achieve facilitation of individual transformative learning, the following sections are included in the framework: antecedents (before BDAL), process (during BDAL), and proximal and distal outcomes (after BDAL). In TBDAL, all aspects need to work together before, during and after BDAL as a systems approach is necessary to promote individual transformative learning. If a component is missing it may impact upon individual transformative learning as a distal outcome.

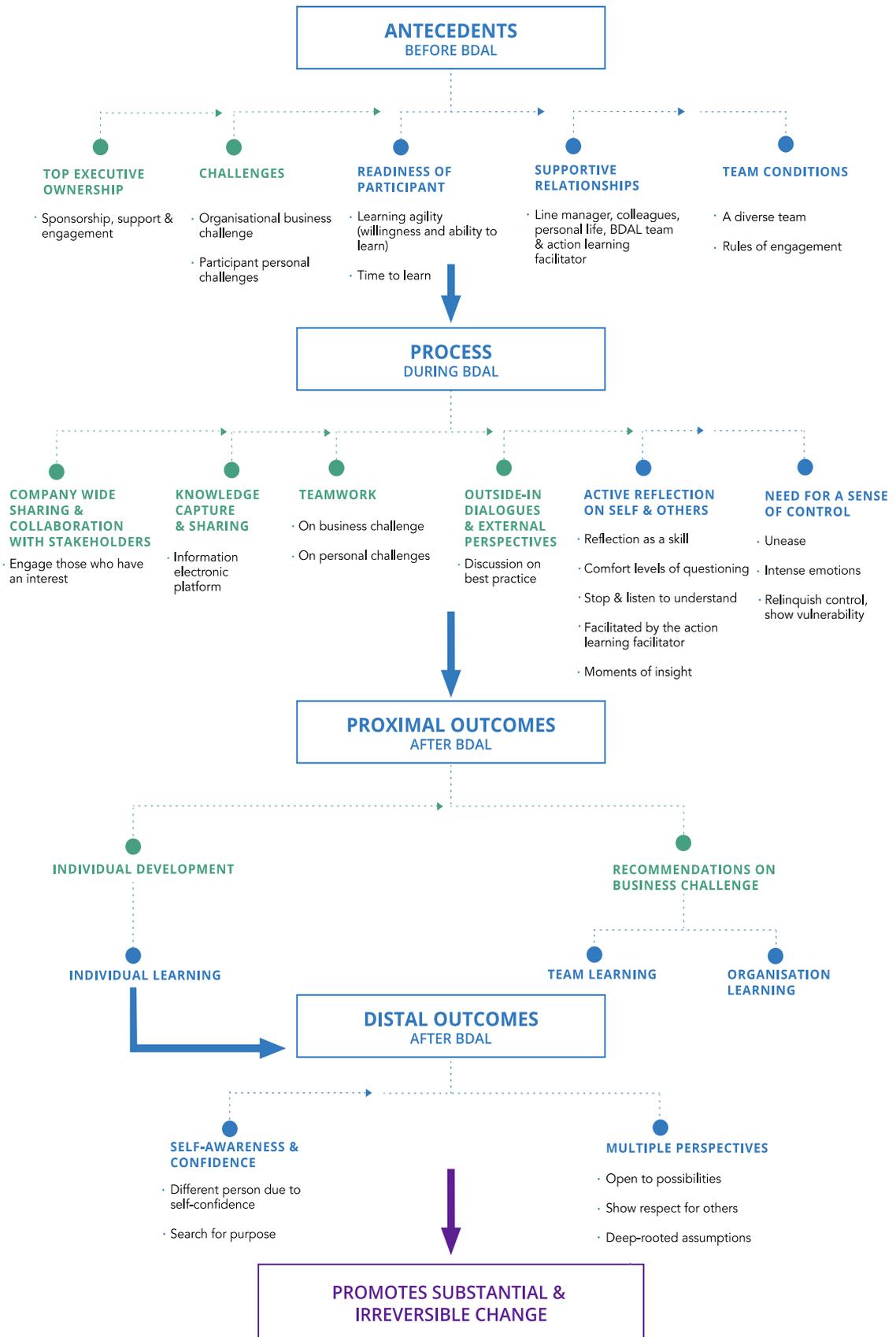


Figure 6.2. New conceptual framework: TBDAL

The aim of TBDAL is to assist with the design BDAL component parts that facilitate individual transformative learning during a management development programme. The intention of the TBDAL framework is not to be prescriptive but to provide guidance on the implementation of BDAL that promotes individual transformative learning. However, the researcher is of the opinion that individual transformative learning is not static and that a participant can continue to experience distal outcomes in the Hoggan's (2016) typology of transformative learning.

### **6.3.1 Antecedents before BDAL**

From the research findings antecedents are the preconditions that need to be in place before BDAL commences and this present study identified three additional components: readiness of participants, supportive relationships and team conditions. Whilst these additional components are not new they require in my opinion, based on this present study, additional understanding in the BDAL literature. The first component is *readiness* of the participant. If there is limited learning agility (willingness and ability to learn) or if the participant feels that they do not have enough time to spend on the BDAL project, then the participants experience unnecessary frustration. Willingness means that participants choose to develop themselves, as they are motivated to learn.

Ability to learn includes the participant's skills, such as working in a team and their cognitive ability. Conducting research on the business challenge and meeting with the team and stakeholders on the project suggests that participants need to have sufficient time when volunteering to be part of BDAL. As adult learners, the participants not only have their personal responsibilities in their home life and work to deliver but need to manage the demands of a management development programme together with BDAL, all of which can be challenging and time consuming. What is new is that the finding on the readiness of participants could have implications for the sponsoring organisation when they select participants for a management development programme that includes TBDAL.

The second component is supportive relationships, and this theme is not explored enough in the BDAL literature. Supportive relationships provide

emotional help during BDAL and equip participants to deal with BDAL challenges. The line manager, people in the participants' personal life, work colleagues, the action learning team and the action learning facilitator all provide a different type of support. If the line manager and colleagues provide support, they can help manage the participant's work pressures as well as help the participant to apply learning in the workplace. If people in the participant's personal life understand the demands of BDAL, then they can create a supportive home life. The action learning facilitator provides guidance on the BDAL process to help participants understand the action learning philosophy and how to implement BDAL. However, it is not the role of the action learning facilitator to make recommendations on 'how to tackle' the business challenge as this goes against the BDAL philosophy. The participants in the team play a key role in creating a supportive environment in team meetings whilst working on the business challenge. Supportive relationships are seen as an antecedent and need to be established before BDAL starts, but these relationships need to continue throughout BDAL. If the participant can contract with their action learning team using rules of engagement, it can create clear expectations. In addition, if contracting can take place with all supportive relationships, it can enable understanding around mutual expectations. A supportive learning environment is essential in creating transformative learning (Taylor, 1998).

The third component is team conditions. Setting up the team before BDAL starts is an important antecedent as these teams need to be diverse to create the possibility of new insights. BDAL teams experience similar issues to other problem solving teams where team dynamics play a role. The BDAL team should be diverse enough to encourage different views, share knowledge, apply different skills and experience; however, this can then lead to conflict and unease. In order to manage the team dynamics, each team needs to set rules of engagement that the participants are accountable for. All these insights resulted from the findings in this present study.

### **6.3.2 Process during BDAL**

This present study identified two new processes: active reflection on self and others and a need for a sense of control. The first component was active reflection on self and others. Reflection is a key component in both the action

learning and transformative learning literature. Nevertheless, this present study established that most participants found that reflection was a new skills for them as it is not something that they experience in their daily lives; they are so busy 'doing tasks' back at the workplace that they rarely take time to reflect on their own and others behaviour. To apply skills of reflection requires the support of the action learning facilitator who can guide the participants on reflective practice, as it can be a learnt skill. Reflective practice can be enhanced through the application of hand-drawn images and metaphors during journaling. It is also important to build reflection time into the programme design of TBDAL. Both the individual and the team are constantly involved in reflection with the aim of being mindful of how they are 'showing up', mindful of their emotions and actions taken. A journal can be applied as a tool for individual reflection to keep track of thoughts and behaviours.

Reflective practice entails participants to 'stop and listen to others to understand'. The research found that often participants felt that they knew the 'answers' to the business challenge and forgot about listening to other key stakeholders to fully understand the business challenge and hear what another person was saying and feeling. Through stopping and listening to understand others, participants indirectly learnt about themselves and the members in the team. The participants in the research concluded that BDAL was about individual learning through a team environment. The research found that together, the practices of questioning and active reflection caused participants to feel uneasy, which pushed them out of their comfort zones in learning. However, it is this being uncomfortable yet feeling supported that allowed for moments of insight to emerge during BDAL. Introspection also allows for 'aha moments' to take place. There are multiple opportunities for a moment of insight to take place during a BDAL programme. Due to a trigger, cognitive dissonance is created and often the participants' belief does not match the behaviour, giving rise to a moment of insight. It is this element of surprise that switches thinking out of unconscious thinking to conscious thinking.

The second component was the need for a sense of control. The need for control arose due to the unease and intense emotions that the participants experienced, especially at the beginning of BDAL. Participants struggle with

trying to gain a sense of control while working in a BDAL team. Firstly, participants often lack a sense of control as many participants have not had experience of working in a BDAL learning process and the process is new for them. Secondly, the business challenge is a *wicked problem* and this creates uncertainty. Thirdly, BDAL can involve intense emotions and if the participant is not able and willing to be vulnerable, it affects their ability to transform. Participants feel intense emotions during the BDAL experience, these include feelings of frustration, scared and stressed. Once participants realise that they are working in a team and not as an individual and that this team supports them, the pressure is reduced. When team members stop displaying power over their team members and operate as a peer group, there is less conflict and greater understanding of different viewpoints and assumptions. When participants start to understand what is expected of them, their confidence grows and they feel more in control of the learning. Hence, they gain a sense of control. This is where the paradox lies as the process results in intense emotions and dissonance but there must not be too much dissonance as this causes confusion, anxiety and blocks the potential for transformative learning. The aim is to create a challenging space which Robertson and Bell (2017) call a “safe yet unsafe space” so that the participant does not remain in a liminal space. In the research, participants mentioned that they needed to stop trying to control their team members and solutions for the business challenge.

Participants were sometimes unsure of how to manage the BDAL process, they tried to tell their team members what to do instead of being ‘comfortable in the uncomfortable space’ of learning. The research found that participants showed vulnerability by stepping outside of their comfort zone and sharing emotions, reduced their level of fear, which allowed them to be open to learning opportunities. The team (set) must make time to collaborate with one another, ask questions and work together to demystify assumptions and ensure understanding.

### **6.3.3 Proximal and distal outcomes after BDAL**

Outcomes include proximal and distal outcomes. The proximal outcomes are based on Boshyk’s (2014) theory that BDAL results in individual learning, team learning and organisational learning. It is individual transformative learning that

required understanding in this present study. This present study therefore explored the proximal outcome of individual learning, specifically individual transformative learning. Transformative learning takes place after a crisis (Laurel, Rajala, Ruokamo & Ylitapio-Mäntylä, 2011) hence the decision to place transformative learning as a distal outcome. Transformative learning is an outcome and these outcomes can take place during the management development programme, at the end of the programme or after the programme has been held. However transformative learning happens after reflection has taken place. The participants were not specific on when it took place, only that they had moments of insights (during and after) which can enable transformative learning.

The findings are presented in a framework based on systems theory that identifies individual component parts. The distal outcomes take place after and during a BDAL experience - there can be many experiences during BDAL so the distal outcomes can take place during a set meeting, during a meeting with a stakeholder, during a meeting with the action learning facilitator all of which can be reflected upon and has the potential to create a moment of insight.

The findings from this present study identified two typologies of individual transformative learning which can be called distal outcomes. The first outcome of self-awareness included being aware of one's own strengths and weaknesses. Participants can see themselves as being a 'different person' from the person who started the BDAL in the beginning of BDAL. As a result of self-awareness, self-confidence resulted as participants felt able to address personal challenges. Due to the increased self-confidence, participants started to search for their 'true' purpose, which means they left the BDAL experience asking many questions about themselves and their career.

The second outcome was the development of multiple perspectives. Multiple perspectives arose when the participants started to listen to members of their team; this allowed them to open up to hearing the possibilities in their personal and work lives. This piece of research shows that if participants are able to 'hear' other peoples' viewpoints by being less judgemental and more accommodating of other's ideas and needs, then there is the potential to gain multiple perspectives. In addition, if participants are able to be more patient and

tolerant towards others by being more socially aware of their surroundings then they allow themselves to be open towards 'hearing' different viewpoints. As a result of the BDAL experience, participants' deep-rooted perspective can be challenged and adapted.

In summary, the *before*, *during* and *after* aspects of BDAL contribute to creating a process for implementing BDAL that facilitates transformative learning. Transformative learning is defined as "processes that result in significant and irreversible changes in the way a person experiences, conceptualises and interacts with the world" (Hoggan, 2016, p. 71). According to Cranton (2002), there is no particular method that will guarantee transformative learning as transformative learning cannot be taught (Illerris, 2015). Despite this, TBDAL is a framework that can help provide guidance on 'how to' implement BDAL that facilitates individual transformative learning. This framework adheres to the action learning philosophy focusing on individuals and teams being responsible for their own learning and contributing to the organisation's business challenge. However, it also proposes a structured process to enable application of BDAL that supports transformative learning. In this framework, transformative learning can be facilitated by the four key stakeholders in BDAL to optimize the potential for individual transformative learning. The framework includes both the task of completing BDAL and the process of individual learning, thus keeping the balanced approach (learning and action) of action learning that BDAL aims to achieve. To help support the effective implementation of the TBDAL framework, conceptual guidelines for the four key stakeholders are suggested.

#### **6.4 CONCEPTUAL GUIDELINES, RECOMMENDATIONS AND CHECKLIST FOR STAKEHOLDERS**

TBDAL provides the framework to address the 'how to' apply BDAL that facilitates individual transformative learning; however, supporting guidelines for the four key stakeholders can be added to encourage the implementation of the framework. There is no order to which the checklist needs to be implemented as it depends on the nature of the management development programme.

The literature included research from Bong, et al.'s (2014) decision-making questions which aid in the implementation of action learning (Appendix 2);

however, these decision-making questions are not specific to BDAL nor do they consider individual transformative learning. Chapter Five included the findings and discussion that impact on the four key stakeholders, and it was this present study that enabled the recommendations and checklist that form the conceptual guidelines. The recommendations and checklists are broken down into decisions that need to take place before, during and after BDAL, with some of the before components needing to continue during BDAL. The purpose of the checklist is to guide the four stakeholders in implementing TBDAL. All the actions in the checklist require a 'yes' response to enable the implementation of the TBDAL framework. If there is a 'no' response then perhaps TBDAL is not the appropriate framework for the sponsoring organisation and the management development institution to apply to the proposed management development programme.

The founder of action learning, Reg Revans (2011, p. 33), was concerned with the action learning philosophy rather than "how to do it." However, since the initial development of traditional action learning, BDAL has developed into being both a philosophy and a process (Boshyk, 2010). Due to the various interpretations and lack of clarity on the implementation of action learning, it can be considered a "collective mosaic" (Dilworth & Willis, 2003, p. 15). This leaves the four key stakeholders in an action learning programme informed by BDAL room for interpretation on how to implement BDAL. What conceptual guidelines can be recommended for the four key stakeholders: the client organisation, the management development institution, the participant and the action learning coach (facilitator) to aid individual transformative learning in BDAL is addressed in this section. The conceptual guidelines are discussed in this section in the form of recommendations and a checklist that aids in TBDAL decision-making.

#### **6.4.1 Recommendations for the participant**

The first and primary stakeholder is the participant, as s/he is accountable for their own learning, as action learning places value of the team and its participants over lecturers, experts and facilitators (Pedler, et al., 2005). The suggested recommendations for the participants aim to adhere to adult learning principles, as participants need to be given a choice on what they need, want to learn and how they learn (Knowles, 1984). Action learning should be voluntary

(Pedler & Abbott, 2013) and is not suitable for all participants (Pedler, 1996), as each participant needs to be responsible for their own learning (Mezirow, 1990; Kitchenham, 2008). If the participant does not show readiness then maybe action learning is not the approach to take (Breathnach & Stephenson, 2011; Bourner, 2011a).

From the research findings, 'participant readiness' was a global theme and can be determined before TBDAL starts. Readiness is a condition that exists within the participant (Raelin, 2006). The findings explored what readiness consisted of, which was learning agility and available time to learn. Learning agility indicates that the participant shows willingness to learn and has the cognitive ability to learn and work within a team setting. TBDAL is time-consuming, so the participant should have enough time to work on the business challenge and personal challenges. In order to understand the time commitments and expectations around TBDAL, participants can talk to previous participants and action learning facilitators. In addition, they can read about a previous participant's experience in an interpretive story (Robertson, Le Sueur & Terblanche, 2018). Once participants understand the purpose of TBDAL, they can contract with relevant stakeholders, such as their line manager, colleagues and people in their personal life so that expectations around the TBDAL experience can be clarified, thereby creating space and the environment for the participant to learn.

The research findings also identified 'team conditions' as a global theme. To manage the diversity in the team, individual team members need to set and buy into the rules of engagement. The rules of engagement include setting a common team goal and individual learning goals (personal challenge). One of the key findings is that participants need to be accountable for these rules of engagement. Participants need to discuss how members can be made accountable for the goals set by the team; participants need to acknowledge that all members in the team have their own work and personal deadlines, learning styles and agendas and that these do not necessarily coincide with everyone else's in the team; discussions held on how the participants can accommodate each other's needs and work schedules need to take place.

The findings identified 'active reflection on self and others' as a global theme. Reflection is a necessary process in both action learning (Scott, 2017) and transformative learning (Moon, 1999). Reflection in BDAL involves asking questions to stimulate thinking instead of making statements. The research findings found that asking questions, as part of active reflection, has the potential to lead to moments of insight for the participant.

Metacognition is "knowledge and cognition about cognitive phenomena" (Flavell, 1979, p. 906). A tool that can be applied to encourage metacognition during active reflection is a learning journal. It is recommended that participants write and maintain a learning journal focusing on their individual learning during BDAL and after BDAL so that they are able to recognise their individual learning. Brook and Milner (2014) suggest the following five questions as a format for the journal:

- What did you learn from today's meeting?
- What did you learn about yourself?
- What did you learn about your strengths?
- What did you learn about your areas of development?
- How have you contributed to the learning of other team members?

A recommendation is that the journal could include Brook and Milner's (2014) questions, but participants could also include hand-drawn images to answer the five questions. Thereby, the participants have the 'language' to articulate their individual learning and giving depth to their understanding of learning.

The research findings identified 'sense of control' as a global theme. During TBDAL, participants can feel uneasy, which results in some participants trying to control other team members. Overall, participants need to be comfortable in the uncomfortable space of learning, hence the paradox of action learning (Robertson & Bell, 2017). The findings noted that if participants are willing to show vulnerability, this can encourage team members' understanding of one another and themselves.

A checklist for the participant is provided in Figure 6.1 to aid in decision-making for the participant. This checklist includes components that should take place

before (antecedents) and during (process) TBDAL. The checklist can be assessed by the sponsoring organisation together with the participant.

Table 6.1 Checklist for stakeholder group: participant

Component	Before
Antecedents: Readiness Team conditions	<ul style="list-style-type: none"> <li>• Does the participant want to attend a programme informed by TBDAL?</li> <li>• Does the participant have the time to learn?</li> <li>• Does the participant understand the time commitments of TBDAL?</li> <li>• Is the participant willing to make the time to work on the business challenge and their personal challenges?</li> <li>• Is the participant willing to work in a team of diverse participants?</li> <li>• Has the participant spent time getting to know their team members?</li> <li>• Has the participant, together with the team, identified individual's strengths and contributions to the team?</li> <li>• Has the participant set rules of engagement with their team?</li> <li>• Has the participant agreed to take accountability to work on the BDAL project (shown individual agency)?</li> <li>• Has the participant held conversations with their work colleagues, line manager and people in their personal life on the time demands of TBDAL and how this time might impact all parties?</li> </ul>

Component	During
Process: Sense of control Active reflection	<ul style="list-style-type: none"> <li>• Has the participant held team members accountable for the team's common goal?</li> <li>• Is the participant showing consideration towards team members time demands (i.e. not being individualistic in their demands of the team)</li> </ul>

	<ul style="list-style-type: none"> <li>• Is the participant asking questions instead of making statements?</li> <li>• Is the participant aware of their emotions during BDAL (this can be created through journaling)?</li> <li>• Is the participant willing not to impose their views on the team and to stop and listen to others ideas and inputs?</li> <li>• Is the participant willing to show patience, respect and tolerance towards team members?</li> <li>• Has the participant reflected inwards towards themselves and outwards towards others (this is called reflexivity)?</li> </ul>
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The participants require support as part of TBDAL and one of the supportive relationships is that with the action learning facilitator.

#### **6.4.2 Recommendations for the action learning coach/facilitator**

The second stakeholder is the action learning facilitator in BDAL. The role in BDAL is to facilitate learning which Boshyk's (2010) calls the personal development advisor. This role does not involve attending team meetings as the team members themselves own and run the meetings. The role includes team initiating and advising (O'Neil, 2007). The primary role of the facilitator is to serve as a catalyst for individual, team and organisational learning (Boshyk, 2014) not to solve the business challenge itself. It is important to note that the facilitator is not involved in task facilitation on how to solve the problem, but rather facilitating a learning environment that takes place, before and during the BDAL.

The findings included 'team conditions' as a global theme. Before TBDAL starts, the action learning facilitator, together with the sponsoring organisation, can ensure that the team consists of a diverse group of participants. To manage this diversity in the team, the facilitator can guide the group in setting a team charter that includes clear rules of engagement. However, it is the participants in the team's responsibility to adhere to the team charter and be accountable for their actions.

At the start of TBDAL, the action learning facilitator can encourage the participants to set their own individual learning goals as part of the personal challenges in BDAL, as well as a goal for the business challenge. The action learning facilitator, together with the sponsoring organisation, can ensure that the business challenge is aligned with organisational strategy. This increases the value of solving the business challenge and provides a return on investment tool for the sponsoring organisation.

The findings included 'active reflection on self and others as a global theme. The facilitator can guide the participant on the value of applying of hand-drawn images and metaphors in their learning journal. Hand-drawn images and metaphors help the participant to articulate their individual learning and make the learning visible. As a recommendation, the facilitator can apply the concept of 'learnt reflection' – in that participants can be encouraged to reflect and make time to reflect during the programme, using the assumption that all reflection can enhance learning, so that participants recognise their own and others' emotions, strengths and development areas.

The research findings included 'sense of control' as a global theme. Due to team diversity and constant questioning of the wicked business challenge, participants can experience intense emotions. Emotions include fear, hatred, rage and contempt (Vince & Martin, 1993). Due to these intense emotions, some participants have a need to control the environment and other team members. The action learning facilitator can help participants recognise their emotions, especially frustration. Transformative learning begins outside of the comfort zone; however, the facilitator cannot force transformative learning on a participant but can only enable a transformative learning environment by creating a challenging yet safe space in which to learn. Robertson and Bell's (2017) article mentions the paradox of creating a safe space in action learning. As facilitators of action learning this is important to recognise as the role of an action learning facilitator is to craft a trusted safe space for learning. However, the facilitator can only encourage and facilitate conversations with individual participants and the team around their struggles in BDAL and cannot force individual transformative learning.

To meet these recommendations, a checklist for the action learning facilitator is provided in Figure 6.2 and includes questions that relate to *before* and *during* TBDAL.

Table 6.2 Checklist for stakeholder group: action learning facilitator in BDAL

Components	Before
Antecedents: Team conditions	<ul style="list-style-type: none"> <li>• Has the facilitator configured diverse teams?</li> <li>• Has the facilitator explored with the team how to set up a team charter that includes clear rules of engagement that team members are accountable for?</li> <li>• Has the facilitator encourage the participants to set their own personal learning challenge/s?</li> </ul>

Components	During
Process: Active reflection Sense of control	<ul style="list-style-type: none"> <li>• Has the facilitator briefed the participants on the importance of reflection?</li> <li>• Has the facilitator encouraged journaling to promote deeper learning?</li> <li>• Has the facilitator shared skills on how to reflect as part of learnt reflection?</li> <li>• Has the facilitator given the individuals the opportunity to discuss how they are feeling about the TBDAL experience?</li> <li>• Does the action learning facilitator feel comfortable with the unease that is created during TBDAL?</li> </ul>

The action learning facilitator plays a key role in supporting the participant and the team before, during and after TBDAL. The facilitator can play a linking role between the participant and the sponsoring organisation.

#### 6.4.3 Recommendations for the sponsoring organisation

The third stakeholder is the sponsoring organisation. The sponsoring organisation pays for the management development programme and in turn expect a return on investment regarding the business challenge, this is achieved when the solutions for the business challenge are successfully

implemented (Boshyk, 2014). The research findings included 'readiness of the participant' as a global theme. The sponsoring organisation should select participants who are ready for TBDAL; in other words, select participant who have the ability and willingness (learning agility) to work on complex business challenges. Learning agility is a valuable indicator in selecting candidates for management development. There are various assessments that determine learning ability which are based on self-assessments, behavioural interviews or multi-rater surveys. In addition, the sponsoring organisation has to select participants who have time to work on the BDAL project. The line manager can hold a discussion with the participants on their commitments (personal and work related) around other studies, projects, job role and available time before they are selected to attend a management development programme.

It is the sponsoring organisation's responsibility to define the business challenge (Boshyk, 2011), which the sponsor, as part of the sponsoring organisation, contributes to. The sponsor from the sponsoring organisation is one of the key role players (Rothwell, 1993). Selection of sponsors is important as these people need to provide the appropriate support to the team. The sponsor was not specifically included in this present study; however, they are part of the sponsoring organisation. It is the function of the sponsor to ensure that the business challenge has a strategic focus. The sponsoring organisation needs to identify a wicked business challenges for participants to work on so that the projects are of real value to the business – real pain points, problems or challenges that need to be addressed and if addressed, could make a difference to the business and the participants' individual learning in the process.

The research findings included 'supportive relationships' as a global theme. These supportive relationships start at the beginning of BDAL but continue throughout the process. They can continue even after BDAL has been completed as participants mentioned in their interpretive stories the use of mentors and coaches after BDAL to support them in their development. When the participant has completed BDAL, it is important to support the participant back in the workplace. A suggestion would be to encourage a mentoring relationship. Human Resource professionals and line managers who advocate

for BDAL within their organisations need to be aware that participants who have gone through BDAL can start looking for a new purpose and can develop their career. To solve this dilemma, career conversations between the line manager and the participant should be encouraged by the sponsoring organisation.

To meet these recommendations, a checklist for the sponsoring organisation is provided in Table 6.3. The checklist includes *before* and *after* questions for the sponsoring organisation.

Table 6.3 Checklist for stakeholder group: sponsoring organisation

Components	Before
Antecedents: Readiness Supportive relationships	<ul style="list-style-type: none"> <li>• Does the participant display readiness to be part of TBDAL?</li> <li>• Sponsoring organisation to consider the following in selection for TBDAL: career stage, development needs and motivation to attend.</li> <li>• Has the sponsor as part of the sponsoring organisation defined a business challenge that has a strategic focus?</li> <li>• Does the participant have a supportive line manager – support is shown by showing interest in the participant’s individual development, giving them time to attend the management development programme and for asking questions on the progress of the BDAL project?</li> <li>• Does the participant have supportive work colleagues?</li> </ul>

Components	After
Supportive relationships	<ul style="list-style-type: none"> <li>• Has the sponsoring organisation provided support in the form of career discussions, coach or mentor?</li> </ul>

#### 6.4.4 Recommendations for the learning institution

The fourth stakeholder is the learning institution. The learning institution’s main responsibility is to facilitate TBDAL into the overall programme design so that the TBDAL is not a team project appended onto the end of a management

development programme. TBDAL should be integrated into the programme design. The action learning philosophy is important to consider in programme design so that TBDAL does not become just a process. The research findings included ‘active reflection on self and others’ as a global theme. Through active reflection, the participant is able to increase their self-awareness, which is a transformative learning outcome. Therefore, reflection time should be scheduled into the management development programme informed by TBDAL by the learning institution

To meet these recommendations, a checklist for the learning institution is provided in Table 6.4. The checklist includes questions for *before* TBDAL.

Table 6.4 Checklist for stakeholder group: learning institution

Components	Before
Antecedents: Readiness of participants Supportive relationships	<ul style="list-style-type: none"> <li>• Has the learning institution briefed the sponsoring organisation on the importance of selecting participants who are ready for learning?</li> <li>• Has the learning institution briefed the sponsoring organisation on the importance of having supportive line managers?</li> <li>• Has the learning institution found an action learning facilitator that plays a supportive role and understands the BDAL philosophy and transformative learning?</li> <li>• Has the learning institution built reflection time into the design a programme informed by TBDAL</li> <li>• Has the learning institution built support from the line manager, team and the facilitator into the design of a programme informed by TBDAL?</li> </ul>

It is recommended that the new conceptual framework, TBDAL, be applied to the design and facilitation of BDAL which includes individual transformative learning; however, it needs to be tailor-made to meet the needs of each sponsoring organisation and learning institution. It therefore, supports Bong, et al.’s (2014, p. 292) comment that “an action learning programme should not be treated as a conveyor belt producing mass products.” Importantly it needs to be

mentioned that should the 'before' and 'during' component parts not be included in the management development programme design then there is the possibility that the 'after' component part of distal outcomes (i.e. individual transformative outcomes) might not be achieved. In addition the conceptual guidelines are only a recommendation and not a rule and not every bullet point needs to be adhered to depending on the needs of the four key stakeholders.

The conceptual framework and guidelines support Taylor and Cranton (2012, p. 3) in creating "a more unified theory" that "allows us to continue to speak of transformative learning while maintaining the diversity of approaches that are so important to the complexity of the field of adult education." The findings contribute to BDAL in a management development programme context, which is important to note. It is important that this new conceptual framework of TBDAL remains organic in its identity so that it can meet the needs of a management development context. The aim was to not make TBDAL prescriptive, as it is a framework that can include the changing landscape of business and education.

## **6.5 CONTRIBUTION OF THE RESEARCH**

This present study contributes to three areas: scholarly, practice and methodological. As a result making the contribution of this present study unique.

### **6.5.1 Scholarly contributions**

This section outlines the numerous scholarly contributions that this present study makes. Each of the following seven points are discussed in detail in this section: TBDAL framework, individual invisible learning, need for a sense of control, active reflection on self and others, conceptual guidelines for the four key stakeholders, readiness and deep learning.

The first scholarly contribution is the TBDAL framework, which contributes to the theory on BDAL component parts. The TBDAL framework includes additional component parts (readiness of the participant, supportive relationships, team conditions, active reflection on self and others, need for a sense of control, self-awareness and confidence and multiple perspectives) all of which make a contribution to Boshyk's (2010) component parts. The TBDAL framework also adds to the knowledge on Cho and Egan's (2009) action learning conceptual framework on the key dimensions of action learning (Figure

2.2). Cho and Egan's (2009) action learning conceptual framework includes key features of action learning with specific reference to antecedents, process, proximal outcomes and distal outcomes. *Learning* is considered a distal outcome in Cho and Egan's (2009) framework but the framework does not explore the concept of learning in detail and it is an action learning framework that is not specific to BDAL. Cho and Egan's (2009) framework is applicable in an action learning context in Korea. Regardless of this, TBDAL follows a similar systems thinking design of antecedents, process, proximal outcomes and distal outcomes

TBDAL explicitly integrates the theories of BDAL and individual transformative learning in a framework. By integrating BDAL and individual transformative learning, this present study addresses the call from Taylor (2007) who requests for additional research on transformative learning in different contexts. It also answered the call from Pedler, et al. (2005) who argue for exploring thoughtful variations of action learning. The literature on integrating BDAL and individual transformative learning is thin.

The second contribution is to the understanding of individual invisible learning, which contributes to Bong and Cho's (2017) typology of success factors in action learning. In this study the invisible individual learning can be described as individual transformative learning which includes multiple perspectives and self-awareness and self-confidence. A complaint aimed against the employment of action learning is that learning, as a whole, is often sacrificed as the participant focuses mainly on completing the task of the BDAL project (Raelin & Raelin, 2006). Overall, there is very little mention of individual learning in comparison to team learning in the action learning literature (Yadin & Or-Bach, 2010). BDAL is positioned as a learning methodology that develops the individual, team and the organisation (Boshyk, 2015) and the contribution is to the knowledge on individual learning, specifically individual transformative learning. Without fully understanding individual learning, team and organisational learning cannot be understood, as individuals make up teams and organisations. Individual learning is necessary as it is a pre-requisite for team learning, which is supported in literature by Dillenbourg (2005) and Stahl, et al. (2006).

The third scholarly contribution is the understanding of the need for a sense of control during BDAL which contributes to the theory on tension and emotions in action learning. In the literature emotions are discussed (Trehan & Rigg, 2015; Vince, et al. 2017) but the findings in this present study found that the need for a sense of control needs to be managed as it could hamper the BDAL process. The research findings confirmed that if participants relinquished their need for a sense of control over the environment and team members by showing their own vulnerability during BDAL, they were more open to learning opportunities. To relinquish control means that the participant needed to be more vulnerable which involves being emotionally available and open (Whiting & Cutri, 2015).

The fourth scholarly contribution is active reflection on self and which contributes towards the theory on reflection. Reflection itself is not new in action learning literature however not all participant have reflection as a skill. Yadin and Or-Bach (2010) wrote that participants are expected to have already become skilled learners before they attend a programme and the findings from this present study showed that reflection was a new skill for certain participants. The contribution is that reflection should be facilitated in TBDAL. Ryan and Ryan (2010) concluded that there is limited literature on facilitating reflective learning across higher education programmes. This present study determined that through active reflection on self and others, participants were able to experience moments of insight making the individual learning visible.

This present study contributes to understanding of the role of the action learning facilitator in BDAL in enabling active reflection and enhancing reflexivity.

The fifth contribution is the conceptual guidelines that contribute to the knowledge on decision making for the stakeholders involved in TBDAL. Bong, et al. (2014) devised decision making questions (Appendix 2) for general action learning whereas this present study contributes decision making questions in the form of conceptual guidelines for the four key stakeholders in TBDAL.

The sixth scholarly contribution is to the theory on readiness in action learning. Readiness of the participant is not a new finding as it has already been identified as a critical success factor in action learning (Raelin, 2006, Revans, 1991) and transformative learning (Mezirow, 1998b). The contribution of this

present study to the theory is the unpacking of the term 'readiness of the participant to learn' which includes willingness, ability and time to learn as antecedents to TBDAL.

The seventh scholarly contribution is to the theory on deep learning. Hoggan (2016) uses depth of learning as one of the transformative learning criterion, however there was not sufficient understanding of *depth of learning* in the literature. By using Sterling's (2010-1011) model to represent deep learning helped in the analysis of deep learning in individual transformative learning.

### **6.5.2 Practice contributions**

This section is a summary of the contribution to the practice of BDAL. It is recommended that the four key stakeholders apply the TBDAL framework and the conceptual guidelines to a management development programme. The TBDAL framework contributes to the design, facilitation and implementation of TBDAL in management development programmes. Design of a programme is seen as a fundamental success factor of action learning (O'Neil & Marsick, 2007; Pedler & Abbott, 2013; Revans, 2011) and from the researcher's knowledge, there are few BDAL frameworks that provide guidance on how to implement BDAL, besides Boshyk's (2010) component parts. In addition transformative learning is often not built into the design of a programme as it is seen as a by-product instead of the main aim in education (Taylor & Laros, 2014). This present study developed a TBDAL framework and conceptual guidelines that contribute to the design and implementation of a management development programme thereby ensuring that BDAL and transformative learning are not by-products of a management development programme. In addition the TBDAL framework and conceptual guidelines allow the four key stakeholders to better prepare for their roles in TBDAL.

Sponsoring organisation: Participant readiness (willingness, ability and available time) should be a key consideration when the sponsoring organisation selects participants to be involved in TBDAL. These findings support the theory on adult learning characteristics that participants must want to learn (Knowles, 1984) and that participants must have a mature cognitive level for transformative learning to occur (Merriam, 2004). This could mean that a participant who is not

ready should not be selected for a management development programme that includes TBDAL, as there are other types of management development programmes that can meet their needs.

The action learning facilitator: The action learning facilitator plays a supportive role during in TBDAL, with greater emphasis at the beginning of TBDAL where the facilitator encourages diversity in the set composition. Diversity in teams is necessary so that different worldviews are included in team meetings. The facilitator can encourage teams to set clear rules of engagement that guide team interactions. Transformative learning cannot be taught, but one of the key functions of the action learning facilitator is to enable active reflection on self and others. One of the key problems in management development programmes is how to 'teach' self-awareness and relationships skills (Clydesdale, 2016). The findings indicated that one of the ways to create self-awareness was for the participants to be actively engaged in reflexivity, which can be a learnt behaviour. It is recommended that the action learning facilitator plays an active role in enabling reflective practice within the TBDAL experience.

The findings indicted that the participants feel unease and try to gain a sense of control during BDAL. One of the recommendations is for the action learning facilitator to share an interpretive story with participants. The interpretive stories are a tool that can enable reflective practice on previous participants' experiences so that the current participants can then reflect on their own experience. The purpose is to help participants to see that emotions and frustrations are a normal part of the BDAL learning experience, and only through this struggle can they create the potential for transformative learning (Robertson, Le Sueur & Terblanche, 2018).

The learning institution: It is recommended that the learning institution applies TBDAL as part of its learning methodology. Nevertheless it must be remembered that TBDAL is not appropriate for all management development programmes, as the sponsoring organisation and the participants must support action learning and be ready for action learning.

The participant: Action learning philosophy includes the participant being responsible for their own learning. The research findings emphasised that

participants must display readiness (learning agility and time) before they volunteer to be part of TBDAL.

### **6.5.3 Research methodology contributions**

This present study also contributes on a methodological level. Glover (2004) suggested that there is an opportunity to broaden the methodological approach in narrative inquiry. This present study contributes to narrative inquiry, specifically the theory on data gathering and analysing narratives. In terms of data gathering, the data gathering method from Phase Three applied the draw-write-tell method (Angell, et al., 2015), whereas Phase Four included a different sample where participants wrote down the similarities and differences of their experience in comparison to those participants in Phase Three. The contribution is to the data-gathering method: draw-write-tell-method as it includes an additional aspect of writing from a separate sample, the method was thus a draw-write-tell-write method. Drawings with children in education remain an under-reported research method (Kearney & Hyle, 2004), however there is also a lack of reporting of drawings with adults. In this present study the hand-drawn images were completed preceding the narrative interview with the aim to increase the richness of the narrative. By drawing the image before the in-depth interview, the participant had time to reflect on their learning and were more articulate during the in-depth interview. The hand-drawn images included metaphors and emotions which aided in the understanding of the BDAL experience. In addition, the use of hand-drawn images contributes to literature on narrative inquiry since hand-drawn images assisted the participant to reflect on the BDAL experience before attending the in-depth interview. The findings supported the theory that hand-drawn images enabled the participants to illustrate ideas in a physical and a more specific way than words (Broadbent, et al., 2006). There were also multiple data gathering phases, which together honoured multiple aesthetic perspectives in the development of the research (Mello cited in Clandinin, 2007). The findings support Hopperstad's (2010) conclusion that hand-drawn images portray ideas and understanding in ways language may not offer. Hand-drawn images, together with an in-depth interview, proved to be a tool in aiding participants in telling their story as part of narrative inquiry.

In terms of data analysis, this present study applied McCormack's (2000a; 2000b) four lenses: process, context, language and moments to the writing of interpretive stories; however, this present study not only applied these lenses to the transcripts but also to the hand-drawn images, thus giving the stories depth. McCormack's (2004) lenses were comprehensive in helping with the analysis in narrative inquiry due to the large amounts of text in the transcripts. The contribution of hand-drawn images is that it helped the participants to articulate their learning experience through the reflection time as part of hand-drawn images. The interpretive stories (with their images) still required interpretation, hence the choice to apply Braun and Clarke's (2006) thematic analysis, thus adding to the knowledge on narrative analysis. In addition, the inclusion of thematic diagrams as part of thematic analysis, as suggested by Attride-Sterling (2001), to the analysis of the interpretive stories provided a structure to the analysis of narratives. The research found novel ways of applying narrative inquiry, and the contribution in this present study broadens the methodological approach in narrative inquiry.

#### **6.5.4 Personal contribution: Reflection from the researcher**

As part of reflexivity, Creswell and Poth (2016) and Wolcott (2010) suggest that in qualitative research the researcher shares what they personally gained from the research. I have gained considerably during my PhD journey and this section is a reflection on my own individual learning and how I have changed.

I was surprised that participants gave so freely of their time to support me in my research. Hand-drawn images are difficult to draw and are time consuming. The global themes of active reflection on self and others and the need for a sense of control provide me with insight into what needs to take place during BDAL to enable individual transformative learning.

In summary I think it is fitting that I include a hand-drawn image of how I feel after completing my PhD in Figure 6.3.



Figure 6.3 Hand-drawn image

In Figure 6.3 there are four roses. The first rose represents my fear of taking on the challenge of a PhD and I delayed doing so for many years. The second rose represents me taking on the challenge of my PhD. I have always been a determined learner and writing a PhD whilst being a mother of two children, wife and running my own business had many challenges. However, the journey has been worth it as it has given me additional rigour in my thinking and the confidence to believe in my academic ability. In addition my colleagues have mentioned that they see a change in me. I now consider not only the practice of BDAL, but also the theory behind the practice. As an inexperienced researcher in qualitative research I have found that I have learnt so much during this journey and have gained knowledge about narrative inquiry. I feel that this PhD journey has given me the assurance in areas that I did not feel confident in. The third rose represents my new found confidence whilst the fourth rose represents how I want to take 'action' on my learning from my PhD. Using the role metaphor I would like to 'sow seed' from the rose for further contributions in this field. I have already written two articles that arose from this present study namely:

- Robertson, J. & Bell, D. (2017). Safe or unsafe? The paradox of action learning. *Action Learning: Research and Practice*, 14(2), 185-196.

- Robertson, J., Le Sueur, H., & Terblanche, N. (2018). An account of practice: Employing drawings and stories to enable reflective learning. *Action Learning: Research and Practice*, 1-10 (I have shared this article with participants on a management development programme at the beginning of BDAL to help them deal with their fears).

To continue on this path I would like to write an article on the TBDAL framework to enhance the practice of BDAL. I have also enhanced my own practice in line with the conceptual guidelines for the action learning facilitator. I am better equipped to help participants prepare for their BDAL journey as I have a greater understanding of the philosophy, benefits and challenges of action learning, specifically BDAL and individual transformative learning in a management development context. Lastly, I have added to the understanding of analysing narratives and would like to publish on this topic too.

## **6.6 LIMITATIONS AND FURTHER RESEARCH**

The limitations of this present study pertain to the research design, sampling and data gathering. Each of these are elaborated on in this section, together with suggestions for further research.

In terms of research design, even though narrative inquiry is well suited to this present study, there are limitations to the design. Narrative inquiry includes an individual's experiences and captures feelings in the form of stories where there is uncertainty and complexity. These stories are fundamentally individual constructs of human experience and have limitations when shared with the researcher. For further research, other approaches, such as ethnography, can be applied to explore individual learning in more detail. Ethnography would be appropriate as it involves researching a group of people over a period of time and hence transformative learning could be explored in greater detail back in the workplace and at home to meet Hoggan's (2016) criterion of breadth in more detail.

A limitation is that the sample was chosen from one learning institution, however the BDAL approach taken met the requirements of the BDAL component parts. In terms of sampling, a limitation could be that initially,

participants in Phase Three volunteered to be part of this present study; therefore, sampling bias could be seen as a limitation in this present study. However, later on when promoted by the initial participants, additional participants agreed to be part of the sample, so the sample was not purely based only on first time volunteers. To try and combat the pressure of providing the researcher with the 'right' answer, the researcher explained to participants that pseudonyms would be applied to the stories and that the sponsoring organisation's name would not be mentioned. Nevertheless, even though this was done, it is possible that some participants may have responded in a manner that is socially desirable and if so they may have provided answers that they felt the researcher was looking for.

Further research could include a sample group who did not volunteer. Understanding why they did not volunteer could give insight into the challenges and frustrations regarding BDAL. Future research could include a sample of participants who did not consider BDAL to be valuable and why they did not find it valuable. Purposive sampling could be applied through reaching out to certain communities who were not represented in this sample.

In terms of data gathering, Phase Three data gathering was collected at two separate points of time, and the implication of this is that only a snapshot view of each participant was created. McCormack (2000a; 2000b) in her research included multiple in-depth interviews, which gave greater depth to her research. In this present study, there were time constraints for the participants and the researcher. A longitudinal study is a suggestion for future research, thereby contributing to the findings from this present study. In terms of a longitudinal study, the participants could be analysed over a period from before they start BDAL, during BDAL and after BDAL. Jacobs (2008) suggests a longitudinal study in action learning following participants over a longer time frame and focusing on the reflexive dimension of learning. In addition, a longitudinal study would also speak to Hoggan's (2016) criterion of transformative learning including 'relative sustainability.'

Further research could address the needs of the changing work environment to include: How to address the needs of the team using a virtual action learning

facilitator? How might action learning facilitators utilise technology to enhance the process during BDAL?

Jacobs (2008) concluded that further research is necessary on how emotions obstruct learning. This present study identified that participants experience intense emotions, however this is not new and was discussed in the literature on action learning. Additional research could explore how emotions themselves impact on individual transformative learning in BDAL.

## **6.7 CONCLUSION**

The research aim, which was to design a conceptual framework to assist in the facilitation of transformative learning during BDAL in a management development context, has been met. This present study explored how (if at all) individual transformative learning could be embedded into a BDAL framework.

Overall, this present study explored the potential for individual learning, with specific reference to transformative learning, during BDAL. Individual learning during BDAL is often not recognised, as there is an overall emphasis on solving the 'wicked' business challenge. The purpose of this present study was to articulate the individual transformative learning that participants experienced as a result of partaking in a BDAL project in a management development programme.

The design of BDAL contributes to the potential for transformative learning and the contribution to individual learning. This present study produced a new TBDAL conceptual framework that included antecedents, process and outcomes of BDAL that promote substantial and irreversible change in the individual. In addition, conceptual guidelines for the four key stakeholder groups were suggested as recommendations and a checklist to support the TBDAL framework. It is the participants, the learning institution, the action learning coach, and the sponsoring organisation that are responsible for encouraging transformative learning within BDAL. This present study addressed the overarching research question namely: How should a BDAL framework be designed to facilitate individual transformative learning during a management development programme?. This present study produced scholarly, practice and methodological contributions.

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## APPENDICES

### Appendix 1: A typical management development programme with BDAL

In the context of this present study, learning institutions customize training and development of a senior management development programme for a corporate client (sponsoring organisation). A typical management development programme that includes BDAL is co-designed with the sponsoring organisation and the learning institution's programme designers. Although each management development programme has different objectives, the overall programme aims to increase leadership and management skills to respond to the complex world of work, and to embed best practice and complex thinking through BDAL.

Each management development programme includes an orientation day, three study schools of five workshop days each and three additional contact days with the action learning facilitator which is called a feedback loop. The topics for the workshops include: managing projects for strategic advantage, economic and global trends, strategy, leadership, human capital, innovation and design thinking, marketing, finance, sustainability and operational effectiveness. Figure below represents a typical action learning management development programme informed by BDAL.

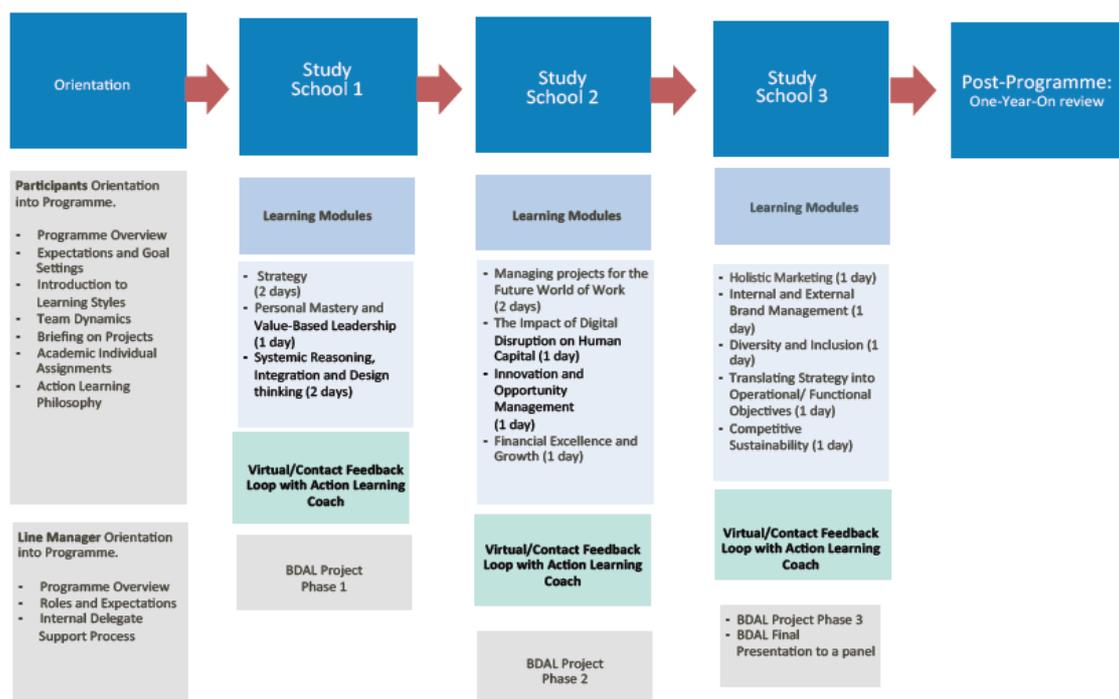


Figure: High-level architecture of a management development programme.

The BDAL philosophy, learning styles, team dynamics and how to scope a BDAL project is introduced to the participants during an orientation day at the start of the programme. The purpose of the action learning facilitator is to help the sets work towards a collaborative learning experience. The set is not dependent on the action learning facilitator, but rather they learn 'with and from each other' (Revans, 1982, pp. 767-768). Sets meet during the study school and between study schools to work on their business challenge. The action learning facilitator/coach meets with the sets between the study schools to provide support. The role of the action learning facilitator is to focus attention on relationships, strategic business issues and personal growth (Hargrove, 2003). The action learning facilitators are not seen as specialists whose role is to offer solutions, but rather as enablers of the process, to guide questioning and encourage learning.

The organisation's executive team identifies a number of organisational challenges (BDAL topics), and each set works on one of the topics. Marsick and O'Neil (1999) posit that sets consist of individuals working on the same problem. The aim is to ensure collaboration across regions and designations so that participants are exposed to each other's roles and divisions to ensure understanding across the business. Each set consists of six participants who work on the business challenge over the programme.

Each group (set) has a sponsor from the organisation to support them in their project. This person is chosen based on their seniority and influence in the organisation. The aim is for the sponsor to open doors and ensure that any internal political issues do not hinder the progress of the project.

## Appendix 2: Action learning decision making questions

The questions were devised by Bong, Cho & Kim (2014, pp. 290-291) to support decision making during action learning.

Table: Decision making questions

Classification	Categories	Decision making questions
Environmental analysis	Strategic fit	How will action learning contribute to an organisation's strategic goal? How will we align the design of action learning with an organisation's strategy?
	Competitive advantage	How will we make a distinction of action learning with other development programmes? How will action learning provide benefits for organisational members?
	Cultural fit	What are the positive and negative impacts of action learning on the organisational culture? What are the ways to maximise the positives and minimise the negatives?
	Affordability of resources	What resources (personal, physical and time) are required to make action learning successful? How will the resources be acquired?
Purpose & product definition	Program goals	What do sponsors want? What is the goal of an action learning programme?
	Products	What will be the outcomes (e.g. competence and knowledge) that participants would acquire? What would be the intended output?
	Performance evaluation	How will you define the effectiveness of the program? Who/when/how will you evaluate outcomes of the program?
Project selection and definition	Project selection	What type of action learning (a single or multiple project) will be used?

Classification	Categories	Decision making questions
		How will you support the project selection process?
	Output definition	What will the output be like? How will you support the output definition process between sponsors and participants?
People analysis	Participants	How will you select participants? What are their characteristics and needs?
	Motivating participants	How will you motivate participants? How will you avoid free riders?
	Sponsors	How will you promote sponsors' understanding of the action learning? How will you promote sponsor interest and support?
	Stakeholder analysis	Who will be the stakeholders (e.g. learning coaches and practitioners) other than participants? How will you motivate stakeholders?
	Roles of a learning coach	How will you ensure the quality of learning coaches in an action learning programme?
Process design	Operation	How will you design the entire process? How will you react to situations where the action learning process is not working as planned?
	Reflection	How will you encourage reflection? How will you react to situations where participants do not enact reflection?
	Follow-ups	Who/when/how will take care of the follow-up activities? How will you react to situations where follow-ups are not enacted?

### Appendix 3: Final interview guide

The revised and final interview guide, using Hoggan's (2016) typology of learning was applied to the in-depth interview.

Table: Hoggan's (2016) typology and interview questions

Typology (Hoggan)	Interview questions
Picture: 'Aha moments'	Can you talk me through your picture...can you explain the symbols/images/metaphors in the picture? Did you have any aha moments? Can you describe your most significant 'aha moment'? How did this moment start? Can you tell me how you experienced drawing your learning? Was it easy/hard, how did it help/hinder in articulating your ideas?
Self	Can you give me some examples where you went through significant change within yourself? What assumptions did you make about yourself before you worked on BDAL and have those assumptions change?
Worldview/Paradigm/ Mental model	What new awareness do you have since working on your BDAL? Explain. Can you give me some examples where you changed your beliefs?
Epistemology	Can you give me some examples during BDAL where you challenged yourself. What did you learn from this?
Ontology	Describe your emotions as you worked on the BDAL project. (...and then what happened?)
Unlearning	Did you find that there was something you had to unlearn?
Others	Have your family, friends or work colleagues commented on any changes that they have seen in you?

## **Appendix 4: Letter of consent**

All participants in Phase Three and Phase Four research were sent a letter via email to ask for permission to participate in this present study.

### **Phase Three letter of consent**

Dear Participant,

Thank you for volunteering to be a candidate for a research based on your recent, successful completion, of the Senior Management Programme.

I am requesting your permission to conduct research on BDAL. The overall aim of this present study is to explore the individual transformative learning experienced by participants during the completion of their BDAL projects in a management development programme.

I would greatly appreciate it if you would agree to participate in the above-mentioned research. The data will be pulled and individual results from this present study will remain confidential and anonymous. The results of this present study are to be used for educational purposes only in professional presentations and educational publications.

Attached please find a letter, written on your behalf, which gives me permission to use data from the SMDP programme you attended. If you agree to the letter's contents, please sign it in the appropriate place, scan it and forward it to me via email at Jane Robertson, [trainingpartners@mweb.co.za](mailto:trainingpartners@mweb.co.za) before your interview.

Thank you for your time and consideration in this matter.

Yours sincerely,

Jane Robertson

Dear Participant,

I am conducting research on transformative learning during Business-Driven Action Learning (BDAL); the research is about your personal learning.

It would be appreciated if you could agree to participate in the above-mentioned research. The results of this present study are to be used in a thesis, to fulfil the requirements towards a PhD degree at Stellenbosch University. In addition, this information may be used for educational purposes of professional presentations and/or to educational publications.

### **1. PURPOSE OF THE RESEARCH**

The purpose of the research is to answer the question: “How, and if does individual transformative learning during a business-driven action learning management development programme take place?”

### **2. PROCEDURES**

If you volunteer to participate in this present study, I would ask you to do the following:

A). Please hand draw a picture that expresses your **individual/personal learning** that resulted while working on the BDAL project.

During BDAL, you learn about yourself, the team and the organisation. This present study is about your learning not your organisational or other participants learning.

Think about your individual learning during BDAL and draw this learning in a sketch. To help you draw your picture please read the tips below:

1. I am happy if you draw sketches as I am not interested in your ability to draw but rather your story of deep learning (please don't use computer aided images).
2. Feel free to use colour if your wish.
3. Only draw events linked to the BDAL experience. Don't include learning from the assignments or the workshops.
4. *If you had any 'aha moment(s)' please draw them*
5. What caused each 'aha moment' to take place?
6. What are the outcomes/results of each 'aha moment'?
7. Please write on the back of your drawing an explanation telling the story behind your picture.
8. This would need to be completed before the interview. Please email me the picture and the description before the interview date.

B). Participate in one individual semi-structured interview (60 minutes). This would involve reflecting on your learning.

### **3. POTENTIAL RISKS AND DISCOMFORTS**

If, at any time, you express any significant discomfort, I undertake to terminate the interview immediately.

#### **4. POTENTIAL BENEFITS TO SUBJECTS AND/OR TO SOCIETY**

This present study is intended for contribution to the educational experience of future participants on programmes applying the philosophy of BDAL. In addition, it will be used to improve the practice of BDAL in management development programmes.

#### **5. CONFIDENTIALITY**

Any information obtained from this present study and that has the potential of being linked back to you (refer to point no. 2 above) will remain confidential and will be disclosed only with your permission, or as required by law. Pseudonyms will be used to ensure confidentiality. Under no circumstance, whatsoever, will you be identified by name in the course of this present study, or in any publication thereof. Every effort will be made that all information provided by you will be treated as strictly confidential.

All data will be coded and securely stored, and will be used for professional purposes only. Only the researcher and supervisors will have access to the data.

Audiotaping is part of this present study. Only the researcher and supervisors will have access to written and audiotaped materials. You, as participant, have the right to review and edit the audiotapes and the interpretive story that will be written by the researcher.

This present study has received ethical clearance (to ensure that participants are protected) from the University of Stellenbosch and permission has been received to undertake this present study.

#### **6. PARTICIPATION AND WITHDRAWAL**

You can choose whether to be in this present study or not. If you volunteer to be in this present study, you may withdraw at any time without consequence to you of any sort. You may also refuse to answer any question of your choosing and remain in the research.

#### **7. IDENTIFICATION OF RESEARCHER AND PROMOTERS**

If you have any questions or concerns about the research, please feel free to contact:

**Researcher:** Jane Robertson 083 616 0434 [Jane@trainingpartners.co.za](mailto:Jane@trainingpartners.co.za)

**Supervisor:** Dr. Heidi le Sueur. [Heidi.LeSueur@usb.ac.za](mailto:Heidi.LeSueur@usb.ac.za)

#### **8. RIGHTS OF RESEARCH PARTICIPANTS**

You may withdraw your consent at any time and discontinue participation without penalty.

#### **SIGNATURE OF RESEARCH PARTICIPANT**

The information above was emailed to me by Jane Robertson. I was given the opportunity to ask questions and these questions were answered to my satisfaction.

I hereby consent, voluntarily, to participate in this present study. I also grant permission for the access of the relevant documentation referred to above. I have

been given a copy of this form via email.

---

**Name of Participant**

---

**Signature of Participant**

---

**Date**

**SIGNATURE OF RESEARCHER**

I declare that I explained the information given in this document to

---

The participant was encouraged and given ample time to ask me any questions.

Jane Robertson

**Name of Researcher**

---

**Signature of Researcher**

---

**Date**

## Phase Four letter of consent

Dear Participant

I am conducting research on transformative learning during Business-Driven Action Learning (BDAL), the research is about your individual/personal learning. It would be appreciated if you could agree to participate in the above-mentioned research. The results of this present study are to be used in a thesis, to fulfil the requirements towards a PhD degree at Stellenbosch University. In addition, this information may be used for educational purposes of professional presentations and/or to educational publications.

### 1. PURPOSE OF THE RESEARCH

The purpose of the research is to answer the question: “How, and if does individual transformative learning during a business-driven action learning management development programme take place?”

### 2. PROCEDURES

If you volunteer to participate in this present study, I would ask you to do the following:

The volunteers would be required to:

1. Read through FOUR short stories from participants who attended a previous management development programme like the one you attended.
2. Please answer the following questions:
3. How are the experiences in the FOUR stories similar and/or different to your experience of BDAL? Please explain the similarities and/or differences in detail.
  - a) What type of learning did you experience? Please chose first order, second order or third order change from Sterling’s model below. Please be as specific as possible. If you believe there was not change as a result of your BDAL experience please explain your answer.

Sterling’s (2010-2011) types of learning
First order change – effectiveness/efficiency, which can be labelled as doing things better.
Second order change – examining and changing assumptions, which can be labelled as doing better things.
Third order change – paradigm change, which can be labelled as seeing things differently and is hence transformative.

- b) Did you have any ‘aha moments’ during the BDAL experience? If so what were your ‘aha’ moments during BDAL Explain the events that led up to the ‘aha’ moment? Be as specific as possible.

### 3. POTENTIAL BENEFITS TO SUBJECTS AND/OR TO SOCIETY

This present study is intended for contribution to the educational experience of future participants on programmes applying the philosophy of BDAL. In addition, it will be

used to improve the practice of BDAL in management development programmes.

#### **4. CONFIDENTIALITY**

Any information obtained from this present study that has the potential of being linked back to you will remain confidential and will be disclosed only with your permission, or as required by law. Pseudonyms will be used to ensure confidentiality. Under no circumstance, whatsoever, will you be identified by name in the course of this present study, or in any publication thereof. Every effort will be made that all information provided by you will be treated as strictly confidential.

All data will be coded and securely stored, and will be used for professional purposes only. Only the researcher and supervisors will have access to the data.

This present study has received ethical clearance (to ensure that participants are protected) from the University of Stellenbosch and permission has been received to undertake this present study.

#### **5. PARTICIPATION AND WITHDRAWAL**

You can choose whether to be in this present study or not. If you volunteer to be in this present study, you may withdraw at any time without consequence to you of any sort. You may also refuse to answer any question of your choosing and remain in the research.

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If you have any questions or concerns about the research, please feel free to contact:

**Researcher:** Jane Robertson 083 616 0434 [Jane@trainingpartners.co.za](mailto:Jane@trainingpartners.co.za)

**Supervisor:** Dr. Heidi le Sueur. [Heidi.LeSueur@usb.ac.za](mailto:Heidi.LeSueur@usb.ac.za)

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#### **SIGNATURE OF RESEARCH PARTICIPANT**

The information above was emailed to me by Jane Robertson. I was given the opportunity to ask questions, and these questions were answered to my satisfaction.

I hereby consent, voluntarily, to participate in this present study. I also grant permission for the access of the relevant documentation referred to above. I have been given a copy of this form via email.

---

**Name of Participant**

---

**Signature of Participant**

---

**Date**

**SIGNATURE OF RESEARCHER**

I declare that I explained the information given in this document to \_\_\_\_\_.

The participant was encouraged and given ample time to ask me any questions.

Jane Robertson

**Name of Researcher**

\_\_\_\_\_

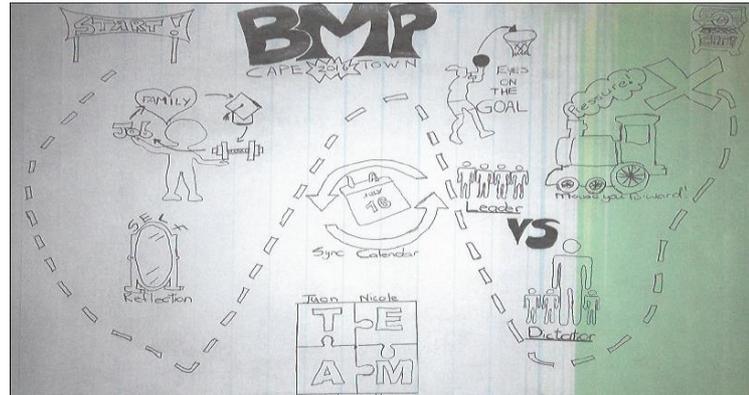
**Signature of Researcher**

\_\_\_\_\_

**Date**

## Appendix 5: Phase Two pilot drawings

These hand-drawn images were part of pilot testing in Phase Two data gathering.



① DON'T ASS-U-ME!  
(rather ASK?)

② DON'T PANIC!  
keep calm and carry on....

③ LEADER WITH NO TITLE  
Step up without being asked

**Aha!**

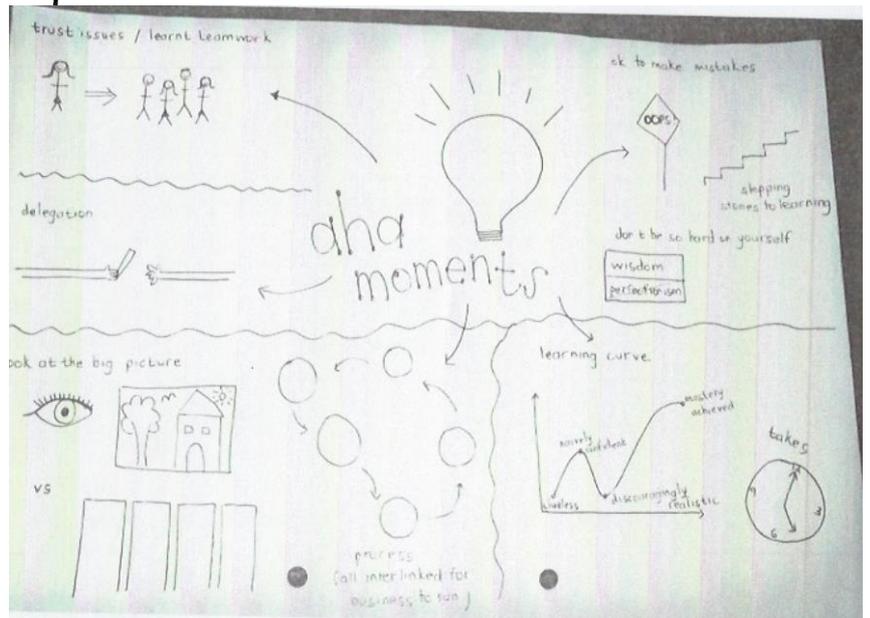
④ RESEARCH IS IMPORTANT

⑤ IT'S OK TO ASK FOR HELP!

HELP!!

COMMUNICATION IS KEY!  
Key!

⑥ STOP  
collaborate  
listen



Figures: Hand-drawn images from Phase Three

## **Appendix 6: Analysis: Locate the narrative process, scan for markers**

The stories told by the participant are located in the narrative processes of argumentation, augmentation and theorising. Labov's (1972) structure was applied so that the stories were differentiated from the surrounding text by boundaries (McCormack, 2004). The process below provides a beginning, middle and end. Examples from Nsikelelo's and Luke's scanning for markers:

### **1. Analysis of Nsikelelo's transcript to enable the writing of the interpretive story**

Beginning: Orientation - who, what, when and where

I would be thrilled to be a part of this (Via email)

Abstract – how the story begins, point of story

P: My learning is constant and I loved this programme. It was hectic. I was so into the programme that I got so sucked into it that it took me two weeks to notice my children left home. I got so into it I got sucked in and absorbed and it took so much time. It does take time to do that stuff, and I had not estimated that I loved it. When I came out of it and finished it, I thought, now what do I do with my days? There were TV programmes and series that I had missed and I realised how absolved I had been.

Action one – then what happened?

P: Spiral of focus here, as I am very passionate about something that I am interested in and this absorbed me and I would dive in and trying to coordinate with all of these different people was like herding cats. They all have their own enthusiasm levels and that spiral of focus was incredibly frustrating. Trying to move ahead when I wanted to move ahead instead of trying to work with a team of people who were passionate, but this was all at different times. One of the people, you could not speak to him on a Friday due to Mosque and other could not make Mondays as this is a big meeting day and that leaves as to Tue, Wed and Thursday. Timing was one thing; time zone was another. Their business as work goes on and priorities and then their personal lives as well and that to me was frustrating as it ramped it up.

We did not have a reciprocal when I was fired up and let's do this to now have an audience that was in the same space as me.

P: I have drawn the interpretation of houses you know when you say "my home." I have drawn a child's typical house. Some people from other parts of Africa in particular my BDAL team and their picture of a house are very different from my house. Then you get people who live in cities, so you have a complex. Then there is my little English house, which is not my house but it is what I would like. This is the whole perspective of what you want things to be versus what they are kind of thing. These are different based on experiences and the changing behaviour that I had is that I don't just give anymore. I don't just put out there now. I put out and then I get feedback and then I put out again and so it grows. That has been huge for me and my boss kept on saying that I need to talk to people. I can't just work on email and I never used to do that. Now I do because I know that I am going to get so much more than what I am putting out.

Action two – then what happened?

P: I do data mining and I love data, data, numbers and I love the stories they tell me. I sometimes forget that not everyone sees stuff like I do. The biggest thing for me was the limbic system; it resonated with me so much that I use it almost every single day – which is how we interact with situations, read situations, interpret what is going on in the environment and because at work I put together pictures for other people for what the numbers are telling me, and I think the numbers make sense. But talking to people, as opposed to just feeding information to people, you get so I want to use the word arrogant with my interpretation is the way the world is. It is only when you start talking to people about what those numbers mean that you realise this is wow! There is that perspective and another perspective, and this thing really resonates with me. The limbic system made me realise that there are so many perspectives based on your experiences and the way you interpret things and how you have been brought up and the layers within your brain. This was big for me; this was huge.

Action three – then what happened

P: we work well together and I respect his input; between the two of us, we rode over the others saying we would edit it. They said they were comfortable with it and others appreciated it as they knew their input would be listened to and they had to just think and contribute but not edit.

Resolution – what finally happened?

P: I can't say I am perfect, but I have certainly learnt a lot in the process.

Evaluation - why was the story told? Emotions/attitudes

P: The limbic system made me realise that there are so many perspectives based on your experiences and the way you interpret things and how you have been brought up and the layers within your brain, the was big for me, the was huge.

P: It was a nice grounding, but it was frustrating as hell because every time you wanted to go big pie, and then the people had to bring us back down, and it was always expanding and growing all the time.

Augmentation – additional comments to help with the plot

Argumentation – outside of the story

Theorising – why they behaved the way they did

P: individualist arrogance as I didn't need anyone to validate my thinking or anyone to broaden this concept or I don't need anyone.

P: That is where the arrogance comes from. I just presumed that everyone just saw what I saw and that is not the case and sometimes I need to state the obvious. I enjoy him and he pushes me which is not comfortable and it takes me back to the BDAL as I felt out of my depth in something. This is an uncomfortable place to be as I was always the one in control, as I had been in the business for so long. If I had to be in a new industry, I probably would not survive as I would go insane with self-criticism.

Coda – what does this mean and brings the story to a close

P: We are always changing and you are always changing. I kind of hope I am always changing through any experience, with a huge thing like this, which was massive in a way. I probably would not be as arrogant as I was; it was humbling in a way to realise how much I don't know and being open to others' experiences through academic experiences was big. I have done a lot more reading, and my reading style has changed and the stuff I am reading has changed as I am reading more help books, not just stories for escapism, but stories for learning. I used to read for my heart and now I read for my brain. I send out a quote for the day and now the content of my quote for the day is very different. My stuff is more thought provoking than it used to be. I used to pull at heartstrings and now they tease the mind.

Aha moment: Limbic system, houses

Language: Masterpiece, used the word arrogant multiple times, individualist arrogance.

### **Story preparation**

List of story titles and points in the transcript = evaluation (why the story was told)

The number in brackets represents the line number in the transcript.

- I got so into it I got sucked in and absorbed (2) (14)
- I sometimes forget that not everyone sees stuff like I do (4) (5) (8) (10) (picture of houses) (43)
- It was expanding and growing (12)
- I had to let go of being in control (16) (45) (49)
- Respect the fact that there were other voices (18) (22)
- I am quite resistant to change (24) (26)
- It was humbling (30) (37) (39) (41)
- Action coach revised my thinking (49) (51)
- It is so easy to go back to default (53)
- We were very blessed (57) (59) (60) (63)
- Deep perspective (65)

## **2. Analysis of Luke's transcript to enable the writing of the interpretive story: Luke**

### **Scanning for markers: Shaping the stories**

Beginning: Orientation - who, what, when and where

J: Why did you volunteer to be part of this present study

P: I am curious about your research and how you are doing it, and I thought to myself: I need this experience and I have the opportunity to share it, and I want to help with something novel and new and why not, as I would like to help contribute.

J: why did you attend SMDP

P: I had to fight to be here, I was nominated by my manager as I asked to be nominated

J: Why

P: I had seen my colleague go on the programme on the previous year and we talked about it and he explained the types of things he was learning, and I did a little bit of research on the web site. I was like wow! I like the really broad programme as it spoke about fundamental things that are important for senior managers. I thought that I could learn a lot, and this is what I can do with it and now I have finished and have a whole lot of questions, and this is not what I thought was going to happen.

J: What did you think you would learn?

P: I thought it would be more tips techniques and process and very technical but actually really enjoyed the fact that it was much high level and abstract. I really really enjoyed that aspect as it meant that a lot of the discussions with facilitators were wondering, which was really nice as you could explore different aspects of the domain that they were talking about.

Abstract – how the story begins, point of story

P: That is one of the things I said I have a lot of questions and can't actually put them down I don't know what they are

J: I think you need a big question mark on your picture

P: Ja True very very true the thing with BDAL it is not the BDAL that makes

me ask the questions, but BDAL was sort of: how do we apply this stuff that we have learnt? But the entire programme created all these questions, and it is this feeling of, you know what, I like the feeling, this uncomfortable, you are not sure what is going on but you know something big has happened and you need to figure out what it is and how do you move forward and what is the next step.

Description – people and place to get the whole picture

P: I think that the one thing that I really did learn is just how attuned to justice I am, unfortunately. Had a bad experience from BDAL from a team point of view in that a lot of the team members were not pulling their weight and because of that, I got very very upset. I think that is normal for most people, but when other people are not pulling their weight, they get upset, but I think that I don't know. I also realised that I don't sometimes address issues directly, which is a bit of a weakness. That is something that I need to and I think that I have also grown since the BDAL in that I much more inclined to speak to somebody about something that I am unhappy about than during the BDAL, although I did address it with people in the team and ja, that didn't go too well.

Action – then what happened?

P: I blurted it out and I said that that nobody else has done anything and that was when the rest of the team decided to pitch in and say that we had not been communicating very clearly and all this kind of stuff. I thought to myself, you know what I mean, we have talked about and put together the team charter and all this kind of stuff, and these are the repercussions of not pulling your weight. We had been communicating and people just stick their heads in the sand, so that was one of my personal learning's.

Action – then what happened?

J: Can you give me some examples where you challenged yourself?

P: Confronted the people was a huge challenge as I avoid confrontation at all costs; normally so that is why it was something I had to learn, um trying to think the diverging and converging thing was difficult for me

J: Let's talk about that

P: It was very difficult for me as I tend to be very detail orientated from the get go. I am an analytical type person; that is why I am like that, but forcing myself to take a high level view. So at one point in the BDLA, I took what we had and created an outline and just like bullet points; these are things and by zooming out like that, I was able to restructure what we had to make a bit more sense and um, that was difficult for me. It was quite difficult um, but I see the value in doing it now um and that iterative diverging converging can really really narrow down how you look at things.

J: You mention diverging and converging in your picture.

P: Exactly

J: You need to do that in the BDAL as it is a skill set.

P: Definitely and that why doing the BDAL in a team is so important as I am an analytical person. I am going to have one way of doing things and another person will look at the big picture all the time and having those two viewpoints is very important.

Resolution – what finally happened?

J: How does this link to the workplace?

P: I have come to realise that we need to work as a team. In order for us to deliver on what we need to deliver, we need to work best as a team and sort that issues out, whatever they may be, So that is kind of what I have started to do, and I can't say I am perfect, but I have certainly learnt a lot in the process.

Evaluation - why was the story told? Emotions/attitudes

J: What picture would you draw to describe that learning?

P: I would probably – this sounds cheesy.

P: I would probably draw a circle of people trying to pull tighter and trying to get the team to pull together towards a common goal, and I think that we may have been wrong in the way that we communicated, and so better communication would be good, group of people talking about issues is what I would draw.

J: Tell me about your feelings.

P: In the beginning, it was a feeling of excitement and a mountain was ahead

of us, and we were not sure how we were going to tackle it. But it was still exciting; then further in, you hit the doldrums, and you feel overwhelmed like you are never going to get through this. There were points of anger, which has to be expected; towards the end, relief and accomplishment and especially the whole team, felt accomplished; that was meaningful and that we had contributed something that was nice.

J: How do you feel about your BDAL experience sitting here today as you have had time to reflect on yourself and your learning and make any changes?

P: When you are in the experience, it is hard to see what a gift it is and one of the things I am hugely grateful for the opportunity. That sense of accomplishment will never fade. I have spoken to 5/6 people who all speak fondly of the experience, and every single one of them said they hated the group experience, but it is a fundamental part of it and shaped the way you look at certain things even now.

Augmentation – additional comments to help with the plot

P: I think the people underestimate the process. I really think that they underestimate the process. I think that I would say something like “it is harder than you think” or something along the lines of “watch out it will bit you in the end” or something of that sort

J: When you mean the *process*, you mean the BDAL process?

P: Yes

J: Do you mean working with other people that you found it hard or the group or the actual learning or yourself? which part did you find hard?

P: I think the whole part. I think within the team context, you need to make sure that everybody is going at a consistent pace and then also you as yourself, that you are dedicating some time every single day, even if it is just an hour, just to get down and do some research, put together some for an interview. Also what we did wrong is that we had these fits and starts, and if we had a more consistent pace, we would not have been so burnt out. If we had prepared a little bit more, I think our research topic would have a lot more quality and that is my thought.

## Argumentation – outside of the story

P: I am not sure if everyone realised the importance of reflection in the morning to answer questions, and to a lot of people this was a chore... if you think about you start to gain real insight into the things you have been learning without asking those questions, maybe you will figure it out and maybe you won't.

J: Emphasising the importance of reflection in learning

P: Definitely

P: Three months ago, I started a new thing as I have put together a morning routine where I reflect on my behaviour and if I have been thinking about something for the last day and I have not done anything about it, I add it to my to do list.

J: What did your LPF do to help or hinder the group? – what activities

P: I had a discussion with - before one of the feedback sessions, and I told him I was unhappy. He encouraged me to address the situation. He said, "speak to the team and make sure they understand where you are coming from." He asked the right questions, went through the programme with the guidance that you need. I said to the group that - has guided us through this entire process, and I don't think it would be possible without an LPF be it - or who ever - is really great at what he does, but that role is so important as it creates consistency as someone is there though the entire programme. If you don't have that touch stone, it would feel that you were being thrown around; this person is always there.

## Theorising – why they behaved like they did

P: We were so concentrated on getting the work done that we were very often not able to lift ourselves out of the weeds, to look at it more broadly, some of the stuff.

J: Did you engage each other in the group?

P: definitely a possibility as disengagement from the beginning as they felt forced to be there. Some of the people felt that they could not do the work as they didn't have the skills necessary or the ability to do what we needed to do. It was easier to delegate it to someone else not delegate but let someone else

deal with it. The subdivision of work was very difficult because you have to bring all the work back together at some time – once again theme of diverging and converging. We used goggle docs and commented on other people's work as there was a core contributor with comments, and that was a miscommunication as we did every section with minimal effort.

Coda – what does this mean and brings the story to a close

J: Have you changed your beliefs and behaviours in any way?

P: With my colleagues it has changes the way I have dealt with them, with my team.. I think... not sure...not sure if I have changed enough yet in this point in time .. I have been going through a coaching process at the moment and I have learnt a whole bunch of stuff about myself that I have now changed um. I spoke to my manager and said um I would like to sort of crystallise what I have learnt and give myself the space to do that and I would like some coaching on what paths I can develop within my work

P: One of the things that I have tried to identify my purpose, sounds cheesy, but I like cheesy. It is important that you understand what you are trying to achieve with the time that you have and not just flit through life as a high level thing, why I am in this job, why am I with this company, um and what value am I providing, from a marketing I never want to do marketing but everyone of the things that really resonated with me was about value that you provide to the client and the perceived value that they get and it does not necessarily need to be real value it is about what they perceive and um that something I am trying what value are we providing to our company as a team what value am I providing to the company as a person in my individual role and how can I get better and how can I help my manager make the entire department better.

J: Has anybody at work or your personal told you that they can see a change in behaviour since BDAL

P: My wife has told me that I ask too many questions my boss has said that he seen that I am asking different types of questions and also taking the initiative in more strategic areas and I think this is because strategy is not that scary for me anyone it is just a way of looking at things long term I look at it more that way and I am more involved with team members.

Aha moment:

- I just blurted it out (6)
- It was at that point in time (96)

Coda: Reflect on my behaviour and ask questions.

### **Story preparation**

List of story titles and points in the transcript = evaluation (why the story was told).

The number in brackets represents the line number in the transcript.

- When you are in the experience it is hard to see what a gift it is (82)(16)
- It was a huge amount of anxiety (77) (80)
- We were not able to lift ourselves out of the weeds (39) (104) The power of diverging and converging (picture) Unlearn – you can't leave things to the last minute (29)
- I don't sometimes address issues directly which is a bit of a weakness (4) (59) (90) (41) (102) (107) (111)
- Crystallise what I have learnt (49) (43)(53)

## **Appendix 7: Peer reviewer one**

The first peer reviewer worked with the researcher in identifying McCormack's (2000a) lenses in the transcripts to enable the writing of interpretive stories.

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### **Peer Review for PhD Student**

Jane Robertson is currently completing a PhD degree at Stellenbosch University, Department of Business Management, Faculty of Economics and Management. She approached me to assist her with a peer review of interpretive stories that were written based on hand-drawn images and an in-depth interview.

I am an executive coach with over twenty-seven years of experience in the field of leadership development and training. In 2013, I qualified as a Professional Consciousness Coach and went on to gain accreditation as an Associate Certified Coach with the International Coaching Federation (ICF).

Jane approached me for assistance due to my coaching background and experience. I was able to assist her with the analysis phases of the research, especially regarding the interpretation and nuances of the language used by participants during their interviews, and how this impacted on their stories.

We followed a structured process for the analysis. Jane sent me six transcripts by email. I read through each transcript several times and made notes of the context, moments and language especially regarding contradictions and emphasis of the participants. I was not given any background information regarding the participant interviewed as this may have influenced my perception of the content of the transcripts.

Following my review of each of the six transcripts, I met with Jane twice to discuss the context, language and moments according to McCormack's lenses (2000a). We compared her findings with my own in order to establish the relevant research findings.

Kind regards

Colin Koen

## Appendix 8: Summary of each interpretive story and full interpretive stories

Interpretive stories are about the participant's experiences and events during the BDAL. The direct words of the participants are written in bold. The researcher's interpretation is written in normal font. The researcher's interpretation is the analysis of the transcript, using McCormack's (2000a) lenses. At the end of each interpretive story is a summary in the form of an epilogue. However, an additional summary of each interpretive stories is included in the table below.

Table: Summary of each interpretive story

Participant	Summary of each story written by the researcher
Prisha	Having to tell the researcher her story was an opportunity to cement her learning through reflection, as she indicated that she might not have spent time previously thinking about her learning. For example, she appreciated the benefit behind questioning. In addition, she reflected on the BDAL and drew parallels between what happened on the BDAL and her work life. When she said, "if only I had lifted my head", this indicated reflection. Her story shows evidence of awareness around her learning and understanding others people's issues. She learnt not to be controlling of other people in the syndicate team and back in the workplace. She further comments on the realisation of her impact on others and understanding other people's perspectives. She uses the words "biggest take- away" and "big learning" to emphasise what she has taken from the experience. The wording "I would like to think that" reinforces her self-belief that she has changed. Prisha displayed change in her personal space as well as her working environment during and after the Senior Management Development Programme. This is supported by the narrative highlighting her promotion to a new role after completing the SMDP. Prisha mentions that she needed to learn different ways of thinking as an additional learning from the programme as this was essential to the successful completion of the programme. Lastly, she highlights the application of the skills gained throughout the SMDP has proven invaluable in her workplace, indicative of her learning

	being practised and continuing after the programme.
Fatima	Fatima shows evidence of being aware of her own strengths and capitalising on them. She shows that she understood why she was so hard on herself. She practises self- reflection in the story by asking questions and keeping a journal. She indicates that she no longer puts pressure on herself to please others. Her transformation goes beyond the BDAL into her home and work life as the experience boosted her confidence and self-awareness. The transformation comes across as being permanent as there is evidence in her daily life.
Julian	Julian acknowledged the areas that he has developed in – namely, collaboration and influencing others. Julian understood the need for collaboration and was aware of the qualities he needed to work on and action. He was able to extract the initiatives from BDAL and attempted to apply these initiatives back at work, indicating a change in his behaviour. The fact that he has reflected and applied self-assessment points to deep learning. Julian has clearly indicated that he has taken the learning into other areas of his life as he mentions day-to-day life, home, personal and work life and that even if the outcome was not to his liking, he is still motivated to continue his learning. He has also realised that he cannot control every situation in the workplace and that he has changed his thinking regarding how aspects are managed. He mentions that he has not been successful all the time and that he is still growing. There is evidence of being conscious of changes he still needs to make. He is aware of his shortcomings and is consciously working on the areas that can still create a change in behaviour. This repetitive behaviour will ensure that there is relative stability in his application of learning.
Mbali	Mbali's story is one of self-exploration and 'aha moments' that seem to be triggered by emotions. She realised that she could manage herself if she stopped and was mindful. She was able to do so as she was open to learning. There is evidence of deep learning linked to the strong emotions she experienced and wanting to see a change herself. From Mbali's comments it seems evident that the people around her see transformation. Her team back at work and her colleagues recognise a change in her behaviour. She feels that back at work her relationships have improved. She also indicated that she experienced a deep

	<p>emotional impact during the BDAL, which has transformed her. The BDAL seems to have helped her recognise and move forward from her traumatic pasts. She has improved her work relationships and teamwork. She gave examples of where she is more open minded, more empathetic and compassionate. She also gives examples of how willing and able she is to share her knowledge and experience. She is self-aware and it does seem as if this impact will be long lasting.</p>
Luke	<p>Luke's narrative indicated that he likes a challenge; he comes across as being enthusiastic and wanting to collaborate, indicating that he was keen to develop. During the BDAL, he realised that he needed to take a step back and not over-analyse a situation. He also realised that his need to ensure fairness frustrated him. Throughout the journey of the BDAL, he shows vulnerability and authenticity. He is aware of his shortcomings such as not being able to see the bigger picture. He understood that he needed to see the detail and the strategic viewpoint. He specified that he does not like confrontation or asking questions and that he struggled with this, but through working on this with the action learning coach he began to build up courage and believe in himself. He received validation from his line manager, who encouraged his development. The story speaks about him changing back in the work place and then continuing to change by being coached to improve further. The fact that he worked with a coach after the programme indicates that he recognised that he still has room for growth and that he is keen to develop and change. He is looking towards the future not only his day-to-day interactions. His story indicates that he is capable of reflection and is able to create learning opportunities for himself. Taking his learning and putting it into action, Luke realised that team diversity is a strength, thereby giving breadth to his transformation. He demonstrated self-reflection throughout the journey, which resulted in deep learning. The impact for Luke was deep as was evident in his behaviour.</p>
Sandy	<p>Sandy reflected and recognised that her level of education was a blocking factor for her and she was willing to change this by attending the programme. In her story, she used words such as <i>wow</i> and <i>amazing</i>, which indicates meaningful engagement with the BDAL experience and self-realisation. Back at work, she has started to engage</p>

	<p>more with and interact with people in the business, including those who are well qualified showing that she has addressed the block that she had regarding herself. She has also acknowledged the different perspectives back at work that have influenced her viewpoint. The experience has improved her self-confidence. This took place as she interacted with people and she explored more and made more contact. She also started reflecting by writing her thoughts down. She has applied her learning in the business, work group and BDAL group. The changes that Sandy has made have influenced her outlook on life. She shows evidence of stepping out her comfort zone and collaborating with others. In addition, she is more conscious of her behaviour. She is continuing to apply what she has learnt and now reads to understand and further her development.</p>
Carmen	<p>Through the BDAL process, Carmen was challenged to a point where she assessed how she reacted and felt while working in a BDAL group. She shows evidence of recognising her emotions when an outcome she does not find favourable has taken place. The way she thinks and responded to a stressful situation has taken her out of her comfort zone, but she does not indicate how she has managed this since completing the BDAL. Carmen confirmed that she struggled with believing in herself. She mentions “boundaries” in her story and there is some evidence of change in her personal and work life in managing boundaries. She has started writing in a journal, which will help her to believe in herself. Carmen is aware of what and how to be effective but still feels fear, which is revealed in the inconsistency of application of learning. This is shown in her concern about “being liked” back at the workplace, which is also what she struggled with while working in the BDAL group. However, she is aware of the cause of her struggle and she has tried to take meaningful action to deal with it, which is still prevalent in the present, which was indicted in her comments regarding being liked. There is limited evidence of lasting changes in her behaviour.</p>
Nsikelelo	<p>Nsikelelo displayed a very determined individual who saw herself as passionate and astute. Her first challenge was overcoming the obstacles that set members come from different backgrounds and have different viewpoints and hence ideologies. She understood this and began to</p>

	<p>understand the value of teamwork and collaboration. Even though she experienced frustration, she recognised the feeling and through introspection recognised her role in causing the frustration. Self-awareness and adaptability are themes in her transformation. Comments such as “I got sucked in and absorbed”, “soul-altering”, “it resonated with me” indicate that she experienced a deep change that altered her core. Almost every single paragraph describes some form of self-reflection and a willingness to immerse herself in the learning. Comments like “She tried to understand why others ...”, “My interpretation ...”, “I just presumed ...”, “Arrogant”, “multiple voices which were not aligned with mine.” All these, and many more, indicate that she was really trying to understand her own and others’ frame of reference and mental models – again an indication of deep learning from an individual perspective. There is also evidence to suggest that she has made this transformation in many different contexts, initially changing the way she interacts with her BDAL team where she now respects the different perspectives and constantly asks for clarity. This change in behaviour is also noted in the way she presents and interprets data back at work, where she now talks to people to gain their perspective instead of just feeding them information.</p>
Louie	<p>Louie indicated that she had mixed emotions during the experience, however as she progressed she let go of control which resulted in her feeling more positive and certain of herself and others. She challenged her own assumptions and she looked for understanding instead of making assumptions. This helped her manage her own frustration and gave her confidence to approach staff back at work. She also shows evidence of looking after her health and spirituality. Louie showed that she is able to assess the situation and take the next step back at work and her personal life. She gave examples of interacting more on a human level. The story suggests that she found her purpose and that others in her life have indicated that they have seen a change in her. There is evidence of her growing in confidence that she has maintained back at work.</p>
Sally	<p>Sally started with a negative perception towards the programme, which is evident from the words that she used in her story. She was afraid of being vulnerable and admitting her shortcomings. She talks about being</p>

	<p>a “last-minute” person; however, there is little evidence that she has changed her behaviour in this regard. She is aware of this behaviour but has not shown how she has changed. When the team chose Sally as the team leader this boosted her self-confidence and she mentions that she has stopped doubting herself back at work. This self-confidence back at work is indicated in the fact that she has delegated some of her responsibilities. Later on, she accepted that the BDAL required her commitment and her turning point was influenced by her realising her potential. She started to adapt and progress while still working on her mental model regarding group work. During the BDAL, she showed that she was able to accept, acknowledge and learn from others’ ideas. The result was that through collaboration with the team, she was able to transform her thinking. Her story showed evidence that she changed as an individual and in that process, she has influenced her work team.</p>
Logan	<p>Logan clearly reflected and talks about how this influenced him as a leader and the changes that he had to make. He mentions team members’ contribution and the “talking stick” method, which are indications of surface learning. He also incorporates strategic thinking concepts into his story, which is an indication that he is trying to be professional and showing that he understood the concepts from the experience, however he has not explored this concept back at work. Another indication of surface learning is the use of Kolb personality styles in his panel interviews. There is also some evidence of deep learning as he shared stories of how he managed conflict back at work, where he has made himself available for projects, demonstrating confidence in his own abilities. He is also more comfortable in a team environment and strongly believes in giving back to CSI. He showed signs of self-development in the way he engaged with the group. The way in which he interacted with the team by keeping quiet showed evidence of collaboration. He also set growth plans in action whereby he learns from other managers in order to become a better leader. There is a sense that he still lacks confidence and seems post BDAL, which is evident in his comment “to see if he mastered the right thing.” He is still uncertain of himself and questions whether he is making an impact and is unsure of his personal learning.</p>

Charmaine	<p>The change from an individualist person to a team player was gradual. The experience enabled Charmaine to be more open to challenges in the workplace. She gave examples of work and home. She improved skills such as diverging and converging (systems thinking and the ripple effect of systems). She emphasised the importance of team collaboration and the importance of adapting to others. She emphasised that time management was important.</p>
Odwa	<p>Odwa shows evidence of self-awareness and has applied this in multiple situations. She has experienced realisation and deep understanding of various topics both at home and at work. She has realised that she needs to be the catalyst for change, for example her divorce and giving her son guidance. This shows deep change in her focus on setting boundaries. In her work role, she understands that she needs to gain input from different stakeholders and collaborate with other departments to ensure that the best decisions are made and she needs to set specific boundaries to manage her time and availability, showing breadth in her transformation. There is also evidence of confidence in her own abilities. It appears that her mental model has been changed, indicating that she is focusing on personal mastery. She has a renewed focus on her purpose, which is evident in her decision-making. These changes indicate that she practises and abilities her newfound abilities in her daily life. There is a renewed sense of perspective.</p>
Mark	<p>Mark was enthusiastic about the programme and had a willingness to learn and improve himself as a person and the way he worked. Through challenges during BDAL, he learned to drop his guard and listen to others. His ability to become more self-aware made him more comfortable in his own ignorance but also easy to apply new learning. The experience was meaningful to him as he found himself in a better position at the workplace and was able to accommodate other people and see things from their perspective. He unlearned and relearned new concepts that he practised in the workplace and home. The result is that he has made a significant change in starting his own business. In terms of breadth, he mentioned his family, and emphasised that he is more socially aware and tolerant and has given an example of optimising the value chain at the workplace.</p>

Sam	Sam shared the benefits of working in a diverse team with different backgrounds and different demographics. The team had a clear objective that all members understood. What made his team strong were the ground rules that were set. Sam shows evidence of opening up and perhaps being more tolerant of others. His story was about his interaction with others and he gives examples of how he has communicated more effectively back at work. He indicated that there was an improved understanding of people. He now talks more at work, as he feels more confident in himself.
Rhys	It appears that there were significant changes to Rhys' life. This was demonstrated in the change in his perceptions of others. Initially he thought introverted people were not contributing. He has become more patient, allows others to process information and gives them time to respond. He changed his thinking around solutions, in that they are not only black and white but also multi-faceted. He also changed his behaviour in considering a response before talking. Rhys' perspective broadened and he realised that there was so much more to be experienced in his life. He developed emotionally from his BDAL experience. This emotional development was evident in aspects in his home and work life. He talks about visiting another country and changing his home life thus giving his story breadth. The story tells about him getting emotional, which suggests that his visit to America influenced his life. It is also emphasised that a career change is a consideration, implying that he is thinking about life-changing choices.

The full interpretive story for each of the 16 participants is written out in the next section.

### **Prisha's narrative: Putting the team before yourself and understanding others' views**

Prisha asked to attend the SMDP programme as she was looking for opportunities for further development. Initially, her manager was hesitant to send her on the programme as she had only worked for the company for two years. There was another person in her department who had requested to go on the programme. Her manager nominated both to attend the programme and she was the one who was later on selected. It made her feel uneasy as she was selected above the other person and she questioned whether she deserved to be selected at the expense of the other person. However, her

manager saw the potential and value in her attending the programme. Since attending the SMDP, Prisha has been promoted to a new role.

Prisha scheduled time in her calendar a month before the interview, as she knew that she needed to start thinking about her picture. Then she scheduled time again in her calendar for two days before it needed to be submitted. She felt annoyed that she had to take time to put her ideas into a picture but then she realised she could express herself better in a picture. She wanted to have a systematic flow, and include the causes and results, hence the headings: Cause, 'aha moments' and results.

Things spiralled out of control at the beginning of the year for Prisha. While she was drawing, she had to re-live last year. ***Just like re-live everything from start to end and then actually kind of made the picture clearer.*** She tried to come to one conclusion. However, she felt this was not possible as there was not one conclusion as the learning was so diverse and she has not finished her learning journey.

She was planning on drawing a rough sketch and then adding in the colour but the sketch became the drawing that she sent to me as it displayed her journey fully. ***You can't re-do the past.***

The biggest benefit of drawing the pictures was reflecting on everything that she went through last year and understanding the outcomes at the end of it. ***I mean you lose it so easily if you don't practice things. You walk out of the programme and then tomorrow you're back in your same ways. So, I want to say that I probably had an added benefit by thinking again about things. Actually, reliving the moments again is the key.*** The drawing had the benefit of creating a **reflection period to reinforce the learning.**

She identified a variety of causes, as there was not one specific thing that she could say was the cause for her change. ***I want to say it was a specific event. I want to pinpoint it to a specific event but I really can't pinpoint it. It just happened over time. Gradually over time.*** Her main challenge was that she **wanted control over everything during the programme.** The flexibility in the BDAL process made her feel uneasy and she was not sure on the appropriate steps to take. She has drawn little tornadoes to represent her feelings at the beginning of the programme.



Figure: Tornadoes

At the beginning of the programme she felt that everything was spiralling out of control for her, as she ***had work to get through, I'm working like a maniac over here.*** During the year she had a third-year trainee placed into her team. ***I had this whole list of things that I gave the third-year trainee. You need to do this, this and this. And this is the due date. I would constantly check up on him. Is he doing this, is he? And during that entire process I just realised you know I need to let it go. I can't have control over every aspect because I'm also limiting other people's growth with all this control that I'm trying to have. It also limited me to see the bigger picture, which I can see now. Because you're so stuck in the detail, you need to step back.*** Letting go of controlling the day-to-day details and looking at the strategy was a key learning for her. The programme added extra pressure in her day from a time perspective. She realised that her role at work was to implement the strategy rather than focus on day-to-day operational elements.

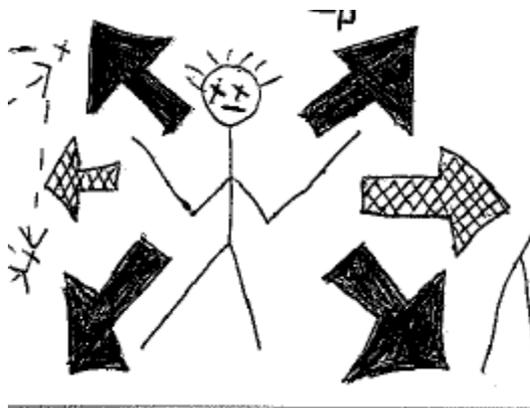


Figure: Pulled in all directions

The little stick person being pulled in all directions represents her confusion. The confusion endured the entire programme.

During the second part of the programme, each group member, including herself, struggled with personal issues. She was in hospital; someone else had pneumonia and a team member's father passed away. **Every part of the year there was someone that was out of the loop. But also understanding why those people were out of the loop and respecting their time. Having someone else carry the weight. I think that was the biggest thing. Also letting go and then trusting that there's always going to be someone that can pick it up.** This was one of the catalysts for her. When she got back to work, she realised she did not want to be trapped in the same cycle as the previous year, controlling the people in her work team.

The picture below shows Prisha's full hand drawing.

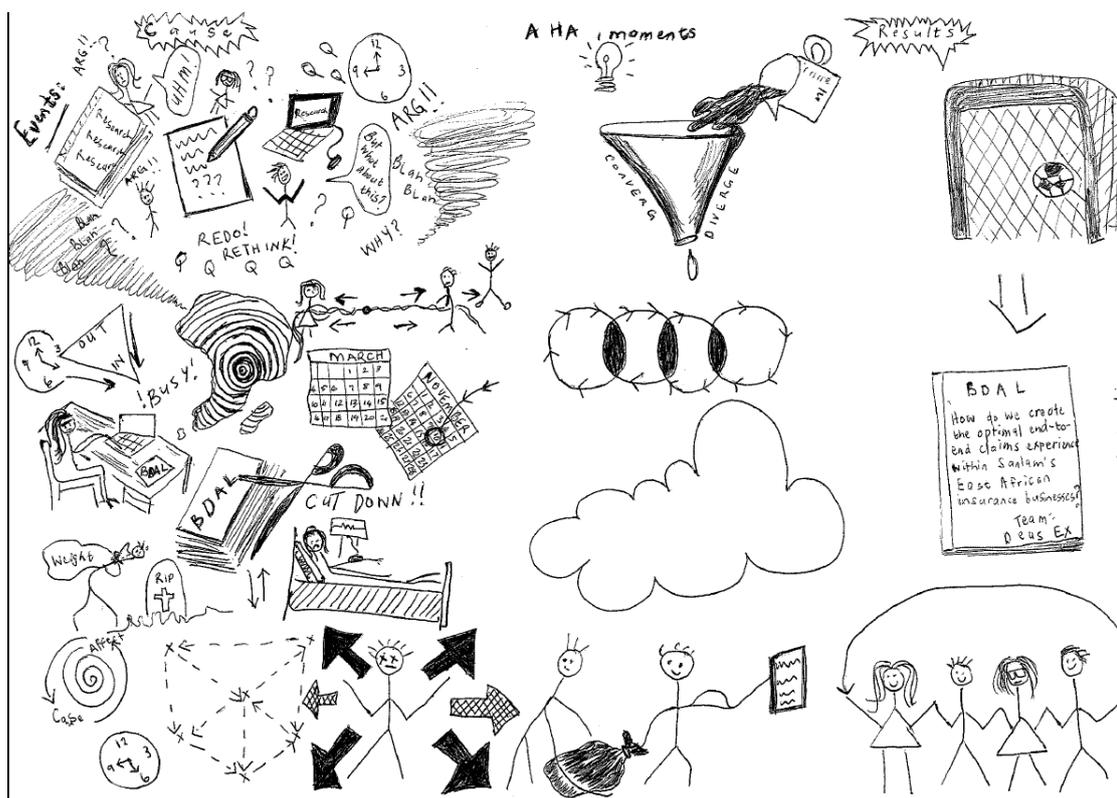


Figure: Full drawing

**The BDAL was a nightmare. I wanted to do the thing, I wanted to get in. We tried to implement a structure but there wasn't really a structure going on. I would get so frustrated with everyone.** While the group was struggling to come to terms with the business problem and the constant questioning, it felt to Prisha that they were wasting time. This would add to the pressure of her job's workload. **I've got work to do, these people are wasting my time. I need to move on.**

***During the BDAL process we asked a lot of questions. We truly questioned everything. Re-do, re-think, why, why, why? For me it felt uncomfortable constantly questioning.*** Ultimately, the constant questioning of the topic helped all team members to understand the problem. ***If we didn't go through all that questioning, each one's interpretation would have been totally different. Only in hindsight, you can say, oh okay, it was good to raise all those questions and constantly ask those questions.***

The questioning helped the team understand the topic in more detail. In addition, it helped each member of the team understand each other. ***All of us were from different walks of life. It is about truly understanding where the other person is coming from, why the person is asking the question. By that person asking the question raised a new question, you see things differently. You see things differently from that person's perspective.*** She called this a “questioning mind.” The questioning mind helped her see different perspectives. It helped her realise that there was no right or wrong and it is how you perceive everything around you. She became aware that it was how questions were asked that gave the answer. ***I mean the biggest take away from the BDAL team, was actually the different perspectives from everyone and how, especially how everyone can actually contribute to one thing.***

She has learnt to think from the perspective of other people and appreciate their viewpoints. ***I want to think that different perspectives have taught me patience. I have a new higher tolerance level of other individuals and I'm really more patient.*** During the previous year, she had to cope with understanding the mind-set of millennials in her team. At the same time she needed to self-reflect and understand her tolerance and stress levels. She was inclined to become stressed quickly.

The team spent a lot of time in meetings, which slowed their progress. ***People are talking all around me but we're not really defining what we should be doing.*** The picture below shows that group members spent time questioning which resulted in the group reworking and re-thinking the data.



Figure: Questioning

*I've got all these little people here and everybody's questioning things.*

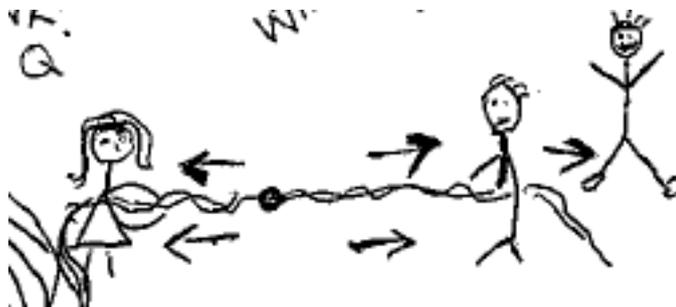


Figure: Tug of war

*I even have here two little figures; it's like a little tug of war. The one's pulling this way, other one's pulling it this way, and the other one's rooting for the one person. I guess in this first part over here with all this busy-ness and this confusion, this person just looks purely confused at that point in time.*

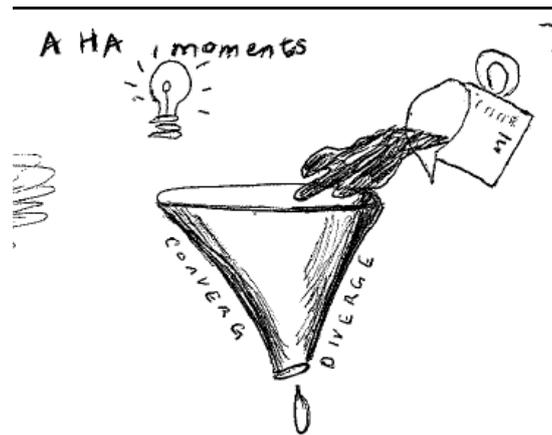


Figure: Aha moment

An 'aha moment' took place during the redefining of the BDAL problem. The group was working through the data using divergent and convergent thinking. ***I had to learn different ways of thinking. I had to learn the diverging. I do not take steps back, trying to understand the bigger picture, trying to see what the next five steps are going to be. This was actually the difficult part. You can't know everything but you should know what your audience would want to know. And then that, that gives you direction into what detail you need to look at. So that was in itself the biggest 'aha moment'. I can see the big picture now.*** This relates to her work situation where she needed to let go of control and give trust to her staff. She needed to take a step back and look at the bigger picture. She became aware that she did not have the capacity to look at all the detail.

The second 'aha moment' was when she understood that everything is inter-related. She demonstrated this in her drawing by drawing circles.

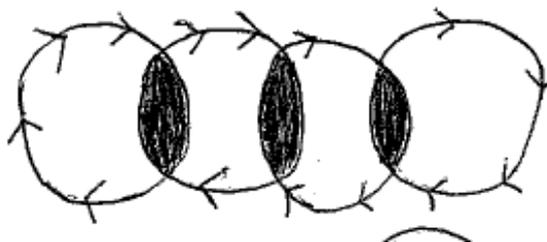


Figure: Circles

Her new understanding was that once a decision is made, it has a ripple effect in other areas. ***That with one thing you do is going to affect something else and overlap***

*each other. It's just understanding people's different perspectives. This was a big learning.*

*How everything actually inter-relates, loops over each other and that you can actually leverage from other people.*



Figure: Cloud

She drew a little cloud as her further 'aha moment' which represented the role of data during research. *You can be so stuck in the detail, constantly, and if you don't interpret it correctly, how can you make a decision? For me that was personally you know a big thing. In my old job, if I had just lifted my head up, just looked up I could have understood more. I do this regularly now in my new job. Now, I am a lot more conscious of time. I'm a lot more conscious of other people's time.* In the beginning, she was always worried about her own time and did not think of the other person's time.



Figure: Sitting at a desk

*You will see I'm sitting here at my desk, typing away. I've got time pressures here, deadlines are going on and when the team gets tighter there were times that everybody would just talk, talk, talk. And I'd whip out my laptop and start typing away and I'm thinking, guys you are so wasting my time right now. I wouldn't say it to them but you know, I would sit there and they would talk and I'll give input here and there.* She realised it is not just her time, but other people's time and that they have goals they have to achieve. During the programme, she was in hospital and she managed herself and her time to still achieve the goals that she set for herself from a personal, learning and work perspective.

A central question infused her biggest learning: *How can you allow for change if you're not yourself willing to change? Carrying each other. Reaching a common goal, standing together. It's all different perspectives of people and fully questioning all the time. At the end, only by questioning everything we could really stand on the same spot. If I didn't go through this process I wouldn't have thought about it in so much detail to try and understand it. That's my biggest learning.*

Since attending the SMDP, she is now in a new job. **My biggest change that I had to go through was actually really sit down and think of what do I like? And what do I don't like about my job? It's like what can I tolerate about the job? And what can I really not stomach? And in the end when I had to finally, finally make the decision, say yes I'm leaving.**

### Epilogue

Prisha's need for control and structure demonstrates how difficult she found it working in a group of peers who all have their own viewpoints. Prisha's learning was to respect other people as she realised that she needed to take their time and perspectives into consideration. She has transferred this learning into her workplace and shared examples where she has applied the learning for example by not always getting stuck in the detail, allowing herself to be confused and being more comfortable with the ambiguity that she experiences at work. "The extent of transfer of learning depends on the degree to which changes in knowledge, insight, understanding, meaning, attitudes, competencies and/or behaviours are applied by the participant outside of the programme" (O'Neil, 2007, p. 131).

Prisha has learnt to deal with the complexity of work by reflecting and questioning herself, the team, and the data and this has proven to be invaluable to her in her workplace. This insight can be described as transformative learning according to

Mezirow (1990), whereby the process of learning takes place through critical self-reflection, which results in the reformulation (or transformation) of a meaning perspective.

### **Fatima's narrative: Leading a group of peers created opportunities for self-awareness**

Fatima was looking for growth prospects, she considered changing organisations. **I was in a weird phase, I was thinking about what to do next.** Then she had the opportunity to attend the SMDP, which she had **heard good things about. To be honest I was pretty determined to be on the programme.**

In terms of the team composition, she **was the only female with 4 guys.** There was a power struggle in terms of whom the leader of the team was going to be. It was **a power tussle because I wanted to be a team leader and one of the other guys wanted to as well. We had to bid or pitch for the job.** She got the role as she convinced the group that she needed to practise her leadership skills, as she did not have a team reporting to her back at work.

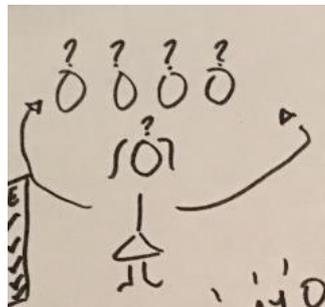


Figure: Only female

**I know that sometimes people had doubts** about her being the leader but she was able to **walk the talk.** For me that was very important and that was one of the 'aha moments'. **Telling people what to do all the time doesn't really get the best results.** If you are going to hold people accountable then you also have to do your part.

**Team lead, what does it mean? Since we were a group of peers, I focused on making sure there was mutual respect.** Accountability, support and respect were the key values in this team. **We communicated regularly as we held weekly meetings and had a team site to share information easily.** I learnt to understand other people's views, different learning styles and how it affected their approach to work. I think I got pretty good at it. You have to work differently considering

these things. It was really, really powerful. That was the strong 'aha moment'. She considered her team a high-performing team.

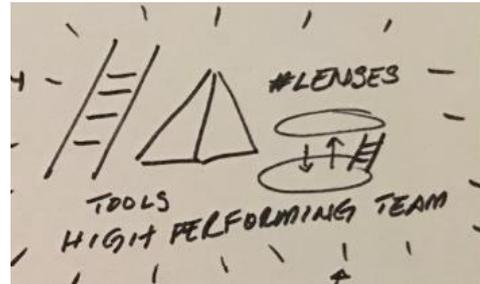
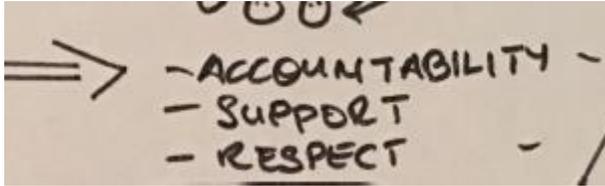


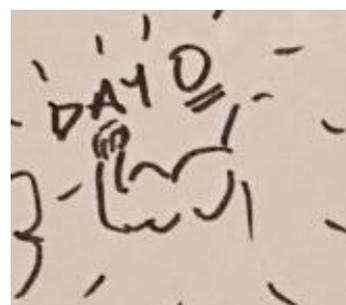
Figure: High-performing team

Had she not been the team leader for this team her **experience would not have been as rich**. I tried to apply things in a **different way in the BDAL**. I remember one or two of the guys in the team saying they tried different tools we learnt on the program with their teams back at work and didn't get results.

One of the first tasks the group had to complete was the design of a team charter. **In that process I remember vividly that it reinforced one of the strengths that I have**. I realised that I am a very strong facilitator. That strength shone through because you had all this power play and I focused on making sure that we all came together and we focused on the objective. A word that Fatima used often was **power play**, which emphasises the struggle for control in this team. The charter helped the team to pull together as it helped establish their common goal.

The team charter was one of the key elements, which made this team a success. **I think we took the task very seriously**. It became the foundation of our team, that charter. **We picked a name we all agreed on, we picked values for our team, we picked goals for our team, and we focused on the semantics**. The group asked themselves the following questions when setting the charter: **What do you mean excellent or do you mean very good? What does excellent mean? How do we deal with conflict in the team? How do we deal with if somebody slacks off in the team? We were very detailed in that**. I facilitated to make sure each team member made input and we all were on the same page. **Because of that exercise we came out as a strong team from day zero. We had a very good basis to start with**.

Figure: Power play



Fatima recognised the gender dynamics in the power play. I'm not a very political person but I'm well aware of politics. Sometimes it's about your gender and I understand when I see certain things why it's happening. In a group of 4 guys I knew it was bound to take place, especially in the beginning. Not only was she aware of the gender dynamics but she was also aware of the team dynamics. In the past, I learnt about forming, storming, norming and performing. I expect to see that. I try to recognise where are we right now. Recognising it and being able to call it when needed, or ignore it.

To make the group work there were certain key elements to consider if the team was going to function well. Firstly, everyone needs to respect. You start to learn people's personalities and with five strangers put into a group to achieve a common goal, you can't do that without at least understanding each other to an extent.

Secondly, you need to have a plan. I love plans. I realise if we were on the same page with the charter, if we had a plan that we were all happy with, then we would be able to use that to move us forward. The guy who wanted to be the team lead, was very informed and he became the second in command. The reason why was because he's very good at planning, he is very consistent.

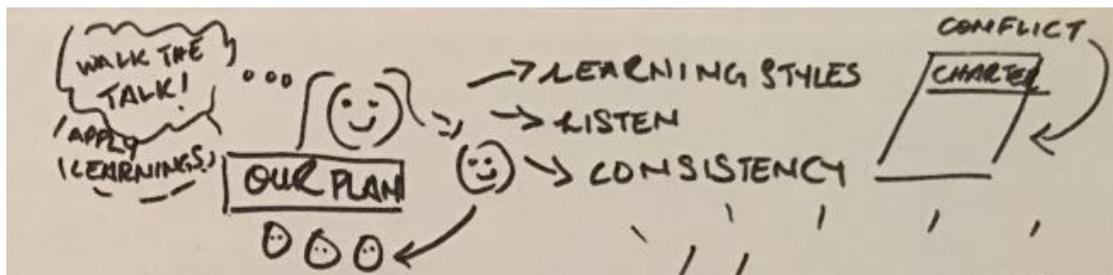


Figure: Plan

I recognised that as one of his strengths. We definitely harnessed that in the group. We did the learning styles at the beginning and that was where I recognised his strength and allowed him to take on that role. Anything to do with holding people accountable to the plan was his job. Some of the guys have other priorities and if you don't hold them accountable then you know you could lose track.

The team spent time on getting to know and understand each other. We had one guy who was very outspoken. He always wanted to talk, it was one of those things that you meet someone and you almost instantly dislike them just because they have an opinion on everything. Team building was really about eating meals

together and spending time together and while we were doing this, we got to understand his background and why he was so outspoken. He felt a need to always speak up because he had a lot of struggles growing up and he worked his way to where he is today. It was very interesting because the minute he shared more about himself, we understood him much better. Once team members spent time together, they began to see the other participants' perspectives. They were then able to show empathy for each participants' circumstances and understand why they behaved in a certain manner.

**We had a guy who was very quiet. His first language is French. It was so easy for him not to have a voice. Two things happened. One, in my role, I made sure his opinion was heard. Two, we realised that he always had very important insights. We might all be yapping away and as soon as he decided to speak we all go quiet because we know there was good coming out. We learnt to appreciate how we think, how we have found value in that, how to listen to each other, how to make sure we are all heard.**

**We did have conflict, nothing too serious. If someone was slacking off, instead of being confrontational to that person, I would ask, "when are you going to be able to get it done? Is it too much? Should we split it? Who else can take this?" There was a lot of support from everyone.**

One of the first things I noticed is that Fatima brought a journal into the interview. She told me that the skill of journaling helped her to reflect on herself and the team during the programme and now she continues to journal when she is struggling with a concept back at work. She showed me a snippet from her journal that she wrote while working on the BDAL. The journal mostly consisted of reflections on herself and others. **At the beginning of the programme, we were given this journal. We were asked to keep our reflections and I literally did that from day one until the end. I found it very valuable. The way that I did this was to draw, sketch and do rich pictures. I actually drew out my thoughts, somehow it sticks more. I would do that for my 'aha moments'. I also left spaces for things that I wanted to reflect on further.**

**You learn to reflect. I would have a reflection on myself and I would have reflection on the BDAL. She would ask herself the questions: As a person how does it influence me? Then my immediate organisation, and then how does it influence the BDAL? After going through my journal from the BDAL, there are a lot that I do and that I'm cognisant of.**

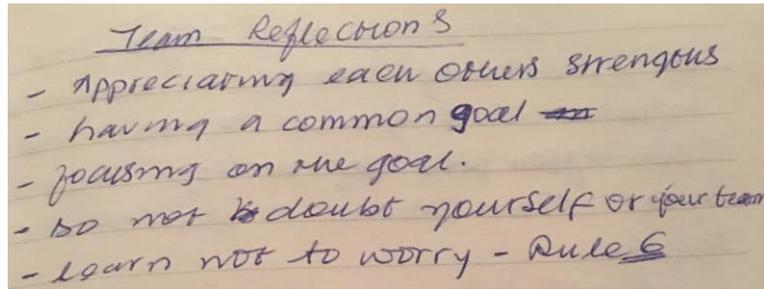


Figure: Reflection

I am not consistent in journaling on a daily basis. I still haven't gotten to that point. Hopefully I will, but then you know, whenever I needed to reflect on a period, I still maintain the journals. I use it for some of the development stuff that I'm still doing.

This team also gave each other feedback during the BDAL itself but also after they had presented their BDAL project to management. **We started to do team reflections. We would give each other feedback. There was a high level of trust in the team that even if what you didn't get was a super positive, then we just took it on the chin and tried to address it.** The group applied this even after the final presentations were completed. **We had a team meeting and we said okay great job everyone, really excellent, congratulations. We all went round and said okay what were you happy with?**

The competition in the class was strong. **Part of our charter was that we wanted to have a very high score in our BDAL. We finished with the best BDAL of the group.**

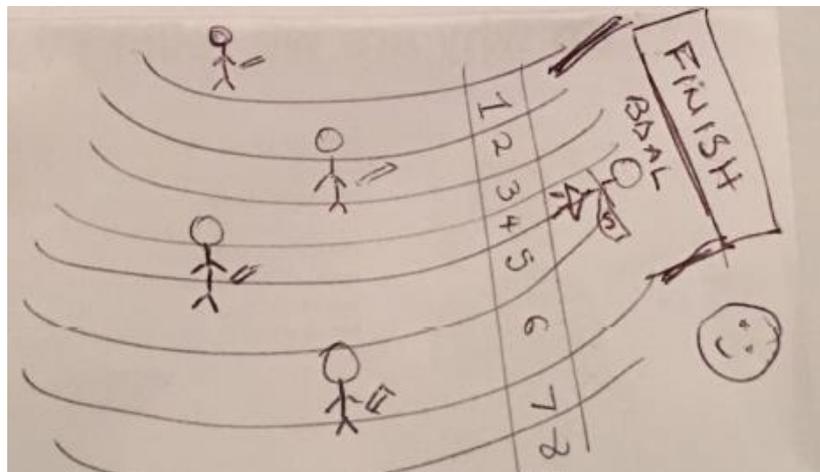


Figure: Finish

This team was successful as they had a strong foundation during the research school, which they built on as they progressed. **We were very purposeful. We all had our different parts to play. The goal was clear. We had trust in each other.**

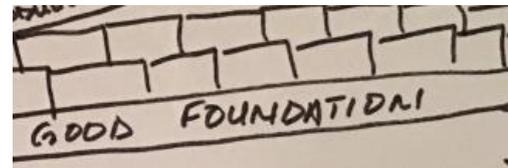
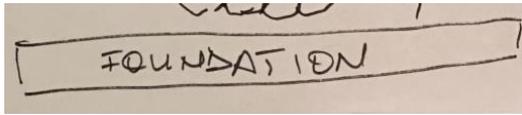


Figure: Good foundation

Fatima implies that she has changed her view on herself and has applied reflection to help her achieve this. **I doubted myself and my capabilities from time to time. I would previously self-criticise rather than self-reflect. I self-criticise a lot. I doubt a lot. How was I going to change that? It's not by saying okay you're self-criticising again. It's rather, just saying this is what you're good at and focusing on that. Things I did not like were not going to change overnight. If I found myself going back to the old habit, rather than beat myself up about it, just move forward - and try to do that repeatedly. I learnt to not doubt myself or my team, rather address the things that I have concerns about. I learnt to identify my strengths better.**

**I'm a last minute dot-com person. That hasn't changed, and I don't think it will change. One of the things I learnt in the programme is to understand why I do it and how to make it work for me. All those negative feelings, I don't have them as much because I understand myself better. It's not criticising what you do, it's being more self-aware. I've learnt to trust my instincts better.**

At work, she has changed in the way that she manages her stakeholders as she has a new understanding of herself in relation to them. **I have a complex set of stakeholders and I do get positive feedback from them. I make the choice because I cannot do everything. Previously I would have gotten frustrated and self-sabotage around that because I tried to do everything for everyone.**

The Action Learning Coach called **on you to reflect using questions. The whole concept of learnt reflection was consistent throughout the programme. It helps to reinforce or tie in what you are learning to real situations. I think that was very important. One of the worst things about learning is when you do not apply it. We have the ability to choose what to use. I was happy because it was helpful to me personally.**

When talking about the other teams in the programme she said that **if it's a bad experience you can't grow. In other teams, I don't know how much people tried to understand each other and have patience for each other in those situations. Because everyone just wants to get the work done. Some people say just give me this part to do and not try to work together.**

**In terms of self-awareness, that was my biggest take away. The strength I had didn't go away but did grow stronger, I was more aware of them.**

In summary, she is more conscious of: **working together with a team. How to manage team dynamics. Particularly trying to understand people. Not projecting the way that I think to approach things. I referenced being a last minute dot-com person. Not everyone in the team would be that way. How does my preference impact someone else? And making allowances for that or accommodating each other. So you don't get frustrated or angry because someone has a different style. I can recognise what is their working style or their learning style. I'm just a little more tolerant; I'm more patient both at home and work.**

#### Epilogue

Fatima took the initiative to be the team leader, which was an opportunity for her to develop her strengths. There seems to be a causal relationship between being the team leader and learning how to get the best out of team members. There is an increased understanding of other people, which is demonstrated in the way she explain how she facilitated the team. Her comment on self-awareness being the biggest take away from the BDAL experience. Self-awareness is one of the outcomes of transformative learning according to Hoggan's (2016) typology.

#### **Julian's narrative: Give space to others as you can't control everything**

Julian relied on **individual contributors and relationships back at work.** He indicated that it is **more effective if you know techniques and what to do in certain situations. You can rely on your personal experience or your friends to take you through but after a point you need leadership abilities,** hence his reason for asking his line manager if he can attend the SMDP.

Julian felt that the hand-drawn image **needed thinking about.** Before he started drawing he had a **thought,** which he described as **an 'aha moment' when you realise it was the biggest item of your experience and then you had to formalise that into a picture. You have to think it through and break it down into issues.** His picture is all about **teamwork, which was a challenge. I would not have been able to just**

come out right with the learnings and the experiences if you had just asked me in the interview without the drawing. I actually found it a nice way of doing it because it helps you crystallise your thoughts better and it is more visually impactful than writing a passage of learnings. That is why I have kept the bullet points as concise as possible.

Julian felt that the group started off in a **positive and optimistic manner** but once they received feedback from the action learning coach, it was a **reality check as the feedback was not great. The group did not challenge themselves and each other enough.** This was because they were **too polite and only later on in the process did they challenge each other's ideas.**

When he first started working on the BDAL project, he thought **it's just going to take too much time. We were completely lost. We had already written, like 600 pages long, without having anything coming out at the end of it.** This statement showed that the group started writing up their findings without fully defining the scope of their project **and they did not narrow down the priorities** and they **didn't know what to focus on.** One of the reasons why the group did not spend time questioning the business problem is that they felt that they **knew everything and could just start doing the project because we all came with a lot of experience, so there was this implied kind of thing that you know how the business works. We really lost focus and direction completely, we didn't want to know.** An 'aha moment' resulted during the BDAL when the group realised that they did not know how to solve the problem when they received feedback on the project from the action learning coach. They realised that they had not given attention to **focusing and breaking down information.** In terms of conflict the group did not **fight, as it was more of a discussion. However, people did get defensive and emotional when they discussed missed deadlines.**

His picture represents the communication between participants in the team, which he has drawn with solid and dotted lines. The lack of delivery from certain members was a source of frustration for him. He repeatedly mentioned how frustrated he was due to the lack of accountability in the BDAL team.

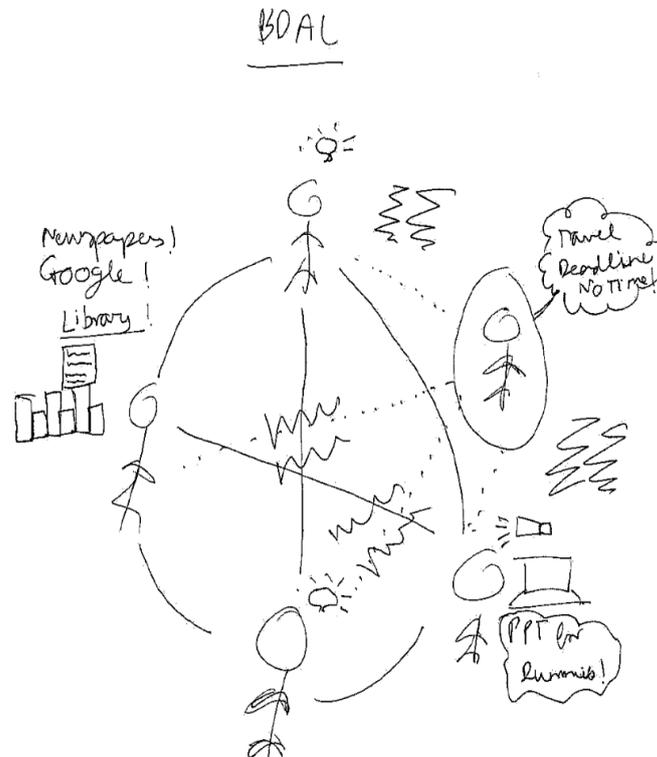


Figure: Communication between participants

In the picture, Julian has written “travel, deadline, no time” as a person giving excuses. There was one person in their team **who didn’t contribute at all**. Julian felt that their team was not good at keeping everyone accountable for the delivery of their work, which he found difficult to not take personally. **I’ve tried to not target the person. It gets quite personal and it doesn’t become a matter of the issue, it becomes a matter of person A versus person B. In my life outside work I have also tried not to take things too personally when I get irritated.**

The squiggles in the picture represent the **interpersonal stuff and things between people in the team. The learning is that I have to stop it from being personal, and rather focus on the issue.**

At work, he has tried to apply learning to the service centre where people have **responsibility but there is no accountability. It is about raising the issue, so it is linked to communication and speaking to the data because that is what gets the problem into the open. Then you can target the problem not the person. When you get the two people to start talking, then they sort out the issue, as things seem to become less important when they work together.**

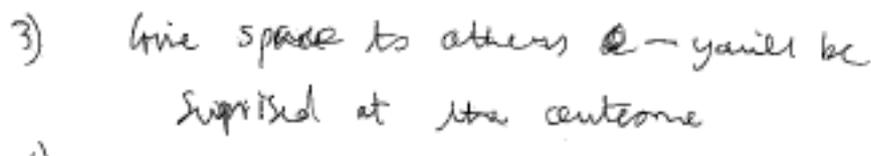
When Julian has taken an action on a topic, he uses the word “I” and when he is offering an opinion, he uses the word “you.” An example of this is: **The learning from**

**this is that I am constantly trying to manage the relationships, especially where you don't have any authority.**

He has **realised the challenges of working in a group, rather than working individually. The flip side is that you can't control everything; you can't control all the deadlines.** The benefit of working in a team is that you also have a **wider pool of ideas and leveraging off everyone's talents in the team.** At work, he has managed to apply this learning by **building up a network, like a pool of knowledge from which you can draw on.**

Julian repeatedly uses the words "I think." For example: **I think there was a bit of disconnect, I think it started off being like that honestly, I think we were feeling quite frustrated, I think it was learning not to take it personally, I think that's more linked to communication, I think that we're all quite polite at times in groups.**

Back at work Julian has been trying to get everyone to collaborate **but it has been slow progress.** He wrote in his picture the following sentence: **Give space to others – you'll be surprised at the outcome.**



3) Give space to others - you'll be surprised at the outcome

Figure: Give space to others

The BDAL has helped given him **techniques to deal with frustration and accountability to implement in day-to-day life, home, personal and work life, everywhere really. Mostly it is about trying out things and seeing if they work. If they work, you can do them more often. If they do not work, then you try something else.**

He has implemented his learning around collaboration. **The collaboration thing has been working quite well. I think we have seen some movement. Obviously not all the time because some discussions don't really have an impact. I think on the whole it's been working better, going in the right direction. From an influencing part, admittedly it's been not as good a progress as I would have liked to have. I think that is something I need to work on. Influencing people around me. I haven't been very successful at it until now so I think that is more a focus area for me going forward.**

**I think maybe I need to chill a bit regarding deadlines. It's much better to go a day later with a better product instead of just finishing something for the sake of finishing. I think I am getting better at it but I just need to focus on it. A lot of our work is deadline driven so I've been trying to focus on it. It goes back to the collaboration stuff.**

### Epilogue

Julian's drawing and in-depth interview focused on the challenges of working in a team and dealing with lack of delivery by certain team members. Since working on the BDAL project Julian has been able to identify his areas of development namely: collaboration and influencing others. He is making progress but indicates that he still has to consciously work on these development areas. Julian's story indicates that he is in a liminal space, which is a "transformative state in the process of learning in which there is a reformulation of the learner's meaning frame and an accompanying shift in the learner's ontology or subjectivity" (Land, et al, 2014, p. 199).

Julian was one of the few participants who only drew one picture, one story line, which was about the group dynamics. Most participants drew multiple story lines. This maybe an indication of learning shock where participants experience stress, anxiety and high levels of frustration (Robertson & Bell, 2017).

### **Mbali's narrative: I am the gymnast who has done a backflip**

Mbali mentioned that she was grateful to be asked to be part of this research.

Although Mbali felt that she is creative, she struggled to express herself visually. **I wanted to phone you and ask you why you want me to draw? I don't like drawing; it does not work for me. Can't I rather write it? I was a bit put out.** She has worked in advertising and communication and is more proficient at verbal and written communication. She was fascinated by what this research was trying to achieve which prompted her to read the research proposal. In addition, she read some of the recommended sources and found that she supported the authors' insights on drawing. Drawing the picture helped her reflect and recognise the transformation she had gone through **However it was more arduous process than expected.**

**Drawing touches brings to the surface the really hidden stuff. It triggers a little bit of that sub-conscious recall, which makes it more effective than writing. I had to really think about which images represented my journey. The images I selected were important, and it literally forced me to think step by step. I found**

**this process immensely challenging and I had to think about it a lot. I prepared a lot and I read a lot because I wanted to understand and add value to your research. I sketched and then I erased it, and did the drawing on and off over a couple of days. I spent a week just looking at it. I used archetypes, as I think people learn using these.**

When she was asked to draw the picture, she asked herself the following question: **How am I going to depict this?** The technique she applied was a combination of a graphic with a mind map. This process flowed for her and the arrows depicted her transformation. She identified that there was always an **external catalyst, a prompt, a jolt** that was mostly facilitated by the action learning coach or the facilitator in the workshops. The jolt was not something that randomly took place in her head, nor was it something that a group member said. She realised that the action of drawing helped to unpack and decode the 'aha moments' for her and this explained the BDAL experience.

Her picture depicted steps to change with an 'aha moment'. Many people have an 'aha moment' during the programme, but they are not able to embrace that moment in the moment. **They won't get to the next step because they find they can't go there, they can't identify/embrace/acknowledge their weaknesses. The only way to break that is to stop and question yourself and interrogate the learning barriers. It is about consciously re-learning.**

Step 1 in the picture was the prompt that created a trigger for her. She described the feeling as a **weird jolt**. In step 2, the jolt caused an **awakening of the unconscious or subconscious, a trigger that carried no immediate conscious recollection, just an awareness of something inexplicable being triggered. In step 3, a sudden association brought about the 'aha moment', a moment of realisation, of self-awareness.**

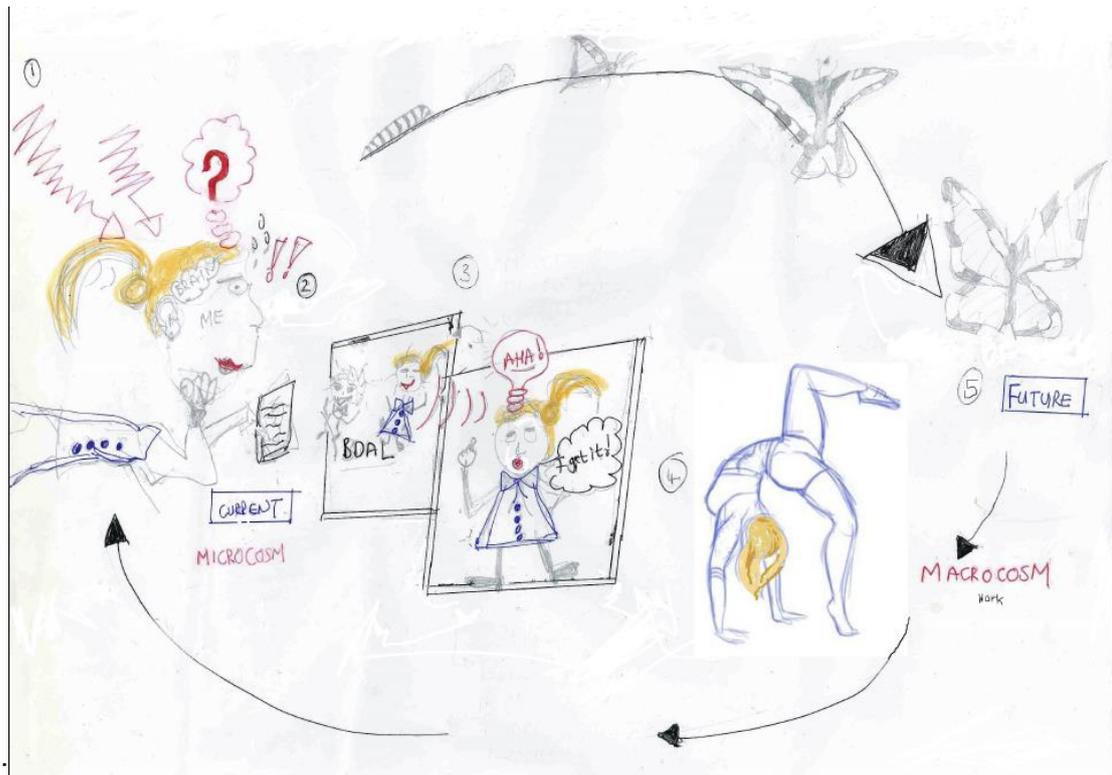


Figure: Steps to reach change

An example of a trigger was when one of the facilitators made a comment in one of the lectures: “If you tend to **attract the same interactions or experiences, why?**” This statement resonated with her and it triggered a realisation that she contributed to the poor interactions she continuously had with her manager. She felt she was the **black sheep in her team and the third wheel with little chemistry between them**. She questioned how she could possibly have contributed to this situation and how she could change her behaviour to alter the dynamic. She realised that the only way change could happen was if she removed the lens of judgement, and altered her perspective. She took a step back as if she was **observing the situation through a microscope** and she thought **it fascinating**. She began by looking at her manager intently. She used the **lens of appreciation rather than judgement**. This resulted in her becoming aware that her manager no longer frustrated her. She took decisive steps by moving her desk closer to her team and spoke in Afrikaans. She realised that she was the barrier, which was caused, by her emotions and her judgement of dislike for her manager. During the year, she looked through a different lens, which transformed this relationship. It took a lot of her applying self-awareness and self-exploration of her insecurities.

Mbali had **big ego moments, which** took place during the BDAL experience. At the end of the programme, she realised that BDAL was like a microcosm of the workplace and the experiences within the BDAL setting were similar to those in the workplace.

She wrote the words **microcosm and macrocosm** in her picture. **The beauty of the BDAL setup is clever. This occurred to me in hindsight: Oh, I know why they do this!** The team dynamics, the work and team culture, values, personality styles are concepts that impact on the BDAL project as well as in the workplace. **There were some of us who were the doers and the drivers and then there were the slackers. I wanted to drive it, and I expected everyone to work like I do.** She realised that not everyone was like her and that everyone had boundaries. This frustrated her initially. **Then I realised, hang on, I need to bring everyone's strengths to the fore. That was big for me!** She became aware that the other members in the team were not 'slackers' but had different goals and objectives for the project. It was the lack of buy-in to the team's goals and purpose that caused the team conflict.

Her first mistake was that she wanted to **take the initiative and drive the bandwagon**, so she offered to set up the team charter, which the team were in agreement with. Once drawn up, the charter looked attractive on paper and the team agreed to the items, as they looked good. However, with hindsight, it occurred to her that the goals may not have been **realistic; the goals were aspirational**.

**'Aha moment': When we instil a set of values and goals we think we believe in, without having clarity on the process, a disconnect is often the result.** She found that not everyone in the team was living the goals, even though they had agreed to them on paper. Likewise, she reflected that similarly in the bigger world of work, often businesses draw up a set of values in an 'outside-in' way and attempt to retrofit them to their employees, which frequently creates a culture of cynics for employees who have not necessarily bought into the values. The critical values process should in fact always be **'inside out'**.

**In reflecting on this, for our BDAL, a better process would have been starting with a fresh, clean, blank piece of paper and all drawing up the values together as a group. Driving the process is fine, but I should have facilitated this in a group setting, from the onset.** The team's contribution was a contentious issue. The group members expected each member to view the world from a common perspective, which was not the case. Often individual egos and worldviews became a priority rather than the team taking precedence. In this team, there was a quieter member who Mbali thought was not contributing enough and was not engaged. Her 'aha moment' came when she realised the **need to satisfy my ego to talk and dominate was preventing her right to speak. I snuffed out her right to speak. That was huge. I had big ego awareness moments.** She realised that she needed to keep quiet and allow other people participate in the conversation. She appreciated her 'aha moment' and needed

to harness her feelings and recognise what caused it. She needed to stop and be mindful. **We have to stop and be mindful of the unintended consequences; we are often too busy doing.**

The feedback loops and reflecting in class helped her articulate her thinking, **it breaks it down better, it breaks down the principle.** The action learning coach also helped advise her on managing timelines. She was a single mum with a busy job and she **realised that in life you don't have to do things on your own. The action learning coach asked the right questions at the right time. He understood, but he was also firm, gentle and human. He made it a safe space. I trusted him. He made time for me. He told me I want to see the process you have put in place to alter your circumstances.**

Last year was **transformative** for her; she described it as **an amazing year.** One of the reasons for this was the teamwork. She realised that the team was important and not the individual and they needed to draw on each team member's strengths and to **work with the different personalities, work styles and ethics.** The team created a safe space. They communicated well with each other by not making decisions without including one another. However, it is interesting to note that each person in the group had personal issues during BDAL. This involved sickness and death but there was always someone else in the team to cover for the person who was unable to contribute. There was a huge amount of respect for each other in this group. **When you talk about stuff, you demystify the assumptions.** They were grateful and appreciated each other.

The team has given her confidence. **I guess I gained respect from my team. People were really giving me great feedback about me. They made me believe in myself ... people saw me as something that I hadn't seen in myself, as a leader. That was very powerful, a transformative thing for me.**

She spoke about the disconnect between the world of work and the world of the BDAL group. **The tremendous disconnect between how we worked as a team in BDAL. This was the perfect microcosm and the disconnect between the world of work. The world of work was broken, dysfunctional. Whereas in our BDAL we worked together in sync even though we had some challenges, some false starts, some storming, but we communicated through it. I recognised that we don't do that at work. At work we are afraid to speak, it is not a safe place.**

Due to the BDAL experience, she felt more confident. **I became someone I had no idea I could be. I have low self-confidence and low self-esteem. I desperately**

wanted to be better and during this process, I became the person I wanted to be. She wanted to be the gymnast and the butterfly in her picture.

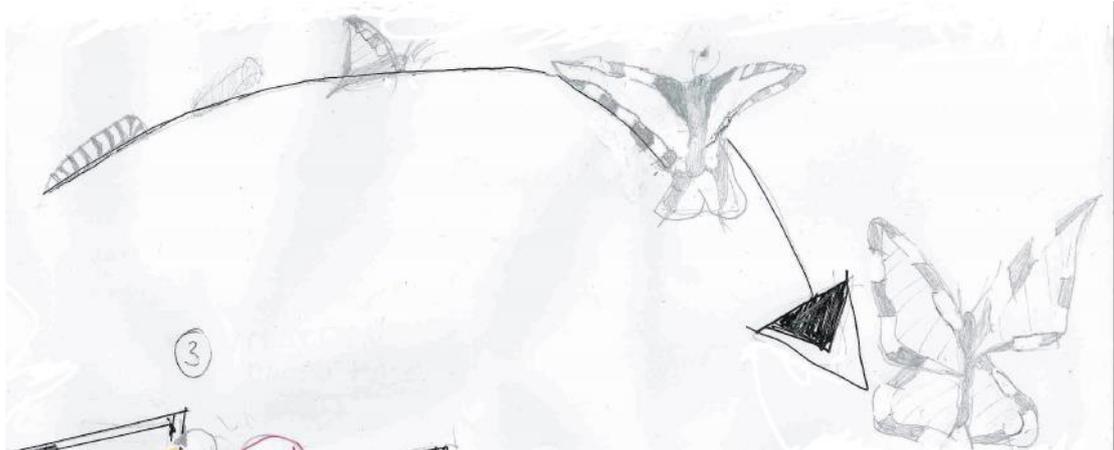


Figure: The butterfly

Mbali's later pictures showed a dramatic change in self, from the gymnasts doing the backflip, to the traditional caterpillar turning into a butterfly. **We had some abusive issues at home as a child, and we were all very, very traumatised as children and we've come out of it quite broken. I always saw myself as that broken person. I struggled to separate that from my identity. BDAL has helped me do that. I no longer see that broken person that I was. She is other. And that's the reframing that's happened. And I can look at her as something separate and feel sorry, sadness for her. But that's not me anymore. I've reframed, and this is who I am. I am the butterfly, I am the gymnast who did the backflip to become that. I am whole. I have a better sense of self, a better sense of self-esteem.**

Not only had she recognised that she had changed but she had received feedback from others saying that they saw a difference in her as well. **It's become self-fulfilling because I feel that people respond to me differently.** Her change in behaviour resulted in a change in behaviour from others in the BDAL team and at work. **When I saw myself like that, people responded to me like that. I'm different now because of this team. So, there is a lot of stuff that's different about me this year. A couple of people in the office have said Mbali you've changed. I don't know what it is about you, but you've just changed, you're just different. A manager said to me you are a completely different person.**

She said that the participant most likely to develop the most was the one who was most open to change. **You know, there is a lovely saying, "when the student is hungry the master appears."** I was hungry, I was ready. **It's a state of mind, a frame of mind. I desperately wanted to change and be something else. SMDP came at a time of real transformation for me. Maybe I was just open to it. It was stuff that I**

**hadn't dealt with in life. I know you're looking for business stuff, but for me it was personally transformative.**

At the end of the programme, Mbali was the participant who was chosen to give group feedback to next year's programme. **One of my colleagues was the top student from last year, and when he was giving us a talk at the orientation programme I remembered thinking wow, wow, I want to be you. I was not the top student but strangely, I ended up being that person who stood out and gave feedback. That was special. What made a difference was readiness and personal space. There's this whole world here, you can go into it, and you can take from it what you want.**

At the end of the programme, she decided that her BDAL learnings had given her the ability to help her work colleagues more. This applied to one of the newer staff members, who everyone criticised. I contacted him and said, **we have just done this problem solving, troubleshooting process and I want to help you.** She applied the BDAL philosophy and worked in a collaborative partnership with him. At work, the focus was on self-promotion and competition; people **hold their cards close to their chest. It is seldom that people take others on the journey with them. Collaboration can make a team work beautifully together. You can produce beautiful stuff in impossible times when you work together. It's a different perspective, this collaboration, working as a team, brainstorming. At work, I see, I watch, I reflect. I kind of understand what is going on and why. But no one wants to do anything, no one wants to talk about it, no one wants to address it. In the past, I walked around with blinkers on feeling frustrated and judging everyone.**

**Prior to BDAL** she did not stop to understand why, how, and what it involved. Her eyes are now open and she sees the world through different lenses. There was greater awareness. She can converge and diverge. **I zoom in and out of things, I stand back and look at the big picture and then go into the detail. Like a well-oiled machine.** She was also aware of causality, as **no single cause affects you.** Therefore, showing the importance of convergent and divergent thinking.

Since completing the programme, journaling was something, she tried to introduce into her life to help her stop rationalising issues and problems. In addition, she tried to be more verbal in her interactions at work and, in particular, to show compassion for others. **I have a deep compassion for people. I have started to become an ambassador for our values at work by living the behaviours. I am trying to be the change I want to see in the world, and it's really working.**

The action learning coach contributed to her learning as he was **completely authentic**. **He opened himself up to give energy and to receive it**. She found it interesting that the action learning coach, who works with many participants and clients, never appeared to get bored with issues that were raised by participants, and remembered individual specifics. **I imagine people can get bored with the vast amounts of information coming in and out from so many different BDALs. The action learning coach, however, stayed focussed and in the present which is a rare quality. To be real, to invite feedback, and to be present in the moment. You also have to draw a line and be objective. I'm your facilitator; I'm not your buddy. But I'm open to your feedback and when it's appropriate, I will be compassionate but firm. He invited us in, but he had firm boundaries without being rigorous. He commanded respect, but he was real.**

The picture depicted the gymnast doing a back flip. This represented Mbali re-framing her world. She asked the following questions: **who am I, what am I and how does this fit in, is this me and how can I change it?** She had done a 360-degree turn. In fact, you could call it an **action turn**. An action turn involved re-framing, validating and questioning.

**I want to be mindful and remember the journey that I've come from with a degree of humility.** At the end of the programme, she realised that all the hours of hard work had paid off. She was delighted to be invited to present their BDAL findings and that some of their steps are being implemented.

### Epilogue

Mbali found that BDAL influenced her life, as she was ready to make the changes in her life, which supports Merriam (2004) statement that participants who are at a mature cognitive level benefit from transformative learning. Mbali had prepared very well for this interview, which was an indication of her commitment to this programme and her respect for the action learning coach as he asked her to participate in the research. However, she might have over prepared which suggests her need to control the content and add value to the research. Participants are "storytelling organisms" (Connelly & Clandinin, 1990) and through stories participants are able to discover themselves and show themselves to others (Lieblich, Tuval-Mshiach & Zilber, 1998).

As a researcher this is the story that one 'wants to hear' as it indicates a complete change, which was represented in the drawing of the caterpillar metamorphosis into a butterfly. However, the journey Mbali took was not an easy journey and she has applied reflection to identify her learning points. It was full of emotion and authenticity.

There is also evidence of the learning that has been applied back in the workplace and in her personal life. Mbali's story is about deep learning, "transformative learning involves experiencing a deep structural shift in the basic premises of thought, feeling and actions. It is a shift of consciousness that dramatically and permanently alters our ways of being in the world" (O'Sullivan, Morrell & O'Connor, 2002, p. xvii).

Narrative inquiry benefits those involved in management development as it helps to understand the depth and richness of learning and change, which can occur because of adopting an action learning approach (Ruane, 2016).

### **Luke's narrative: Questions as a catalyst for learning**

*I'd like to volunteer for this research project* were the words Luke sent via email. I was overjoyed that he wanted to take part. During the interview, he said *I am curious about your research and how you are doing it and I thought to myself I would like to share this experience. I have the opportunity to share it and I want to help with something novel and new and why not, as I would like to help contribute.*

Drawing the picture before the interview helped him focus his thoughts and the feedback he wanted to share with me in the interview. *I think also what happens is when you think, it changes the way you present what you are trying to communicate. It made me really think about what you are trying to say better. I actually left it until two days ago but I was thinking about it for a week and trying to say what are my learnings and how could I depict and portray this in a drawing.* Luke did not mix his words or use words like "um" in the interview. He seemed very sure of his words, which indicated that he had given his story in-depth thought.

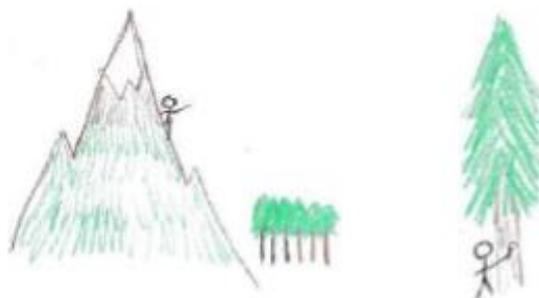


Figure: Wood from the trees, converging and diverging

In the interview itself, Luke mentioned that he was worried about his artistic skills. ***I am not an artist but the drawing skills did not hamper me. I used to be a perfectionist but this makes me intolerable. I drew the picture twice and that was it. I am trying to not do things over and over again and not analyse things to the tenth degree.*** I asked him how he would draw the learning from the actual BDAL project and he said ***I would probably draw a circle of people trying to pull together and trying to get the team to pull together towards a common goal. I think that we may have been wrong in the way that we communicated and so better communication would be good.*** The causal relationship between a common goal for the team and the levels of frustration are important to take into consideration. When group members only try to achieve their own goals the levels of frustration amongst group members increase.

When I received Luke's picture, I felt concerned, as he did not include anything about himself, instead he drew the learning from the BDAL process and the research itself. When I asked him in the interview what he learnt from the process and the research, he delved into the challenges he had faced in working in a team. He felt that the team was not always able to see the big picture in terms of the research requirements as the team did not have a common goal. ***We were so concentrated on getting the work done that we were very often not able to lift ourselves out of the weeds. There was definitely a possibility of disengagement from the beginning as some people felt forced to be there and also some of the people felt that they could not do the work, as they didn't have the skills necessary or the ability to do what we needed to do; it was easier to delegate it to someone else, not delegate, but let someone else deal with it. Also, the subdivision of work was very difficult to do because you have to bring all the work back together at some time – once again the theme of diverging and converging.*** Luke introduced the theme of diverging and converging into his picture using the metaphor of a man not being able to see the wood from the trees. He talked about the importance of being analytical which comes naturally to him but at the same time applying the skill of looking at the big picture.

***Converging and diverging was very difficult for me, as I tend to be very detail orientated. I am an analytical type of person, but forcing myself to take a high-level view is necessary. By zooming out like that, I was able to restructure what we had to make a bit more sense and that was difficult for me, it was quite difficult, but I see the value in doing it now. That is why doing the BDAL in a team is so important as I am an analytical person and I am going to have one way of***

***doing things and another person will look at the big picture all the time and having those two viewpoints is very important.***

Luke's learning was around assertiveness and dealing with others. ***I think that the one thing that I really did learn is just how attuned to justice I am, unfortunately I had a bad experience from a team point of view in that a lot of the team members were not pulling their weight and because of that I got very, very upset. I also realised that I don't sometimes address issues directly. Which is a bit of a weakness. I think that I have also grown since the BDAL in that I much more inclined to speak to somebody about something that I am unhappy about.***

The action learning coach played an important role in helping Luke with addressing the challenges he faced with his team. ***I had a discussion with*** (the action learning coach) ***before one of the feedback sessions and I told him I was unhappy and he encouraged me to address the situation. He said speak to the team and make sure they understand where you are coming from. I don't think it would be possible without*** (an action learning coach). ***The role is so important as it creates consistency as someone is there through the entire programme, if you don't have that touchstone it would feel that you were being thrown around.***

***Confronting the people was a huge challenge as I avoid confrontation at all costs normally, so that is why it was something I had to learn. Bringing in opinions and trying to identify common ground and these negotiations were difficult and the personalities. I was like, just get the work done, this was difficult, and leading a team back at work is like that, as you can't expect people to be just like you.***

Luke saw the benefit of a diverse team; however, he struggled with his team's lack of participation. ***When you are in the experience it is hard to see what a gift it is. It is harder than you ever think it would be. It was a huge amount of anxiety ...but I said to the team ...you can't be scared to change direction if changing direction is the right thing to do. The group changed direction after the feedback from*** (the action learning coach). ***I am in reality an open-minded person, as I don't mind changing. One of the things I always believed was that innovation was something that popped into your head and it was spontaneous, mystical, creative force and we were taught that there are actual processes that you can perform that can bring about innovation and guide your thinking. Eventually it becomes less of a leap from no idea to a brilliant idea; it is a smaller jump to that insight when you are guiding your thinking.***

The experience brought on a range of feelings as the team worked together on the business problem. ***In the beginning, it was a feeling of excitement and a mountain was ahead of us and we were not sure how we were going to tackle it but it was still exciting. Then further in, you hit the doldrums, and felt overwhelmed; you are never going to get through this and then there were points of anger, which has to be expected and towards the end relief and accomplishment.***

Luke not only learnt to work with a diverse group of people in the BDAL but he applied this ontology back at the workplace. ***I realised that diverse viewpoints are important and I realised in the BDAL that people are not the same as me and I needed to be able to deal with them and them not being the same as me is a strength. It is difficult but it is something that you can gain from them. So, I recruited three people in the last year and made a concerted effort to not look for people like me. I asked myself what the person can bring to the team based on their personality, skills, and the way they interact with people so that is something that I learnt from the BDAL, It works really well in my team as we can disagree, and I am perfectly happy for them to disagree with me. That is fine, as I hate the negative connotation that people have of arguments; arguments are good as this means we are talking.***

***With my colleagues, it has changed the way I have dealt with them, with my team... I think... not sure...not sure if I have changed enough yet in this point in time.*** This is a critical statement, as the language of repeating “not sure” shows that Luke is trying to establish if learning has taken place to a greater or lesser extent.

Luke is in a reflective space thinking about his self-development. He has also started working with a coach since being on the SMDP programme. ***I thought to myself that I need some time just to process this and to say, maybe, a few different things that I have learnt and how do I apply them and then what about things I want to take further and start to concentrate on. I would like to sort of crystallise what I have learnt and give myself the space to do that, and I would like some coaching on what paths I can develop within my work.***

***One of the things that I have tried to identify is my purpose, sounds cheesy, but I like cheesy. It is important that you understand what you are trying to achieve with the time that you have and not just flit through life as a high-level thing.*** Luke is asking himself many questions such as; ***“why I am in this job, why I am with this company and what value am I providing to our company as a team. What value am I providing to the company as a person in my individual role and how***

***can I get better and how can I help my manager make the entire department better?***

After the BDAL experience, Luke had a considerable number of questions running through his head. It appears that he was trying to fit the pieces of the puzzle together. This was reflected in the picture he drew.

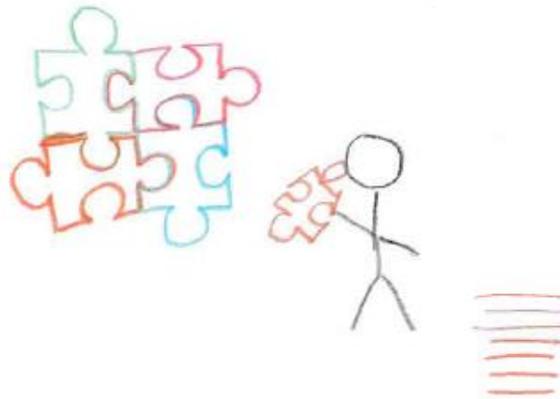


Figure: Pieces of the puzzle

I think he should have drawn a question mark in his picture. He felt that ***BDAL was sort of how do we apply this stuff what we have learnt. This created all these questions and it is this feeling of... you know what... I like the feeling ... uncomfortable...you are not sure what is going on but you know something big has happened and you need to figure out what it is and how do you move forward and what is the next step.***

***I said I have a lot of questions and I can't actually put them down. I don't know what they are. I had seen my colleague go on the programme on the previous year and we talked about it. He explained the types of things he was learning. I did a little bit of research on the website and I was like wow, I liked the really broad programme as it spoke about fundamental things that are important for senior managers. I thought that I could learn a lot, and this is what I can do with it and now. I have finished and have a whole lot of questions, and this is not what I thought was going to happen.***

***One of the things I learnt is that - I don't know if it was Kolb's learning cycle- asking those questions; what did I learn, what else, now what, so what- it is something that I do more and more. Definitely, something that has changed the***

***way I look at things because I approach things now as a learning opportunity instead of just a challenge.***

The action learning coach ***was adamant, and I am not sure if everyone realised the importance of reflection in the morning to answer questions and to a lot of people, this was a chore... if you think about it, you start to gain real insight into the things you have been learning. Without asking those questions, maybe you will figure it out and maybe you won't.***

***My boss has said that he had seen that I am asking different types of questions and taking the initiative in more strategic areas and I think this is because strategy is not that scary for me anymore, it is just a way of looking at things long term. I look at it more that way and I am more involved with team members.***

At the end of the programme, ***the whole team felt accomplished, that was meaningful and that we had contributed something that was nice. I am hugely grateful for the opportunity and that sense of accomplishment will never fade. I have spoken to 5/6 people who all speak fondly of the experience and every single one of them said they hated the group experience but it is a fundamental part of it and shaped the way you look at certain things even now.***

Luke showed application of learning when he mentioned that ***three months ago I started a new thing as I have put together a morning routine where I reflect on my behaviour and if I have been thinking about something for the last day and I have not done anything about it I add it to my to do list.***

### Epilogue

Luke saw the value of working in a BDAL team as well as the challenges of group dynamics as a contribution to the result. This illustrates the significance of recognising the benefit of struggling to reach the team outputs as a way of enhancing learning. Luke reveals that he has learnt to appreciate the differences in people and be more collaborative, implying development in the way he thinks about people. As he has chosen to work with a coach to further his insights, it demonstrates that he values the importance of a coach and this could possibly be linked to his positive experience of working with his BDAL coach. Mezirow (1991) concludes that transformative learning requires that the participant talks to others about their new perspective to obtain consensual validation. He has come to realise that learning is an on-going process and that he still has so many questions to address and this is an uncomfortable space to be in. Mezirow (1985, p. 24) said that transformation can be “epochal...(and)... painful” as it entails a critical re-evaluation of oneself.

### **Sandy's narrative: Letting go of limiting beliefs**

Sandy volunteered for this interview as she felt her organisation and the Learning Institution helped her benefit enormously from the experience, and she wanted to give back to others what she had received.

She told me **I don't draw** and said that she drew the picture 10-15 times. *She enjoyed the drawing process, as she consciously needed to make time to reflect. Reflecting helped her to listen and be quiet. She felt that reflecting was not just delving into her experience bank but also questioning her past behaviour and comparing it to the current behavior.* She deliberated on the feedback people gave her about her behaviour during the BDAL experience and has been able to adjust herself beliefs back at the workplace.

Sandy attended the SMDP as she wished to improve her level of education and this programme was the best fit for her. **The only thing to do is just say I'm willing to learn and then take the steps to learn. I made that choice and lucky for me I did.** She found the learning to be very valuable and wished that more of her work colleagues could have attended the programme.

Sandy mentioned that she did not have a tertiary degree. This contributed to her lack of confidence when dealing with well-qualified people in her group. Her belief that she was not good enough made her feel out of her depth and this had an impact on her behaviour. It manifested itself in her quiet interactions with others. An 'aha moment' took place during the programme when she had to explain a financial element to financial specialists in her team and she realised **hey you're not that stupid. I think that block has been removed. I will step up a bit earlier and just start engaging early in the process where normally I would have waited.** She realised that it was not necessary to have a formal tertiary qualification to contribute to the group's progress. After this event happened, her confidence continue to grow in her interactions with others.

After her BDAL experience, she felt that she was **stepping up to the plate earlier in the process. I will step up a bit earlier and just start engaging early in the process where normally I would have waited.** During the BDAL programme, she wrote a reflective journal. Prior to this, she did not keep track of her thoughts and behaviour and this was extremely difficult for her to do. She learnt to write her thoughts down. Since attending the programme, she has continued reflecting, consciously, once a week. Every evening she reflected on her day.

She experienced positive feedback from people in her work environment who noticed that her behaviour had changed, particularly when they commented: **What did you do with Sandy?** This acknowledgement of these noticeable changes happened regularly, which was previously not the case.

Once Sandy had gained more confidence, she engaged in the BDAL programme by interacting more broadly with people in the company she works for. **What I've really learnt is to go, explore, and make contact with other people, many of which are not necessarily in my environment. I was so stuck in my way of dealing with things. I gained multiple perspectives. I'm not going to think of it differently if somebody doesn't prompt something.** Sandy asked many questions relating to the company. Some people did not like it and felt threatened by it. Overall, however, she had a positive response from people, and from this, was able to improve her understanding of the business itself. Sandy used words like **wow, that was amazing and good will**, which demonstrated how people, willingly, gave of their time and contributed to her thinking. She seemed quite surprised that people were so willing to share their insights with her.

During the BDAL programme, she wrote a reflective journal. Prior to this, she did not keep track of her thoughts and behaviour and this was extremely difficult for her to do. She learnt to write her thoughts down. Since attending the programme, she has continued reflecting, consciously, once a week. Every evening she reflected on her day. This was more pronounced when things were not going well for her and when it involved her team or her client. She realised that it was important to try to understand the other person's point of view. To express this, she drew a mirror to emphasise how two people can look at the same picture but see two different perspectives. In the past, she would hear the **unhappiness, address the notion, fix the problem and move on. Now I want to fully understand where they come from. I am more conscious of trying to understand people's motivation. In the past, there was no recognising where that person came from, the circumstances they were going through and the impact these circumstances had on the way they dealt with things.** In her description of this realisation, she used words such as **that was huge for me**. She had become aware of the benefit of making time to engage and listen with the purpose of understanding their standpoint.

She chose to draw glasses in her picture to demonstrate her learning that people have different views of the world.

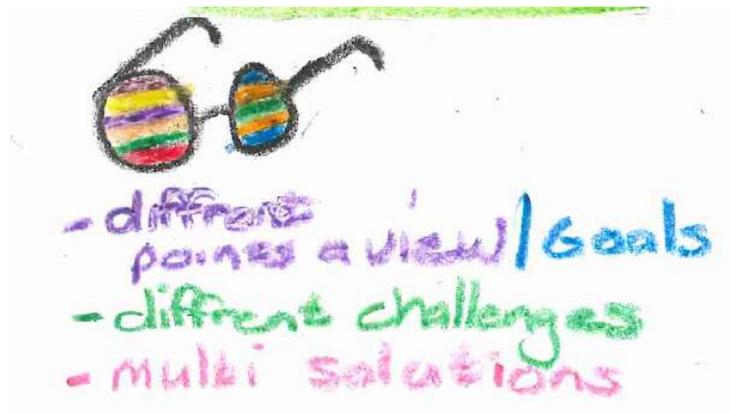


Figure: Different perspectives

She told me that she had become aware that a member of her team at work (not part of the programme) had to catch three buses to work with the first bus leaving at 5 am. Most of the other people in the team used their cars to get to work. She learnt to appreciate that there was a reason why that team member was 2 minutes late. This enlightenment came when some members did not contribute to the BDAL project about meeting the delivery requirements. **For me there were senior people, who earn a lot of money, that were not able to deliver on the simplest of things and I was not able to compute that. Until I clicked that, you have to listen to where they are coming from and the challenges they have. It was the inter-relationships within the group that helped me see this. If everyone was the same, and like me, then I wouldn't have learnt.**

Concluding from the above is that she learnt to reflect. She expressed this skill by drawing a mirror. She learnt that it was important to sit back and reflect.

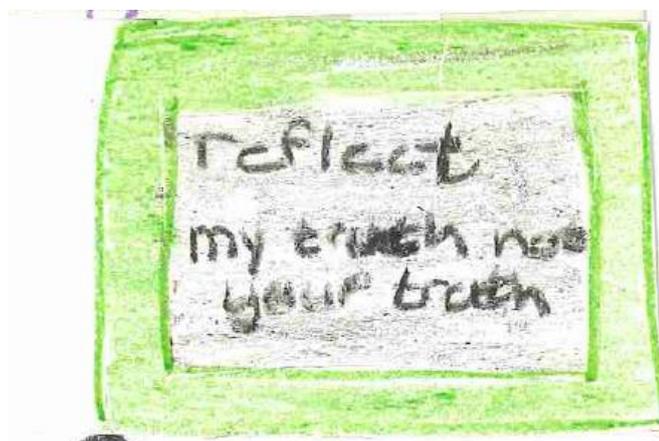


Figure: Mirror representing reflection

**I think about things that I've done, the way that I've done it, and then ask the question why. It's all about behaviour. I don't necessarily spend enough time doing that.** Her quiet demeanour helped her recognise her behaviour immediately and this helped her question what she could control versus what she could not control.

The BDAL experience was an awakening for her. **This is a whole new world opening up for me, the opportunities and the different ways of doing things. But this does not take away from where I come from.**

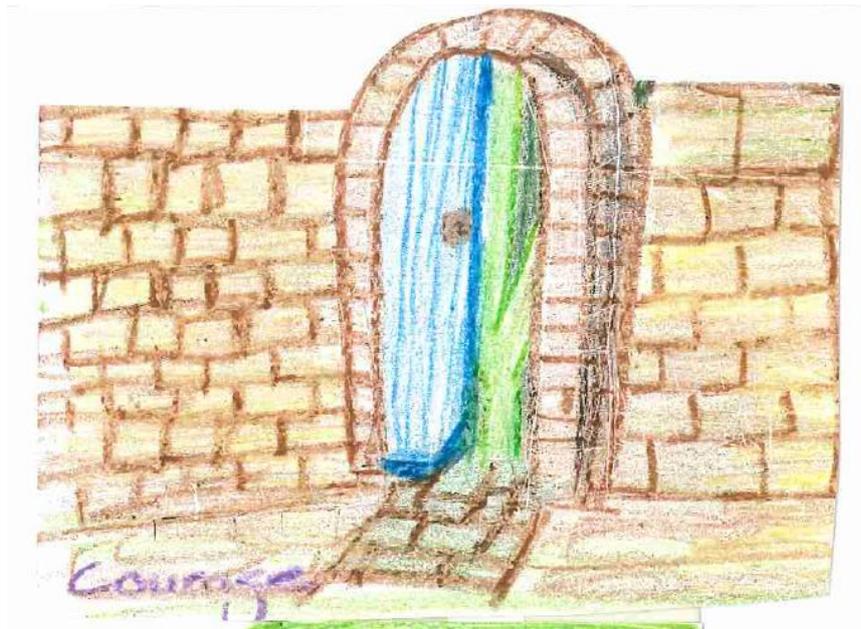


Figure: Whole new world opening up, takes courage

She expressed her insight with an open door. She believed that she knew who she was and as she was in a safe place, she could explore something new. She was going through the door and not going out of it. BDAL opened up a whole new world for her personally; it freed her from previously held limitations.

The BDAL was an emotional process for her. The action learning coach helped in the group to deal with the emotional component by providing details around the BDAL process and giving them feedback. **The coach kept our energy levels up and made us aware of where we were going and that the challenges we faced were normal.**

Her emotions during BDAL were varied. At first, she found it scary to be assigned to a group of people she did not know. After accepting this, she found the meetings to be fun but also stressful, as she had a sense of frustration and desperation. **I don't think anything can prepare you for the hours and time you work, because your work obligations don't stop.** There was disconnect within the group. The members tried to

solve this by giving each other feedback. However, the group did not hold each other accountable, which also happens in the work place.

All her hard work paid off. She said she had experienced personal growth because **I think if you don't put in the work you are not going to get the benefit**. She began to engage earlier in developments (in the BDAL team) and even initiated actions back at work. **What I've really learnt is to go, explore, and make contact with other people, many of which are not necessarily in my environment**. She began volunteer work at an NGO. She now spends more time reading to learn, whereas, in the past, she did not mind what she read.

She is still struggling to make quick assumptions and is continuously trying to unlearn this behaviour, **as my initial response is not always the gracious one**. She is attempting to ask for explanations and trying not to judge. This change in behaviour is a conscious decision she made. Sandy felt that she benefited greatly from her BDAL experience and that she was willing to change her behaviour.

### Epilogue

I called Sandy's story "Letting go of limiting beliefs" because she realised that she was the one holding herself back. Once she realised she was able to offer her group value, her confidence increased and she was able to fully embrace the BDAL experience. Not only did she learn to understand herself through reflective practice, she also tried to understand where the others were coming from. Neumann and Peterson (1997, p. 8) emphasise that stories are "mirrors or windows" that give the reader the opportunity to reflect and reimage their own lives. She achieved this, by trying to understanding each group member's circumstances and asking other stakeholders in the business for their input. Sandy was able to listen and engage more actively with others in the group and, as a result, she broadened her own understanding, experienced personal growth and adjusted long held beliefs about herself and the world around her. The individual transformation expressed in Sandy's story illustrates, what Palma and Pedrozo (2016) describe a more deep-seated paradigm shift, rather than a change within the existing paradigm.

### **Carmen's narrative: This year will bring you to the brink and back**

Carmen responded promptly to my email on whether she would like to volunteer to be part of this research. When I asked her why she had agreed to take part, she said I had taken the time to ask her and that she felt her experience could help future participants.

My meeting with Carmen was scheduled for 8am, which was an early start. I was worried that she might not make it as she had not sent me a drawing that I asked for. I had a feeling of uncertainty while driving to her office, and wondered if she remembered she was supposed to meet me?

As she walked in, she started talking, before she even sat down, saying that she did not like drawing, nor had she found the time to draw. She continued, with the statement: ***I can draw if you want me to***, which she repeated later in the interview. I told her not to worry about the drawing but asked her, if she had to choose a picture what would she draw? Carmen seemed to know what she would draw straight away and described a tree with the roots being what she had covered in class and the leaves would be the 'fruits' of the programme. This indicated to me that she had clearly thought about the picture. The only problem was, she did not want to draw it. However, the question was what were the "fruits" of the programme? As the conversation progressed, I came to realise that Carmen did not seem sure what the "fruits" were.

Carmen's narrative is: This year will bring you to the brink and back, learning is a struggle. These are important words showing that learning is not easy. Maybe it is not meant to be easy as the participant learns through the struggle. Carmen felt that the BDAL process was demanding, she constantly mentioned that the ***BDAL was hard, the challenge was the group work, obviously to sit and get everyone to the same point, not necessarily your point but a point***. She was very aware of her impact on the group and her interaction with others, as she constantly tried to get the group to move towards a common goal and unite. The inability of the group to harness diversity was clearly seen when she mentioned that the diversity in the team was a continuous issue, which influenced the group dynamics. ***It was hard, the three of us just sat down together and worked well and the others were...(sigh)...there was tension but everyone just avoided it in order to get the BDAL work done***.

The group work was challenging due to the different cultures and sections of the business that participants are involved in. However, Carmen recognised the learning that resulted from the challenge. If each group member understood the objective of the group work, they could all work towards a common goal. ***I kept on echoing we are all different but we have a common goal, which is the only thing that we have in common***.

Carmen highlighted that even though she felt the action learning coach supported her, she sometimes felt frustrated with him. The action learning coach played a role in the development of the participant, as ***he was a guide***. The coach helped the group

position the role of the sponsor and the line manager. In terms of the BDAL set, he encouraged the group to talk during the feedback loop session.

A defining moment in the programme came when Carmen *said: **there was one night, I will never forget it!*** (The action learning coach) *said **no guys, this is not working, and I cried and said, how can you do this, as we have worked so hard? I was very upset, after we had put all this energy in. We had to rework a lot of it, and I was embarrassed that I had cried because my teammates were all sitting there, but I was very overwhelmed and fatigued, and for him to say: hey, guys you have to go back, but he was right.***

Readiness for learning is an important factor in how the participant embraces the BDAL process. Carmen asked for funding to attend an MBA/MBL programme and was disappointed when she did not get approval. She felt that being **nominated to attend the SMDP programme was a consolation prize**. She believed that she did not have a choice in attending the programme. ***Everyone who I asked about the SMDP, they lied. People that I have engaged with were not honest about how tough it was and I do feel it was an opportunity that I must take and I didn't have a choice to say no. If they nominate you, it is like an honour and there are so many other people they could have chosen so you have to.*** Carmen seems interested and wanted to be involved in learning. However, maybe, not in this programme.

The main reason why the implementation of the BDAL philosophy was so hard for Carmen was that she wanted to be liked, and was worried about what other people thought of her. Carmen described the internal struggle between herself and her group as 'survivor'. ***It is like survivor, should I make an alliance here? how do I progress through this year? In the beginning, I wanted everyone to like me but in the end, I let go and the BDAL did help, and the fact that we met twice a week helped.***

At the end of the programme, after the certificate ceremony, one of the participants in Carmen's group deleted the Whatsapp group for the set. ***I thought we were going to stay in contact with each other. Evidently, I must have done something that offended her.*** This shows Carmen's concern about being liked.

Carmen described her learning as deep learning. She improved on her assertiveness and on setting boundaries even though she still felt a need to be liked. Putting boundaries in place caused a lot of tension at work. ***Underlying in everything all people want to be liked and you don't want to do something that is career limiting and souring your work relationships, and for me, it was out of my***

***comfort zone to step up and say how do we make this work and BDAL empowers you to do that.***

At the end of the interview Carmen seemed to come to terms with who she is as she said that ***maybe you like it or it is just your view, I am still who I am, I am still good at what I do. It was hard, but I had to come to the point, what you say does not define who I am. What you say does not make me less valuable, so, that was my learning, and it is okay, as there will be someone better or worse off than you and you need to just be okay with who you are. There was deep struggle with the balance and it has taken me a long time to get back, and I am still struggling.***

***I struggle with this immensely, you want the favour of people ...I know I talk a lot about like and not like but that is a big thing for me, I had to unlearn things.*** One of the things Carmen had to unlearn was how to deal with her feelings. Her solution was to write down her thoughts in a journal. ***I allow myself to reflect, write down what is it that caused me to be upset, and how do I handle it going forward. The experience ordered the way I journal. Previously I just used to write but now I ask myself what happened, what is the worse that can happen and am I going to do something about it. I write down when I don't know how to handle a relationship and I actually did what I said I would do, and it worked out fine, and it was not the end of the world. Journaling helped a lot, as it helps me grow, if I make a mistake, Okay, don't do that again, please tell (the action learning coach) that it worked, it was hard.***

Back at work, Carmen changed her view of the world as she mentioned that she is now more aware of what is happening in the world itself. ***It has just opened my view of the world. Yes, although it was a very tough year it opened possibilities of thinking for me and the connections that you make.***

Carmen seems to be more aware of others and her focus seems not to be solely on the self. ***BDAL has made me more conscious of my fellow colleagues.*** She is also managing her boundaries. ***Someone told me my boundaries are not in place and I said I think you are speaking to the wrong person my boundaries are firmly in place, and if I think you had met me 2 years ago, you would have seen a different person.*** Carmen is now feeling more assertive, more in charge, but still playing a pleasing role. ***I have to dig deep if I want to be assertive, and my colleagues have mentioned that I have my boundaries in place. I deliver reports, as they are more insightful. Not everyone likes it. There is one specific person in our team who***

***feels quite frazzled when I said this is where the boundaries stop. I have also set boundaries in terms of my personal relationships.***

At the end of the interview, I could feel Carmen's sense of accomplishment at being a mum and still managing to get results on the BDAL. ***I feel proud in a sense that I have achieved this. It taught me to allow other people to take control and it does not mean you are not good enough.***

### Epilogue

I found this to be one of the more difficult interviews to transcribe as Carmen's thought processes were disjointed. I came to the conclusion that her not wanting to produce a drawing, did affect her ability to fully reflect on her learning. I also felt, the fact that she laughed a lot in the interview, indicated to me, she was not that sure of her statements. However, the interview and the transcription gave me great insight into Carmen's raw experience and her struggle during the BDAL.

She repeatedly mentioned that BDAL was hard and this repetition emphasised the difficulty in applying the BDAL philosophy. The diversity in the group and the different working styles revealed a lack of common purpose in the team. The importance of a common purpose is the learning that she has taken back to the workplace.

Working in a team gave her insight into how she is striving to be liked by the group and how she did not want to challenge the group dynamics. This need to be liked is seen in a transition into her work behaviour and how she is attempting to manage this need in her current work environment. She uses the skill of journaling when she feels that she needs to process her thoughts and feelings around herself. At the end of the narrative Carmen was left with the feeling that she is good enough which suggest that she has come to terms with who she is as a person. Carmen's story indicated that she has changed however; this change is more along the lines of second order change, which is reformative rather than transformative (Sterling, 2010-2011).

### **Nsikelelo's narrative: There are other voices besides my own**

Nsikelelo emailed me to say that she would be delighted to be part of this research and her bubbly enthusiasm came through in the email. Nsikelelo thoroughly enjoyed her experience of the SMDP programme and during the interview, she told me that ***I got so into it, I got sucked in and absorbed.*** She said that her ***learning is constant and I loved this programme. It was so worth it, it was exhausting but soul altering and I would do it again in a heartbeat.***

The fact that she loved it did not mean that it was easy. She joked and said that ***it was hectic, it took me two weeks to notice my children left at home. It took so much time, it does take time and I had not estimated that. I loved it and when I came out of it and finished it and I thought now what do I do with my days? There were TV programmes and series that I had missed and I realised how absorbed I had been.***

In her drawing she drew a spiral to signify her absorption in learning.

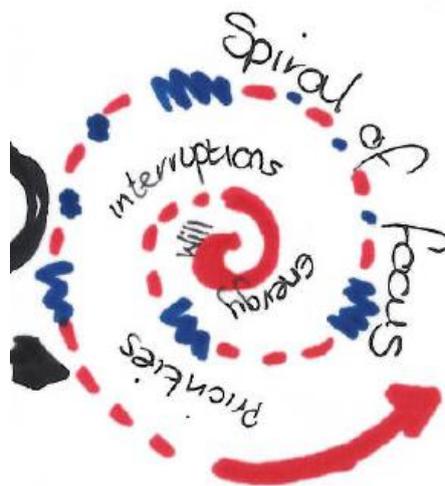


Figure: Spiral of focus

She drew a ***spiral of focus to represent the limbic system - when I am very passionate about something that I am interested in it absorbs me and I would dive in.*** However, she began to realise that not everyone in the team had the same spiral of focus. ***They all have their own enthusiasm levels and that spiral of focus became incredibly frustrating for me. I was trying to move ahead when I wanted to instead of working with a team of people who were passionate, but this was all at different times.*** This caused Nsikelelo a lot of frustration, but she seemed not to let it derail the learning and in fact, she tried to understand why others did not have the same focus as she had.

Nsikelelo realised that this frustration was not because the team did not want to contribute; rather it was that they had different views and perspectives. She used the analogy of houses to explain this learning.

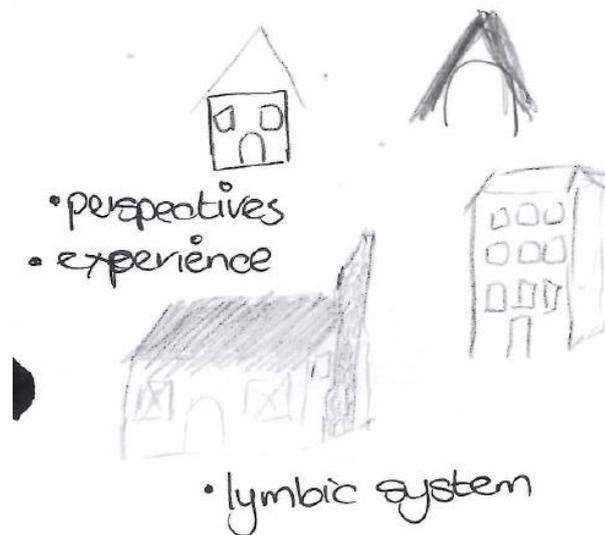


Figure: Limbic system

*There are so many perspectives based on personal experiences and the way you interpret these experiences. The way you have been brought up and the layers within your brain, these were big for me, they were huge. I have drawn my interpretation of houses - you know when you say "my home." I have drawn a typical child's house, but some people from other parts of Africa, in particular my BDAL team, have a very different interpretation and their picture of a house is very different from mine. You get people who live in cities, so you have a housing complex picture and then there is my little English house, which is not my house, but it is what I would like. This is the whole perspective of what you want things to be versus what they are. These are the differences based on experiences.* Nsikelelo has clearly recognised that there are different perspectives and now she asks for clarity, so that she can understand other people's perspectives. Back at work, she now asks for feedback. *I don't just give anymore, nor do I just put out there. Now I put it out and ask for feedback and then I put out again, and so it grows and that has been huge for me. I know now that I am going to get so much more than what I am putting out.*

An example of her change in behaviour using this different perspective is how she produces work back at the office. *I do data mining, I love data, all data and numbers, and I love the stories they tell me. I sometimes forget that not everyone sees things like I do and the biggest thing for me was the limbic system. It resonated with me so much that I use it almost every single day – by analysing how we interact with situations, read situations, interpret what is going on in the*

*environment. At work, I put together pictures for other people of what the numbers are telling me and that I think the numbers make sense, but by talking to people as opposed to just feeding the information to them. I want to use the word arrogant, I have realised my interpretation of the way the world is, is not the only perspective and wow, it is only when you start talking to people about what those numbers mean that you realise that wow there is that perspective and another perspective and this thing really resonates with me.* Nsikelelo felt that her worldview has changed since she has come to understand that there are other perspectives. She drew these perspectives in her picture.

Due to the change in her worldview, her behaviour at work has changed. *I would go into the day and send out my report and the world was going to read what I considered as my masterpiece – not really a masterpiece though, I am not that arrogant. I realised that just taking a thought to someone and saying this is what I see, what do you see? Then they would say, this is kind of what I see but this and that is... it is like facets of a diamond and each time you twist it another light shines for another perspective, but it is the same diamond.*

*That is where the arrogance comes from; I just presumed that everyone just saw what I saw, while this was not the case. I had to respect the fact that there were other voices in there that had to be heard as well and this was big for me. This drove me to go back and talk to people at work, the linkage for me was interesting and that other people's voices are just as important as mine are. This was the first time I had worked on a big project and here were these multiple voices, which were not 100%, aligned with mine. I had to be okay with this and accept that is out there now with my name on it. Parts of it I would change drastically and other bits I could leave as they were, but that this was not my voice even if it would read as if it was and it's got my name on it but it is not my voice. This is big for me. I had to let go and accept it is a complication of voices.*

Nsikelelo kept on saying that she sounded so arrogant that I got the feeling that she was worried I was judging her. When I told her that there is no judgment she described herself as having *individualist arrogance* as she felt that she *didn't need anyone to validate my thinking or anyone to broaden this concept or I don't need anyone.* At the end of the learning experience, she realised that she did in fact need input from others to better understand the complexities in the numbers.

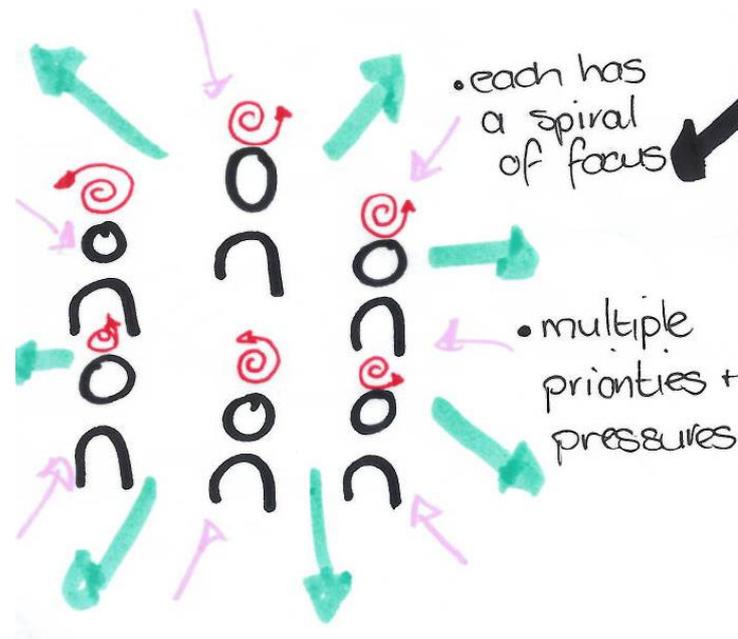


Figure: Converging and diverging

Nsikelelo also showed that she was aware of converging and diverging during the group work. ***Our topic was wow, which is exciting, but we went into a field that we didn't know. We started off with what was going to be our focus and then suddenly the more we researched, it opened up into a huge funnel of ideas. What was really interesting was that some of us got the big picture whereas others stayed in their box. It was frustrating because every time we wanted to go big the others had to bring us back down and it was always expanding and growing all the time.***

What made the group work so challenging for Nsikelelo was that she did not always feel in control and for her to develop as a person she had to learn to relinquish some of her power, or what she thought was power. ***I had to let go of being in control. I am a bit of a control freak and I didn't realise how much of a control freak I was until we had to edit the document and I worked with someone who also has control issues. Luckily, he is based in Cape Town and we work well together. I respect his input and between the two of us, we rode rough shod over the others saying we would edit it and they said that they were comfortable with this. The others appreciated this, as they knew their input would be listened to and they had to just think and contribute, but not edit. I felt out of my depth (during the BDAL) and this is an uncomfortable place to be as I was always the one in control, putting myself in a position of not being in charge as I am a bit of a control freak, and that was big for me.***

The action learning coach helped her, especially during the feedback loop sessions, where the coach *helped a lot by reversing my thinking and talking about unlearning. I could not jump to conclusions immediately as I had to let the conclusion evolve through better discussions with people and what I thought was the conclusion was not necessarily correct. This was why my message was not getting across to my team. I was justifying the thoughts I already had, as opposed to bringing the people along with the story and starting with the basics.*

Nsikelelo talked about and drew the concept of groupthink.



Figure: Group think

*I am very conscious as there is always a new way of seeing things. Yet, I am quite resistant to change when I know something works.* Nsikelelo used a metaphor of a stream to describe her resistance to change. *If you fight against a process or a stream, that stream might divert due to input, but ultimately the stream is moving forward so for me, the group think needs to be balanced with outside influences.*

*I am now more open to listening to others, especially on an equal level especially from people whom I did not consider my equal, or even someone at a more junior level, aah that sounds so arrogant. I didn't mean it like that, but I was not always open to someone not as senior or someone who had not been in the organisation as long. This has been the more difficult bit, being more open to listening, but again to fresh thinking. At one point I was there and I don't want to be stuck in my own thinking and I don't want to be saying we did this 25 years*

*ago and it does not work, as it might work better now. But you also have to use your experience when someone suggests a new way of thinking, point out that we kind of did this before and this is what we did and what we learnt while being respectful of the audience. There are streams that will move ahead regardless of whether you think it is right or not.* From this conversation, I was not sure if Nsikelelo was open to new changes at work or not. At one part of the conversation she recognised that she needs to change but on the other hand if the suggestion had been tried before then she did not want to discuss these options again.

Nsikelelo was struggling with her language as she described herself as being arrogant but also humbled. *I kind of hope I am always changing through my experience, with a huge thing like this, which was massive in a way. I probably would not be as arrogant as I was. It was humbling in a way to realise how much I don't know and being open to others' experiences.*

Nsikelelo also felt that she had changed in terms of what she is reading. *I have done a lot more reading and my reading style has changed and what I am reading has changed. I am reading more help books not just the stories for escapism, but stories for learning. I used to read for my heart and now I read for my brain. I send out an email quote for the day and now the content of my quote for the day is very different, it is more thought provoking than it used to be. I used to pull at heartstrings and now they tease the mind.*

Nsikelelo mentioned that she had to unlearn elements in her behaviour, such as making decisions based on experience. *You can't just wing it, that is the one thing and it is because I have been in my job for so long. I had to unlearn that I didn't know everything and that there was so much more. My world literally opened up. Previously, my world was cool and I was in control of everything. I had a job that I loved doing, I did it really well, everything was controlled, and then this was turned on its head. The unlearning was that I was in a rut and it didn't even seem like it was a rut until I realised there was so much more out there. I am interacting with people differently now, but it is a welcomed change and I do this because I know what is going to come out is going to be better.*

One of the reasons why Nsikelelo was able to learn from the BDAL experience was her mind-set that she was fortunate with the type of people she had in her group. *I think we gave space to each other. There were some teams with strong personalities and stubborn, but we were a good connection and very mature. I have had these people in my home. There was a vested interest in terms of the topic and the*

***learning and there was nobody in the team that had any experience in the topic, it was completely neutral to us and nobody gave expert advice. A lot of the other teams had a far bigger groupthink going on. What worked is that we were all just so enthusiastic and nobody said you can or can't do it and the combination of people was a blessing.***

Nsikelelo described her overall learning as a deep perspective. ***I liked having time to think things through. I had time to assimilate and the reflections that the (action learning coach) created helped me to confirm what I picked up today and I needed to think about what I would do differently. Having a longer time between the programmes gives me a deeper perspective on how to apply things. It is all very well to do reflection during the programme but it is so fresh and new that your daily life and work that sits on your desk fades into insignificance while sitting on the programme. But a year later, what is it that you have actually applied without thinking, what are you applying consciously and what have I disregarded and not thought of and I am thinking oh my goodness, I remember that and that was powerful. One should reflect consciously and regularly as it takes a while to come through the system, I do this at home as well as at work. Sometimes you need short term and long-term reflection but you have to consciously do reflection to bed it down.*** However, this is not always easy and Nsikelelo is cognisant of the fact that ***it is so easy to go back to default as I have been doing things like this for ages.***

### Epilogue

Nsikelelo was happy to share her learning experience; however, she demonstrated concern over what I thought of her, as she was self-critical. Overall, Nsikelelo struggled during the BDAL in creating a balance between controlling the process and gaining input from others. She shows appreciation for other people and the value that they can add to a task. She has also demonstrated a change in behaviour at the workplace and no longer assumes that colleagues see the world from her perspective, which implies that an adjustment has taken place in the way she produces work and interacts with her colleagues. Not only has she adjusted the way she operates at work but she has also changed what she reads and how she interacts with others in her personal life. A contribution to transformative learning is the positive relationship this BDAL team shared with one another. Transformative learning entails “trustful relationships that allow individuals to have questioning discussions, share information openly and achieve mutual and consensual understanding” (Taylor, 2007, p. 179).

### **Louie's narrative: Transitioning through letting go of control**

I was surprised that Louie agreed to this interview as her company is going through a change and restructuring process. **Some of the participants who attended the programme are no longer working for the company and the others who stayed in their position are working long hours and are over-stretched.** Our meeting was scheduled for 5pm.

Louie enjoyed the drawing as the pictures came to her easily. She drew six pictures that represented her journey through the BDAL. Each of the pictures represented the phases and how she felt at that point in time. First she drew the pictures in pencil and then went over the pictures in colour, this took her about 2 hours. The pictures helped her reflect on the programme and helped her identify the feelings involved. ***You tend to forget but when I thought about it I remembered the uncertainty, stressing, feeling overwhelmed, it was good to reflect on it.***

Louie's line manager selected her to attend the SMDP as Louie was interested in learning new things and wanted to further her studies. She was grateful for the opportunity. ***There is always room for improvement, always room for growth, there is always a tomorrow, do your best today.***

Louie clearly identified her thoughts and feelings during the BDAL, which she emphasised in her pictures. She drew a sequence of pictures and in picture 1, she wrote ***Help, breathe, stay calm, Huh, what, crazy, eish, oh boy*** and in picture 3 she wrote ***frustration, laughter, progress.*** Drawing the learning process helped Louie identify her journey of letting go. She had mixed emotions during the BDAL. Initially she was unsure, as she did not know what to expect, so her first reaction was fear and uncertainty. Then as the group learnt and progressed, she thought ***I can do this, I can take the next step, I can complete this and I can make a success of this.*** The end result is that she thought that ***it was worth it.*** The emotional journey changed her as her confidence grew and she understood what was expected of her.

She was the only female in her group, which presented challenges for her. ***I was the only female in a group of men, which was difficult at times, but taking that step back and to say I am not going to stress about this as I am giving my all and I am going to enjoy every moment of it.***

Louie directed the interview straight towards the challenges of working in a BDAL team. Her initial frustration was with her group members' contribution. She felt that half of the team were contributing and the other half was not interested, or so she thought. Her 'aha moment' was when she realised that the BDAL team was ***here as a group and***

**not as individuals, and we each have a part to play.** After a while, she realised that the other half, whom she thought were not contributing, was not because they were not interested but because they had other challenges in their life or other skill sets that they displayed later on in the BDAL process. She began to change her mind-set as she realised that everyone has their own constraints that are not always visible to other people in the team. When she listened to her team members' constraints, she learnt to be patient and **learnt to let go and not be in control all of the time.** She realised that she needed to take a step back and enjoy the learning process instead of pushing and driving. She realised that you cannot force the process and every team member has his or her own sense of urgency. She mentioned four times in the interview that **I am doing the best I can** and **I am giving it my all.** With this realisation came the fact that you cannot always achieve results in your time but you need to take others in the group with you on the journey and **we are going to carry each other through this so we can succeed at the end.** She often said **I am going to enjoy every moment of it,** showing that a positive attitude and readiness for learning is an important component in learning.



Figure: Sequence of pictures

Louie not only learnt this lesson during BDAL but has also taken this learning back to the workplace and has started to engage with her staff with the purpose of gaining

understanding. ***I talk to them so I can understand where they are at this point in time.*** BDAL has enhanced her capability to assess the situation and decide on how to take the next step. This has helped her manage her frustration while working with her staff as she realises that some people are not always ready for the next step. She no longer makes assumptions and she tries to ***look beyond the obvious*** and treat people more on a human level. She mentioned that in the past, she would have just let incidents happen without addressing the behaviour, but now she approaches people if something is not right.

Feedback from the action learning coach was that she needed to ***take a minute to look up and see where else I could have helped, rather than focus on one thing. I would then have picked up that there was something else that I was missing. I was so engrossed at that point in time that I did not see the bigger picture.*** She was disappointed with this feedback as she was working towards a deadline and once again, she mentioned I was trying ***my very best***. However, she now realised that she should have stepped back and looked at the bigger picture to see if there was something else going on.

This feedback has helped her in her work role as she has realised that she cannot take responsibility and do everything herself back at work. She has learnt to rely on her team and give them more responsibility. ***It is only when letting go and stepping back that I can look at the bigger picture. I now realise that my team has capabilities that need to be developed and I can guide them in this, as I don't need to do it all myself.*** Picture 6 in the sequence of pictures shows the benefit of relying on the team now that Louie realised she has a team of people who can support her with the workload. ***Everyone has a different frame of reference, every person a different strength, every person has something that makes them shine. Two minds are better than one, and I am now able to tap in and rely on the team to care for one another.***

The sponsor always made time for the group and came to their meetings. She showed interest in what the programme was all about. The group members were supportive of each other and they ate meals together – ***when you share a meal with someone, you see another side of them because it is not always just work*** She no longer feels that she has to control everything and comments that ***I think that is quite a big thing*** and ***that is a big change for me.***

The BDAL has helped her with her self-development, as she now feels ***comfortable in my own skin.*** Her mother has also commented on the changes she has seen in her

daughter as she has said that she has grown as a person. She also feels that Louie has grown in confidence and that she manages herself better when in a stressful situation which results in benefiting the team.

***I realised that I am on earth for a purpose and if I think about the BDAL process, everything contributed to me moving into this space. I work with lots of people in a day and I need to adjust to each situation and not just think what suits me, I need to look at the bigger picture.*** After completing the SMDP, she has started to look after her own health, also mentioning earlier on in the interview that one of the team members had a sick wife during the programme. But not only is she reviewing her physical self, she is also reviewing her spiritual self as ***I am in a place of searching who I am and what my purpose is. I know I will find the answers. I am looking to find where I fit in and why am I on earth? This has been a big change for me.***

She has spent the time between the programme and now embedding the learning. ***This journey is about yourself even though it is an organisational BDAL. There are certain aspects that you learn but it is about developing the manager that is inside you. I am now able to approach people differently at work and in my personal life and take a step back, even though we are very engrossed in our daily tasks and we need to take a step back. For a manger to grow there must be people focus and investment in the team. It is not that I didn't do this before, but I didn't think about it like this, it was not that obvious to me. I was supportive but didn't give this a second thought. Now I think about it, as I need to understand others' frames of reference and where I as a person can help others to get to the next step.***

### Epilogue

Since working on the BDAL project Louie's has started to ask questions about herself and her purpose, which implies that an adjustment in how she sees herself has taken place. Transformative learning requires a deep structural shift in thought, feelings, and actions, which alters the way of being in the world (O' Sullivan, 1999). Louie is not only looking at herself but she is also seeing other people differently. Louie's narrative of letting go has allowed her to see people in a different light and understand their frame of reference. Her knowledge on management skills is not new but her perspective on people is as she is starting to see and understand where people are coming from. In so doing, she has also grown in confidence. Her examples at work and home include how she is dealing with people differently.

Significant people in her life have commented on the change they have seen in her. This is an indication that there is a “fundamental recognition of paradigm and enables paradigmatic reconstruction and is definition transformative (Sterling, 2010-2011).

### **Sally’s narrative: Improved confidence and self-belief due to accelerated learning**

Sally did not send through a drawing of her learning. She mentioned that she was hoping to gain clarity on the expectations and why the drawing was necessary after the interview. During the interview she said **I’m a last minute type of girl, so I do everything last minute, which needs to change. I do everything last minute. I even started my assignments the day before.** I was left with the question is she just unsure of the requirements or is she still completing tasks at the last minute and doubting herself? Did she not draw the picture in case she got it ‘wrong’? During the programme she submitted her assignments last minute and she received high marks so maybe she does not see the benefit of changing, I am not sure.

The relationship with her line manager has improved because of this programme. She would say to him during the programme: **I hate this! I don’t want to do this anymore; it’s taking so much time! When I started the BDAL I was very close to quitting. I didn’t want to do it. I didn’t have time, I felt overwhelmed.** He would encourage her to continue on the programme by saying that she would see the benefits at the end.

At the end even though it was a struggle, it was worth it. **I pity people who are attending this year...** one of her work colleagues is attending the programme this year **and when she told me she was on SMDP I said shame, I pity you. But I told her she must do it. I said definitely do it, it’s just not going to be an easy year but you must still do it.**

Sally struggled during her BDAL experience and described the BDAL as **a tough journey... I want to say enlightening but... No it wasn’t enlightened ... It was more an understanding... understanding strategy, high-level thinking, complex thinking. A journey to understanding yourself.**

A turning point for Sally was when she received high marks in her individual assignments and the BDAL set asked her to be their team leader. The set initially rated Sally poorly as she was late for meetings, but once they saw her high individual marks for the assignments they asked her to lead the team. At first she was sceptical that the group had asked her to be their leader, but once they got to know each other she

realised that the set was interested in her opinion and when she asked members to contribute, they did so. **After a while, I saw they actually wanted me to be team leader, they do listen to me and we do work together. We actually had a very easy group compared to the other groups.**

Sally's high individual marks also helped build her self-assurance. **I got my confidence up. I put so much pressure on myself and I doubted myself. I quit before I'd even completed the race.** This doubt and not measuring up created a high level of insecurity for Sally. When I asked her how the BDAL has changed her she said that **in terms of my confidence and believing in myself that is what has changed.**

Sally had never before enjoyed working in a team setup. **I've always been anti-group work because I always feel that I've pulled the most weight in group work.** However, she learnt to give other participants the opportunity to also do their part, while at the same time trying not to overpower them. She was responsible for editing the final document and struggled not to re-work the other team members' sections when it was not up to her standard.

Sally continues to strive to manage her high standards of herself and others. **That's what the BDAL has also taught me. To not be so involved in operational day-to-day things and let go. I handed over more things to my two managers in terms of day-to-day stuff. ... so that was big... it's tough.** This emphasises the struggle in changing behaviour and that to make a difference is difficult.

Sally's BDAL set included a **lot of different personalities and all of them are in senior management. Everybody thinks they're right.** This statement emphasises how difficult it is to thrive in the corporate world, as you are not allowed to show weakness, as you have to show that you are correct in your answers and your thinking. During the BDAL, she learnt to work with her colleagues who are her equals, where everyone is on the same level and that members need to compromise in decision-making. She has learnt how to **get to a point where I accept your idea or what you're saying as the best one for the group.**

**BDAL made me realise that I'm actually a good leader in terms of managing a group of people. I was the one that kept the focus in the group.** The BDAL has built up her confidence as she was able to encourage the group to achieve their objective while at the same time manage herself and her responsibilities as a mother, worker and a student.

Sally's emotions were varied during the BDAL process. Initially she felt confused, as she was not sure what the expectations were. Then she was frustrated as a lot of initial

work went into the project and then the team had to rework the topic and start all over again. **It was a lot of frustration with the process. In terms of teamwork some people are not as fast to pick up on things as others, so patience with them in terms of you know what we're trying to achieve with this BDAL. A lot of patience going back and forth, just trying and believing in yourself.** The team constantly asked themselves the question **what are we trying to achieve?**

The team meetings were productive and there was synergy amongst team members. **We started our meeting with highs and lows. We met every Tuesday and every Friday, which took a lot of time. Tuesdays we met after work, Fridays we met from 2-4 at head office. So it took a lot of time out of our diaries. We had a minute-taker and we decided up front what we were going to focus on. There were clear goals and outcomes that we wanted to achieve with each meeting. We shared our learning outcomes and our 'aha moments'. We always talked and not just about our BDAL topic and I think that's what made our teamwork well.**

After working on the BDAL project, she has learnt to ask **why? I need to understand why. Because before I didn't ask the why question so much. Why are you asking me to do this and what is the purpose of this?** She is focusing more on efficiency back at work. She has stopped doubting herself at work and one of the other managers has even noticed her level of confidence. **I don't second-guess myself. I make a decision and I'm very clear about it. Even to the other managers, the one girl said she wished she had my confidence.**

Sally is also giving her team at work space to learn which is hard for her as she normally takes on all the responsibility. **I'm a perfectionist when it comes to my work. I do things where it will take one person a day to do it. I will probably do it in an hour. Because of my skills, I'm like a machine.** One of her staff at work has mentioned that she is happy that **I've given her that space to learn and make mistakes. I've realised my way's not always the only way.**

She has learnt to set short-and long-term goals due to her BDAL experience. **You have to break down that goal into a million smaller goals. That's the one thing that BDAL has helped me with in the whole process. You have to ask: how are you going to get there?**

**If you had to look at the person that started two years ago and the person I am today, a lot has changed for me in my life, at home and personally. BDAL isn't the only reason why I am what I am today. But it has enhanced it; it has helped**

**me to see things quicker. See things that probably would have taken me longer to see. It accelerated my learning.**

**The BDAL teaches you about yourself and how to grow as a person. Not to doubt yourself. It teaches you how to work with other people. If you want to go far in your career or you want to go to the top, you will be working with executives and each one has their own opinion and each one has their own way of doing things. And if you can't work with them, you're effectively working against them.**

### Epilogue

Sally shows her vulnerability in learning as she uses the word tough multiple times in her interview as well as expressing that she felt overwhelmed and frustrated. When a participant makes themselves vulnerable then they are able to recognise growth opportunities. As she started to doubt herself less, she grew in confidence. As she demonstrates more confidence, she was able to modify her behaviour and take other people's needs into consideration. She has also broadened her skill set in terms of setting goals and improving her meeting skills.

In summary, Sally's learning is about accelerated learning in being able to recognise her strengths and weaknesses. Transformative learning is about helping the participant become aware of how and why their assumptions have come to inhibit the way they perceive, understand and feel about their world (Mezirow, 1991).

### **Logan's narrative: Moving beyond the self and recognising the importance of others**

Logan volunteered to be part of the interview, as he wanted to determine if he had identified the *right things* from a learning perspective during the BDAL. The words "right" implies that he was unsure of himself. ***The big questions you asked me - what has changed with me and has it changed my thinking, about me personally, triggered thought.*** He saw the interview as an additional opportunity to gain insight by reflecting on his learning. He wanted to share his story as the BDAL topic was significant for him as one of his family members died from the problem the BDAL topic was addressing. ***She had a respiratory tract infection and she died from it, she died from it and this is something close to home.***

Logan initially wanted to complete an MBA but his boss, who was a previous participant on the SMDP, encouraged him to attend the SMDP. ***My boss said, just give it a chance and go on the course and tell me about it afterwards. I have no***

**regrets.** He felt that the BDAL **was the extra push** that got him to where he is currently in his career. **I loved it and I loved everything that I learnt. I doubted myself upfront but then as I went through the process my capabilities showed, my love for something like this showed.**

When discussing the BDAL process he mostly talked about the importance of working in a group. Initially he judged his group but after working with the members, he began to appreciate the value that each person contributed to the group. **Initially, you have an impression of each person in the group, but as time passes, you realise that these different personalities, perspectives and life experiences are actually gold in the group. As these people all have their own dynamics and perspectives to bring into the BDAL, you can learn a lot from them if you just give them a chance and hear them out.** In this extract, he used the word “you” but did not tell me what he had learnt from the group.

He realised that he had to be quiet and listen to benefit from the group members’ contribution. **I have always been someone who talks more than I listen. During the BDAL time, it was initially frustrating, but I learnt to listen more than I spoke.** In this example he used the word “I” and personalised the learning as he realised that the quieter people could make a valuable impact to group discussions if he gave them the opportunity to do so. **The quieter, amiable people in the group could make a contribution.** He also realised that the outspoken people often determine the power balance in the group.

This group was able to recognise the contribution of each member through a method called the talking stick. They applied a metaphorical talking stick to give each person the opportunity to contribute. The team leader, who was Logan, managed this communication method. **If you are holding the stick, you have the opportunity to talk and everyone else must listen. After we used this, everyone had a fair chance to give his or her input.** This is an effective example that showed an application of a communication tool. However, I was left with the feeling that I would like to ask a group member what they thought of the tool as maybe being the team leader Logan had a different perception.

The size of the group also contributed to the effective communication, with **fewer people in the group it was easier to split up the work and we got more work done.** Working in a team helped Logan understand the different Kolb personality styles. **Being aware of these differences and what makes people tick allowed people to be themselves. Each person in the group has value to add in their own**

**way, that was a big learning for me. Because of this, we did not have horror stories in our group and we did not experience what some other groups did.**

Logan has applied this learning in his panel interviews where he has extended the period of the interview to really get to know and understand where the candidate is coming from. He has also taken the opportunity to become involved in a new business model at work where he is starting to learn from managers in other companies as he is working on **becoming a better leader. The more leaders you associate with the better you can become.**

The group dealt with their frustration level by recognising when conflict was present. **We handled conflict very well. If people were frustrated they aired their frustrations and we heard them out and adapted to those frustrations. I believe you can't argue with someone's feelings. They feel a certain way because of certain reasons and you have to acknowledge that and give them the opportunity to vent. You also have to change dynamics in the group to allow members to operate effectively and we did that. Communication is key. When we felt frustrated or someone could not do something they explained the reasons, which decreased the frustration levels.** An example of this was when **one member was going through difficulty in a relationship and she said I can't at the moment, as my head is not in the right space. We respected that. I think open and honest communication was key in our group and really helped us along. If people don't talk and say what is happening you get frustrated with them, as you don't understand their situation. With us, because we communicated effectively and honestly, we were able to understand and fill in the gaps. There were times when we had to do other members' work and because they were open and honest about it, we did not mind. This was key.**

Logan, as team leader of the BDAL team, took responsibility for the communication amongst team members. **I took ownership when there were difficult conversations to be had. I was good at diffusing conflict. In a telecon, I diffused a potential conflict situation.** He did this by explaining to **the member where they fit in and the value that they add.**

Logan felt that understanding the group was one of the biggest benefits of the BDAL, as he has now realised that he does not manage people effectively back at work. **The group work and dynamics are the biggest learning. When you research yourself, you and only you, are responsible for the marks that you receive. But when you start to move into more of a strategic position in your organisation, you have to work with others. I think it stretches you in terms of working with people. You are**

*not only responsible for something of your own but are also responsible for something involving other people and how to get the best out of them. How to involve them in something that is your responsibility. It stretches you and what is extremely frustrating at first, is absolutely necessary as it is something that is part of your learning and development as you grow in an organisation and in life. BDAL has taught me how much value other people can add to something that you are responsible for. Sometimes you think you are so wonderful on your own but fail to realise how much more you can achieve with others.*

As Logan's skill level increased he understood the expectations regarding the BDAL, his confidence grew. *I used to doubt myself regarding any big task that I took on and thought phew, this is tough, how will I juggle this? Well, it was tough and stretching as I progressed my ability increased and my capabilities showed. I absolutely loved it and I loved everything that I learnt, especially how to look at things differently.* I am still left with the feeling that he does sometimes doubt himself as he mentioned that he volunteered to participate in this research to see if he had mastered the "right things."

The action learning coach played an important role as he helped the team stretch themselves. *He wanted more out of you so he gives you that feedback and stretches you more. If you are content and no longer hungry, you lose that stretch.* Logan uses the word 'stretched' a few times in the interview. The stretch for Logan was working in a team and dealing with the group dynamics.

Logan has applied his knowledge back at work in terms of strategic thinking. *Strategic thinking, I do it constantly, as I live it, it is not just a concept I learnt, I live it. I implement strategy in my life because I want more. I think strategically about my life, I want to do my MBA and I want to start a business, which I have registered. Applying strategic thinking is the second biggest thing I have taken from this. I am thinking about the next big thing - not all the ideas are taken up, there must be the next big thing.*

The theme in his drawing and in his interview was shifting from an operational focus to a strategic focus. *Now when I look at my staff I think how to develop that person in the bigger context. My individual development plans are more thorough as I think more strategically about that individual. I gain more from my staff, as they know what the plan is for them. Strategic thinking has opened my mind to a lot more. BDAL has really shifted thinking for me.* It has shifted his thinking about being more strategic but how has it shifted his thinking about himself?

He has identified sustainability as a key driver. ***Sustainability, if we only run our business for profit there will be nothing left to profit from.*** He has identified that sustainability is not only relevant for the business but for the country and that, he is actively trying to action on this concept. ***Everyone needs to give back to the community to make sure we close this income gap in South Africa.*** His group chose a BDAL topic that focused on sustainability and he gave me work related examples where he is trying to focus on sustainability in his business. The BDAL topic is also personal for him as a family member died recently from lack of access to healthcare.

Logan sees himself as a leader and as someone who can take responsibility for the changes that are needed in business. ***We are the future leaders and as we move through the ranks, we need to break down old structures, as these structures don't communicate with each other.***



Figure: Converging and diverging

He is working on breaking down structures by applying the skill of converging and diverging. ***Converging and diverging, we do that in our daily lives. We make hundreds of decisions every day and we have to converge and diverge. Being consciously aware of this going forward changes your thinking in a sense as you look at things from a big picture and then a smaller picture.***

Logan sent me a mind map of his personal learning and when I asked him to redo it and send me the revised picture; he sent me another mind map, with two pictures included. The picture on the left is the first picture he sent me and the picture on the right is the second. ***I am not good at drawing but I have an idea of what I want to draw in my head but if I draw it, I am scared it will not come out the same as I am thinking. I struggled.***

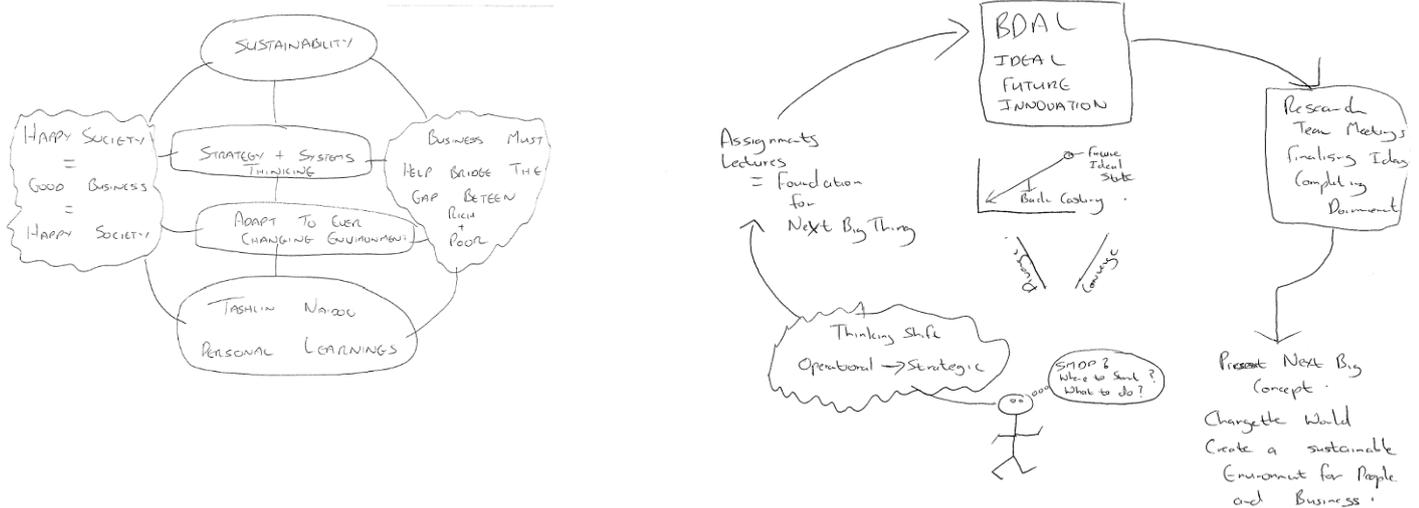


Figure: Mind maps

When I first received these mind maps, I thought that Logan had misunderstood my brief in that the mind maps had little to do with personal learning. Mind maps show flow and connections but these examples do not show the personal learning related to self. However, after the interview I came to realise that he confirmed his learning around knowledge based concepts such as strategic thinking and sustainability. However, he also had insights on the team itself that he did not include in his picture.

***It comes back to sustainability. We are sometimes so focused on our own little life and our own family and what we do at work that we forget about the bigger picture. I need to give back and work towards the bigger picture and this comes through very strongly in the BDAL topic. It gives you a sense of responsibility and how you need to change things so others can have a better life. You can't only change as one person; you have to change the environment. The way you can do that is by building yourself up to a level to where you can make big changes in a corporate or start an organisation that can affect change in an environment.***

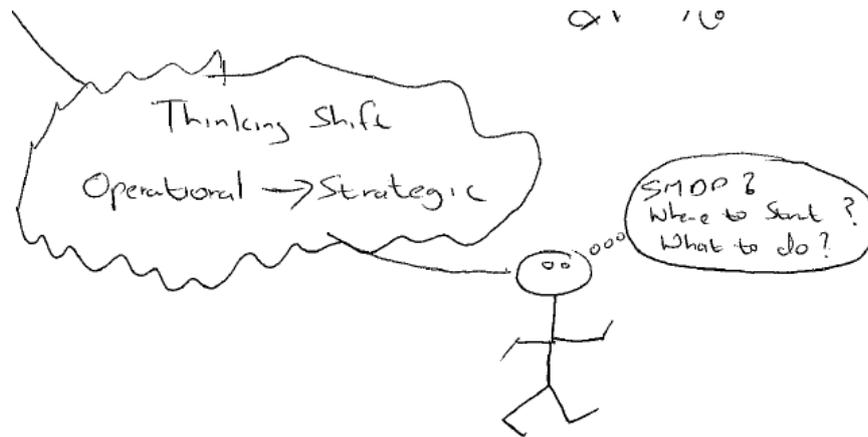


Figure: What to do now?

Now that he has finished this SMDP programme, he is still keen to learn more. In his picture, he has asked: **Where to start? What to do?** He asked these questions himself at the beginning and at the end of the programme.

### Epilogue

Logan's interview demonstrated that he had insight, which he generalised to the team and future leaders. Logan emphasises the importance of thinking strategically in order to create a future that is sustainable. This demonstrates an awareness of other people in reaching considered objectives. However, this focus has allowed him to avoid personalising his learning. Logan indicates that he has a self-confirming belief which Kahneman (2013) calls being blind to our own blindness.

He clearly has an appreciation of the importance of working in a team to reach an objective. He has indicated that communication during the BDAL experience caused the group less frustration and anxiety in comparison to other teams.

### **Charmaine's narrative: The importance of collaboration amongst set members**

Charmaine attended the SMDP as she thought it **would add value** to her. She discussed the programme with a Human Resources Consultant after which she was nominated to attend it. **I had decided I'm going to accept, even if it's not a good year for me, as I might not get that chance again.**

She found the drawing **difficult in the beginning**; she was not sure where to start. She went through her notes from the programme and the drawing became easier to do as the learning **stood out for me**. Most of her pictures focused on learning about

knowledge and changes she had made at the workplace, such as: **Diverging and converging to reach the desired state. How to do research and evaluate the facts. Systems thinking as I work in many complicated systems which impact on each other and ultimately impact on me. Any change has a ripple effect on everything around us – from our work to our personal and social life, big data and marketing. I realised that client centricity could be the game changer from a business perspective. I am now more focused on getting my business involved with charity work. I also encouraged the business to ask the question why.**

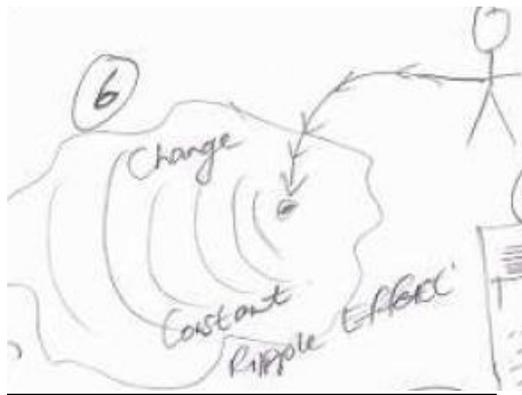


Figure: Ripple effect

Her first picture she called **Collaboration**, which was about the collaboration within the set. She drew a picture of a team with 6 members and one person leaving the programme (she was not sure why). When talking about the remaining team members in the set, she mentioned that **some people can't perform and that I had to adapt**. One of her set members did not perform in terms of meeting the BDAL requirements. **Can you believe it, she's (a team member) in a management role, she was not able to do it? She can't do it (the BDAL project). It's like she can't do it, she doesn't have the ability to do it. The whole team was very disappointed.** It was very frustrating. She said that to deal with this, she had to **continue by not allowing the person to influence her negatively. She learnt that with some people, you can lead them to water, but you can't make them drink.**



Figure: Collaboration

I had to interact with colleagues from various backgrounds, nationalities and countries. I'm a very individualistic person; my preference is to work as an individual. It was difficult to get everyone on the same page. I had to learn to work within a group. That was difficult for me.

It was interesting to see how the team's work cycle unfolded, namely: Forming, Storming and Norming. I learnt that although all of us are in management, our experiences and strengths are very different from each other. It therefore becomes important to focus on every person's strengths within the team and apply him or her accordingly. You need to get to know people when you're in a team. I enjoyed getting to know the people. We still keep in touch.

In group situations, she would sit back and listen to whose responsibility it is. I would help them or guide them, but I would make it their responsibility to do what they are supposed to do. I realised you can't do everything for everybody. Sometimes you need them to grow and do what they must do. Even if it takes longer than you anticipate.

That's what I've gained from the whole exercise. My team members confirmed that they saw a gradual change in the way I interact and collaborate with them. I definitely became more group focused versus individually focused. One of the big changes for me was not to take it and do it. I had to learn not to do that. Unfortunately, sometimes, I did do it. It's difficult to change if you're a perfectionist. Be a little bit more relaxed. Sit back and adapt to the other people's styles and adapt to their pace. The pace that they are working at. That, to me, was very difficult. I want stuff to be done now. For other people this is not always so.

A skill learnt was communication. Communication is very important, that's what I've learnt. Make sure that you are on the same page with members, that you understand what is expected. If you ask someone to do something or they ask you to do something, make sure that you've got the details. I've learnt to communicate better with people at work and in my personal life.

In the workplace, Charmaine had improved her communication skills and she was able to assist people in committees. She agreed to help them because I've got the experience but I am not going to do it (the work).

After attending the SMDP, she went on a mentorship course and is currently mentoring two people in her unit. It is working very well. I had very positive results from that.

**That is something new that I would never have done previously. I focus on being a mentor to someone.**

**I'm a driver so I had to learn not to be so driven. To relax a little bit and not force people, just talk to them, ask them to do the task and see what their response is. As a mentor, you can't drive people.** The action learning coach **was a very good mentor to us** as he gave them feedback.

Charmaine drew a watch in her picture as **time management played a crucial role in my life last year. It was difficult to juggle all the balls. I really had to plan very carefully.**

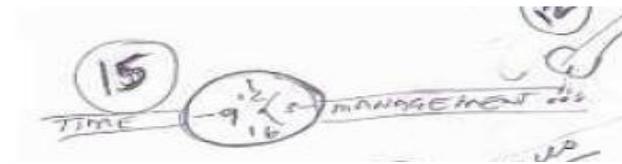


Figure: Time management

Her plans did not always work out, as set members did not always deliver on the expected tasks. She is now better prepared at work than she used to be. **I'm actually doing stuff that I didn't have time for in the past.**

The figure of the ripple effect is a picture that appeared to be a person fishing but in fact represents the ripple effect of change. **If someone changes something, it's got such a ripple effect to everything that you I do.** An example of this is she has been given permission to work from home. She is now able to think differently about her approach on aspects of her work and **I'm challenging people on certain stuff to make them think differently. I'm a conservative, structured type of person, I'm not open- minded. It's difficult to change if you're a perfectionist, and change to be a little bit more relaxed.**

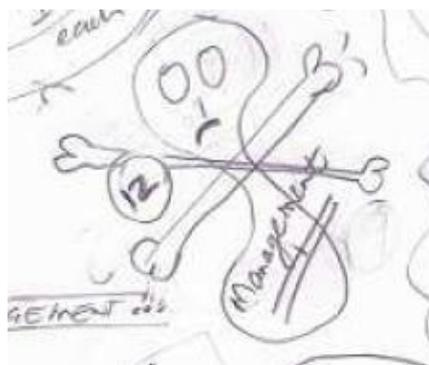


Figure: Management style

This picture is about management style. **Sometimes you think you know the best for people, but it's not true. They can actually come up with a better idea than you. Allow them to think. I had to learn that less is more. I enjoyed the SMDP; it added a lot of value.**

### Epilogue

Charmaine learnt knowledge based elements from the programme. The biggest impact was the importance of collaboration amongst set members in the BDAL team. She took this concept to the workplace and focused on changing her management style to one of getting input from team members. Clark and Wilson (1991) connect transformative learning to action by emphasising that the action taken is based on the meaning from the action learning experience.

### **Odwa's narrative: Growing in confidence to managing boundaries**

Odwa attended the SMDP **as obviously all the senior managers have done it.** That was not her only reason for her attendance as she was looking for **personal growth, development and to go through a process that will enable her to work at a more strategic level. Where you can actually make something tangible out of this process and apply it to your normal working day.**

In her picture, Odwa drew what **stood out for her in the journey.** She **drew what came to mind,** she did not **over-analyse** it, as she **really had to think about** what the picture should include. She had always been a **supportive person who supports others from a business and personal capacity.**

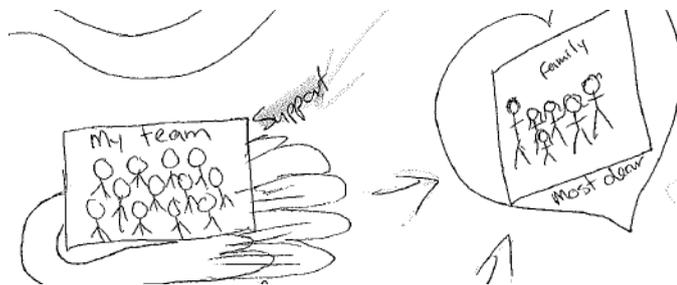


Figure: Support

**I am one who will always accommodate, accommodate, accommodate. Then I just said, you know what, this is it. Let's stop right there. I am no longer accepting this.** This journey of giving all she has to others had to stop. The people in her life did not like the fact that she had started to put boundaries in place. **People are**

**selfish**, and they **had hard feelings** and were **unhappy** when she was not **available** to help them all the time.

I learnt a lot through the process of the BDAL. The boundaries weren't always firmly set, because I always wanted to over-compensate. It was a challenge to set those boundaries a bit more firmly. I think I did manage to do this both at work and in the BDAL group. Especially now, I must say, a year on, it really has assisted me. At first, I would do something despite the fact that I know time is gonna be an issue and, really, I should be giving this to you to do. Now I've become a lot better in terms of setting those boundaries. It was a challenge to set those boundaries a bit more firmly. I find that I've come to the realisation that sometimes, it's not going to help. You can give a person so many chances, but it also needs to come from their side as well. They need to change.



Figure: Purpose

Odwa started the interview with the heading in her drawing "My Purpose." For me everything is about, what is my purpose? What is it that I'm here for? Before the BDAL, if you had asked me, I might have said my purpose is support. Everybody in my life and at work. I'm an enabler. But now, it's changed a bit. It is no longer just the support but also to discover myself and to build on that. To build the confidence, to build knowledge, to build growth.

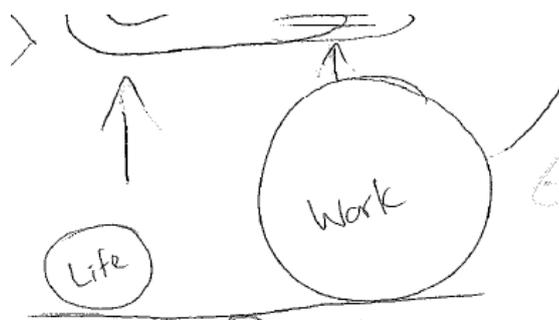


Figure: Life and work

In her drawing, she explained work life balance. **I've got the whole work life balance thing. That is a real challenge. The work ball is a lot bigger than the life ball. The BDAL took a lot of time. During the BDAL, you find that you're not always available to provide that support to your team. You must have contingencies in place. You do sometimes feel that you don't have a handle on things as you really want to. Trying to balance everything. It's taxing and demands a lot from you. If you don't sit down and realise what the impact is going to be from a time and availability perspective and consider how it will impact on your colleagues, your reports and your family, you can find yourself overwhelmed.** She did not find the BDAL overwhelming, she enjoyed it, as the process she put in place to manage it, **worked well.** In addition, she focused on planning and project management. **You have to take a step back and say how am I going to do this? Planning and project management starts from that point onwards. You have to agree with your family and your work team in terms of your availability, and your expectations of what they need to do for you. Your work does not stop just because you are working on your BDAL.**

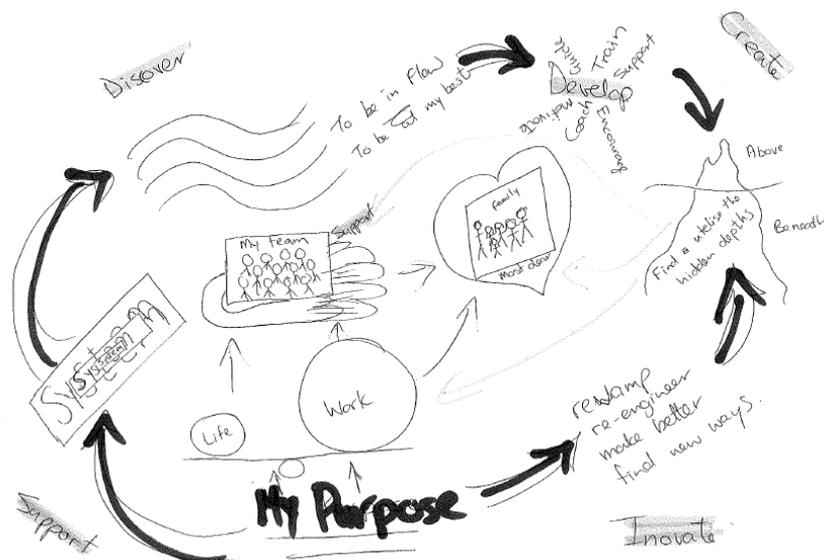


Figure: System

She drew her picture as a system, as within each system there is another system. **You can never go deep enough. It has also taught me the ability to question why. To look deeper, not just on the surface. So, when something happens, to ask why is that the case? Alright, okay, but why? Know how things are interconnected and how things are linked and dig deeper. There's always two sides to a story.**

She was able to consider this learning on her work systems and appreciate that **there are not just your stakeholders that you need to involve, there are all the other technicalities and you have to look at the whole process.** She found that this was beneficial to her and that **I've done something good. I have that ability, but I need to be able to hold on to that ability. To look at things holistically and consider the impact on other areas.** The picture, **it's about the journey, it's about what I've learnt. It's about how I've come through the process at the end of it.** Drawing the picture was about **revisiting, thinking about the BDAL again, what the journey means to me and how I have brought it into my current work life.**

She practised her systems thinking during the BDAL when **she facilitated group discussions around what we were doing, where does it fit in, what do we need to consider now, what else do we need to discuss?** This was **definitely a challenge, as everyone must understand that everyone will get an opportunity to be heard. Your ideas are not less important than mine.** Make team members understand that each person's viewpoint was just as important as the next person's. **We shouldn't discard anything until we've really discussed it and we can actually go that route. Get consensus around the table. Make them understand how important it is to work together as opposed to working against each other.**

The team had a **moment** where one of the group members wanted to withdraw. **He decided that he didn't want to be there. It was a question of pulling him into the group and making him understand that his contribution was as valuable as everyone else's. We actually needed his insight. It was that constant encouragement that kept him in the group.**

**I was a bit sceptical about the group at first. In the beginning, we were a bit wary of each other. I was thinking, I don't know how we're going to work together. Funnily enough, when we got to know each other, we actually found that we all had different strengths and weaknesses and we all had varied experiences, which we could draw from. We really liked each other. There was a high level of engagement and we were very comfortable with each other. There was a high level of trust.**

She found that **she is also a lot more patient. I am looking and listening to other insights and making sure that there is agreement. That all ideas were heard and considered.** She explained a work example on how she had shown patience with a new person who did not understand the business. **When he came in, I could feel the impatience, and why are you not understanding this?** The process that she used

was to break down his understanding in a step-by-step process. **The BDAL certainly assisted me to work through patience better. It is something that I have to constantly work towards, but I am much better. I handle it a lot better now.**

The BDAL also assists you with building confidence. I didn't have a high level of confidence but once you go through this process you do. At the beginning, all of us thought we are not going to be able to do this. It wasn't just the fact that I could do it, I enjoyed it. I wasn't just coping, I was enjoying it. She said she enjoyed it three times during the interview, and loved thinking on a **higher level.**

**It really boosts your confidence. The team looked to me for guidance and that in itself was a confidence-boosting thing. My biggest learning was the belief in self, that confidence thing. You don't have to use this in your story, but I'll share it with you, it's personal, but it has changed me so much. It has given me the confidence to stand up and say I've been in a relationship for a long time and now, this year, I have said I can't anymore. In just under two weeks, I'm going to ask for a divorce. I just want you to get an insight on the extent this has changed me. Something that I considered previously but never acted on. Now I have acted on it, I know I have done a disservice to myself and realised I need to move on. This is similar to my work environment. Knowing when to say you need to move on. Knowing when you know, something's gotta give. To know what you can take out of this experience.**

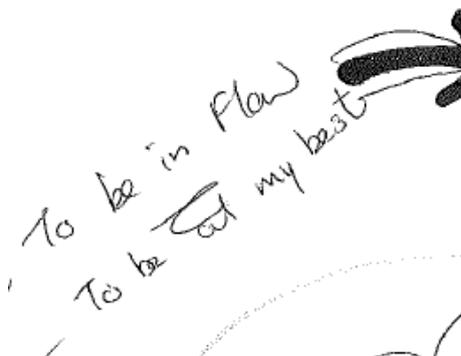


Figure: In flow

In her picture, Odwa wrote: **To be in flow. To be at my best. The flow thing I really love. That's an 'aha moment'. To give of your best you need to be in flow. I want a challenge, a project, I want something that is going to occupy my mind and push me to my limit. I do think I am more in flow now.**

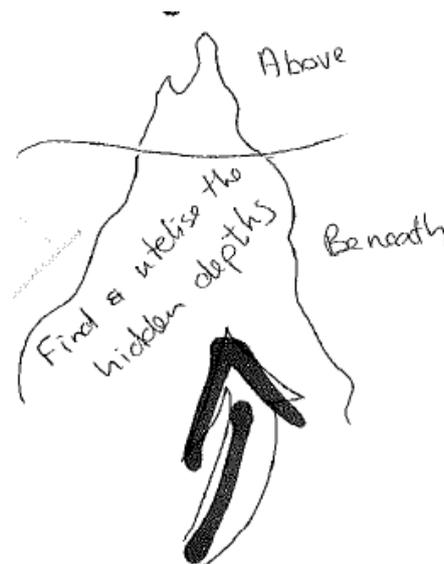


Figure: Iceberg

She drew an iceberg in her picture to represent **the hidden depths**. Obviously, there is a lot more that I will be able to do. To push and encourage going forward. I just feel I want to explore more. I want to uncover all these hidden depths.

In the beginning of this story, Odwa mentioned that she wanted to attend the SMDP to work on her personal growth and implement it from a strategic level. **I have definitely grown and now able to work on the next level, but I don't think it is something that stops. This will always develop and I need to adapt. I don't think this is something that stops.** She wrote the word discovery in her picture, which speaks to the iceberg. **There are all these other things that I still want to explore. Really, create things. I have the view that anything you set your mind to do, you can do. I think the BDAL process has changed me. It was a gradual change. An open-mind change.** Her work environment had also changed and this change in structure enabled her to manage so much more and to be in control of so much more, to manage it optimally.

### Epilogue

Odwa's story illustrates lasting changes that she has made in her personal life. Transformative learning goes beyond behavioural change, as it challenges existing beliefs and ideas, furthering the reconstruction of meanings and a more radical paradigm shift (Palma & Pedrozo, 2016). Odwa's story indicates that she has been involved in a radical paradigm shift. Taylor (2000) summarise that emotions and

relationships contribute towards transformative learning. Odwa shared stories regarding her emotions and relationships regarding her personal and work life.

Her picture suggests that she has taken the next step in her development and can see her world from a new perspective. Her picture represents evidence that critical self-reflection, reframing has taken place, and both these elements have been linked to transformative learning (Mezirow, 2000).

### **Mark's narrative: Be free in my own ignorance**

Mark volunteered to be part of this research for **educational purposes and to generate knowledge. I want to help others grow as individuals.**

He attended the programme as his **boss thought it would be good for him.** He wanted, and still wants, to complete his master's degree. His expectations of himself during the programme were high, **you can sink or swim during this process and I chose to swim.**

Initially he found it stressful working in a group of people with different backgrounds. **In the beginning, the BDAL was stressful as everyone has an opinion, even though we had no clue. If you look at my group, we were all, with the exception of one person, heads of departments. We had a lot of bulls in one kraal. We were bound to have a lot of fireworks. This happened in the first two weeks, or so, of the interaction, as we wanted to draw the line and cast the vision. I think, as we progressed, less and less of us imposed ourselves on others. We listened to what others really had to say and appreciated that we didn't know everything and by listening, we learnt that we had to be very clear when we communicate. With that, it allowed us to synergise better as a team and look beyond our own responsibilities, drop our guard, and expose the softer side of ourselves to a group that you felt ultimately were your brothers and sisters.**

**We enjoyed each other's company. For me, I learnt to draw the line in terms of tolerance. I had to learn to read peoples' expressions, their body language, listen and attach this to certain feelings, knowing that the person ultimately understood their intent.**

The leader of their team was a lady, and she brought a formal structure to the team. **The team had to be reined in. This worked as people let go of their egos and acknowledged her and allowed her to lead them in terms of the structure, direction and effort.**

He learnt to be **fluid within the BDAL team** and has also applied this learning at work. He was able to **adapt quickly, irrespective of the environment. I realised my strengths and other's strengths during the BDAL.** He was able to **adapt with an intention of making things better.**

In his picture, he drew a circle and a rectangle. The circle represented the informal environment where participants could be more relaxed. The rectangle represented the formal structure, which showed the team had synergy. Both these environments were dynamic and ever changing to meet the needs of the world of work. **They are separate but in contact with each other. This is how I want things done, I want to know where to draw the line and yet show these two elements as being one. I want to be able to do things to get the best results, I want the formal environment and the informal set up. Allow you to speak your mind, to speak freely and laugh but to be open and honest with each other. A dynamic environment. We had this environment in our group. We could draw the line from laughing our lungs out to putting pen on paper.**

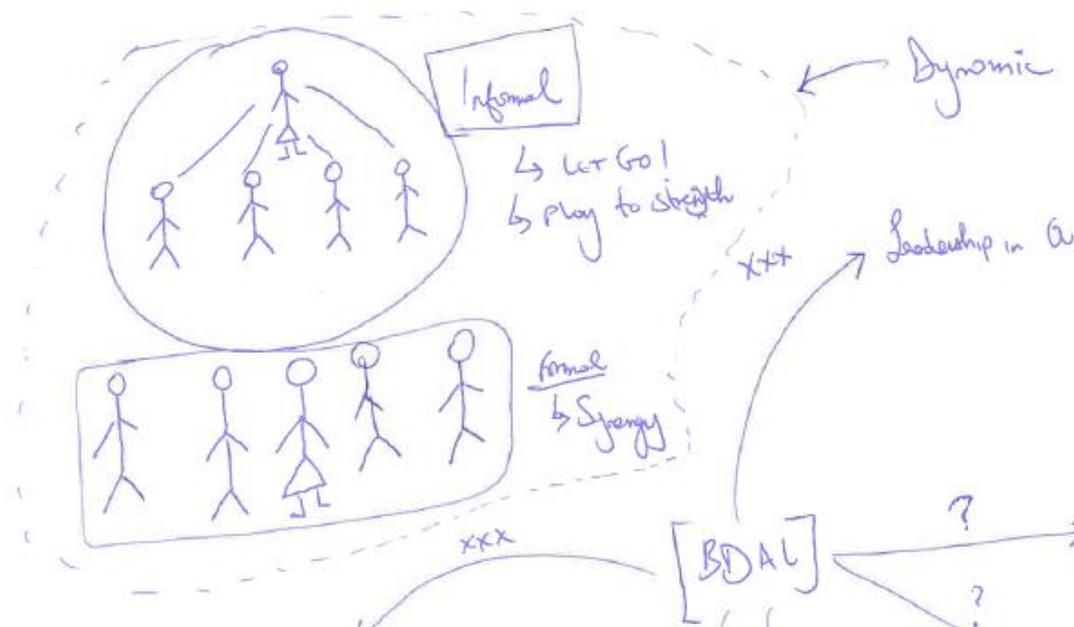


Figure: Informal and formal environment

He mentioned that he was an extravert four times in the interview. He had to be **careful not to step on toes.** He learnt to **draw the line on how far he could push people and when they had reached their tolerance level by reading body language, tone and ultimately understanding others.**

Due to his extroverted personality, the BDAL taught him to **manage himself around situations back at work. Back at work, I had to pitch ideas in the context of peoples' situations and show appreciation that you understand them.**

**I learnt that when I am not familiar with a topic I get extremely uncomfortable. I tend to withdraw, and my confidence levels dip. There is a reason why I say that. I have been in my role of 12 years, but the core of the business remains the same, so I am not exposed to big changes that warranted me to learn drastic change. The BDAL threw me into an environment where I knew nothing and where I am unfamiliar, making me uncomfortable as I don't want to come across as being dumb or stupid or not having my facts straight. I realised that is how I am when I am faced with new things, which I need to understand quickly. I have learnt to expose myself more to things that I don't know, so I can learn to handle myself better when this happens back at work.**

**The BDAL allowed me to be free in my own ignorance and learn better. I have applied this learning back at work. This has allowed me to be more innovative. From this learning, I have optimised the value chain back at work. This allows me to learn and ask more questions rather than being cautious and scared. I am free in my own ignorance. It allowed me to be more innovative as I look at things differently.**

The action learning coach was frank and observant. She picked up that he did not like not knowing, she realised that he asked questions in a manner that was too direct, **she made me realise that learning is a slow process.** He had to unlearn how to be comfortable with the unknown. He had to unlearn habits and try to do things that he was uncomfortable with.

**What I really learnt is that it is not management or leadership and you should be able to transition between the two, as the business is dynamic. I should be fluid in my approach in doing things rather than being stuck in one way of managing things. I learnt to adapt quickly, I didn't think I could.**

He learnt the following about himself: **knowledge about myself that I adapt very well and quickly, irrespective of the environment. I look at the environment and look at where my strengths can help and then I look at where others can help. I have the intention of making things better. People usually change if they feel you are one of them and you want the best for them.**

**The BDAL process allowed us, forced us to look at family, work and, suddenly, you had studies to take care of. Before SMDP, you had an easy dynamic between**

**work and home. Now it forced me to look at the three factors and how to still function at work, how to make sure I am a loving husband, and how to excel in my studies. It meant a complete routine change for myself, and I speak for myself, I don't like routines to be changed too much. I found my groove. I had to tell myself none of these three things is negotiable. The only person, who could make sure that all three things were a success, was me. I had to make a choice to make it work. I found means to make it work.**

**BDAL is an opportunity where you learn to understand your experiences in the context of other peoples' experiences. He was more conscious of my abilities, my EQ and I can turn anything I want into gold. I used to make excuses that I will not achieve if I don't have a proper team around me (people who come from diverse environments), diversity creates better results. Right now, I am serving my notice, as I am going into business. That is my passion. The BDAL was the cap on the passion that already existed.**

#### Epilogue

After experiencing the BDAL process, he felt that he **couldn't be the same person** as he **had changed**. "Anytime we learn something new and absorb it, either through life experience or an educational event we are transformed in some way (Dilworth & Wills, 1999, p. 76). Mark showed appreciation of the value of working in a team; the process taught him this about himself. His personal learning indicated that a shift had taken place. He showed clear self-awareness regarding his learning during BDAL. Working in a group of peers on a problem he was not familiar with, helped push him out of his comfort zone. He indicated that he recognised this and now actively looks for these opportunities at work. Mark's comments indicated that there was a shift in his frame of reference and that the action learning coach contributed to this shift. "There was opportunity for the action learning coach to emphasise potentially transformational elements which could share or determine the initiation of moment of transformational learning" (Ajoku, 2015, p.8).

#### **Sam's narrative: Understanding myself**

Setting up this interview was a challenge. Firstly, the interview was postponed. Secondly, the medium of communication between the two countries was a challenge as the line was not clear. Lastly, the difference in actual language meant that the chosen words were not always clear on the telephone line, as this participant spoke

French and the researcher English. However, once these logistical issues were sorted out, Sam shared his thoughts in an authentic manner.

He chose to be part of this research as he **is interested in contributing to humankind. I like education and discovery. I like to help others; the programme will help me make the world a better place.**

In terms of the drawing, he was initially **confused**. He felt that his BDAL experience consisted of multiple stories not just one. The BDAL experience was about different experiences, which created four stories for him, hence the four different pictures he drew. **Drawing the picture allowed me to focus my mind on the events from the BDAL. I don't have the best memory and the pictures helped me to relive the moments and give depth to my story.**

He chose to attend the SMDP, as he wanted to improve his leadership ability. **I want to be the best kind of leader and add value by being a good leader. Those who have attended the programme before mentioned that they see life from a different sphere and that is something I would like to experience.**



Figure: Success

**I felt that teamwork was the key to success** during BDAL and he drew this in his first picture. **Different people come together from different demographics; I saw an advantage in that which I have not seen before. It was a good experience.** Team members with different options often cause conflict within the team. However, this team was able to manage this as they **agreed and aligned goals. As long as everyone spoke towards a common objective and we all understood the objective, we did not deviate from the end game.**

In the second picture, Sam drew different options, which lead to better ideas.



Figure: Better ideas

**We managed the different opinions by having ground rules in place and we put these in place before we met as a team. The ground rules guide us so that we were all aligned. This helped, as we were a team of peers. When working in a team of peers you need to be more diplomatic. You are not the manager so you can't tell the group that something needs to be done. You need to get everyone aligned.**

**The teamwork challenged me in terms of dealing with the different opinions but I managed this by keeping all the ideas in a box and finding common ground between the ideas.**

He was able to apply this learning in the workplace. His training requires structure in what he does, so it was **easy to align what I have learnt from the BDAL. I structure what I am doing and also accepted that I should be open to different opinions if I want solutions. That has helped me in my workplace.**

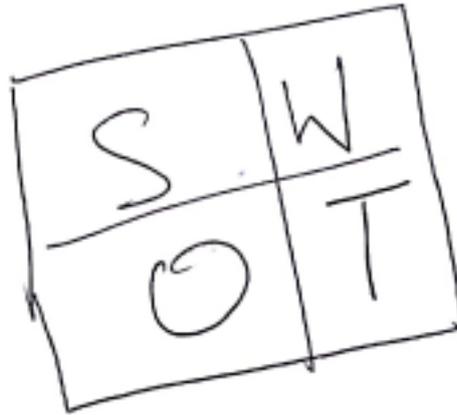


Figure: SWOT

He also adopted introspection in terms of his behaviour. **When I am having a conversation I never talked, that was how I interacted with people at home and at work. I choose my words carefully and the BDAL experience brought that out because I don't spend time talking to people. The BDAL took me out of my comfort zone. I needed to interact with people and I realised the personality traits I have. It opened me up to the SWOT analysis and I looked at the SWOT in terms of myself - my own strengths, weaknesses, opportunities and threats. How my personality traits could be an advantage and an opportunity for me.** The SWOT is not only a tool that he applied to the BDAL project, but also a tool that he applied to himself and his personal behaviour. He believed that the team should have aligned this tool in terms of their capabilities.

He was given new responsibilities at work, which required him to be more vocal. **Understanding my personality traits, I don't like to be the first person to talk. In the new situation and new environment I find myself in, I talk more. I have been able to adjust and make the best of it.**

He has become more aware of his personality. **I am aware of my personality, as I used to be very rigid and inflexible in terms of how I perceived things. I used to take life too seriously. The BDAL experience made me feel there are other ways to get what you want out of life without being so serious. I used to work with caution. I used to like to work with people with the same work ethic and that they take work the same way as I take work. For example, for more than 10 years I was the first person in the office. I am always punctual. I like people with the same level of discipline. The BDAL allowed me to consider people, as everyone brings something different to the table. This does not mean that people can't**

deliver if they are different. That is an insight I got from the BDAL experience, it allowed me to treat people better.

The workshops were an epiphany for me and I understand that I needed to rebrand or re-craft myself for my career. The good thing about the workshops was that you get to use your learning from the workshop when you meet with the BDAL group. Being friendlier, finding touch points and simply having coffee with someone opens more doors than sending an email.

Procrastination was the biggest frustration for him. Lastly, he drew a picture of procrastination, which was a major detractor to the progress of the team. He drew the BDAL in a book format with the saying tomorrow, tomorrow, tomorrow. What was most profound was that almost everyone, at one point in time, had to deal with procrastination. In terms of the BDAL work, we kept on postponing and everyone had an excuse. We thought we had a long time to complete the project and we did not complete enough research when we had the time. Tomorrow, tomorrow, tomorrow made the BDAL work sad. Personally, I am always on time and structured so I found the procrastination within the team frustrating.

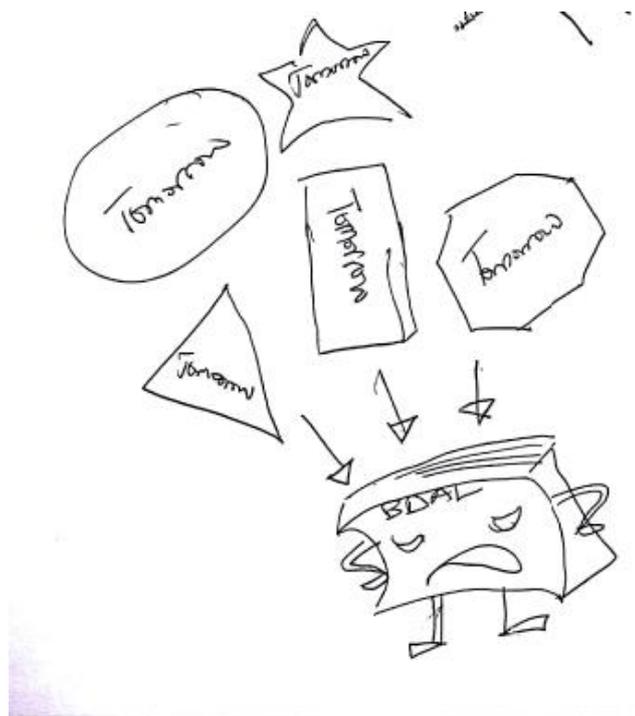


Figure: Tomorrow, tomorrow, tomorrow

**The presentation was the biggest event and created tension. I still don't understand why. The group worked like we have never worked before, which is good and bad. Good as the work was done and there was an investment in terms of time and thinking. Bad as we could have prevented the last minute stress if we had not procrastinated in the beginning.**

At the start of the BDAL, he was excited, as it was a new adventure for him having to interact with different people from different locations and different countries. At times, it was frustrating for him due to the procrastination and this discouraged him. **I am someone who is timely. I had to understand that people sometimes had other personal or work issues that prevented them from meeting the BDAL timelines.** He realised that he had to compromise to get results.

**At work, I think I have changed my behaviour because I learnt that being a leader requires different skills as opposed to what I thought initially. I have more interpersonal strengths than I had before. These include, communication - I am quicker giving compliments. That is something that I have learnt. I have also learnt to understand people's profiles so I can understand and appreciate my interaction with them. We are all different and once you appreciate that fact, you are able to have a more productive conversation or interaction with people.**

His work colleagues have mentioned that he is a lot more relaxed. **More of a people's person than I used to be.**

**Overall, the BDAL experience leaves you feeling more like a leader and an understanding of what is expected of a leader. It was a good experience.**

### Epilogue

Sam talked about understanding what is required from him as a leader, and this is not what he expected. "Learning is as much about unlearning old misconceptions as it is about acquiring new ideas" (Land, Rattray & Vivian, 2014). This BDAL team seemed to manage the power balance amongst their peers effectively. There was opportunity to explore power at the "me, us and them" levels, which ensured that learning was embedded (Pettit, 2010, p. 31). Sam commented that he has improved the way he interacts with others as he noticed that he speaks more but also considers other's viewpoints. This showed that a deep-seated paradigm shift had taken place within the existing paradigm (Palma & Pedroza, 2016).

### **Rhys' narrative: New experiences and a positive outlook**

Rhys volunteered to be part of the research as one of his syndicate members asked him to participate. **She nagged me to be part of it.** These two participants still communicate a year after the programme.

Rhys found reflection challenging. **I battled to reflect. I started the drawing with words then I drew the pictures. I will do it, but to go back and say what the specifics include are difficult. I come from an analytical background. I battle with these types of scenarios.**

**I had a good experience during the BDAL. I had some amazing moments, but this is difficult for me, I have the creative side but for me to specifically say when and where and how is difficult as I am more of a broad picture guy. I don't reflect at work, because we deal with instant actions and we run with it for a certain period, we don't reflect, I am bad at reflection.**

Rhys was nominated to attend the SMDP programme three years ago but he declined, as it was not good timing for him. He then chose to attend last year with the support and encouragement of his line manager. His line manager played a huge supporting role in the programme by managing his workload while he was on the course. His manager also asked Rhys for input back at work, as he is the only person in his team who has attended this programme. **I am the only one in the unit who has done this course. I was nagged by my line manager, she actually asked me 3 years ago to do it but I used an overseas trip as an excuse not to go. One of my friends in Johannesburg did the course, we are very similar, and I could get a better idea in terms of impact on my time and family. He had an amazing experience. I said I will do it. I was so glad to do it, as it was really a good experience.**

**You have to have the right mind-set to do the BDAL. I worked hard; I prepared my family for the time it would take.** Rhys also spoke to other people who had attended the SMDP in order to understand what they experienced, what the outcomes were and the impact on their time. **It was an amazing experience and I am glad that I did it.** He mentioned four times during in his interview that it was a good experience.

He also found the BDAL experience helped him change his perspective on the world. The interaction he had with people outside of the business and country was a humbling experience. **BDAL was interesting. I had a change of perspective during the BDAL.**

Rhys drew this change of perspective in his picture of Africa. He thought that he knew how to solve the business challenge and that he had the answer to this problem; however, upon further investigation he realised that there were other considerations he had not thought of.

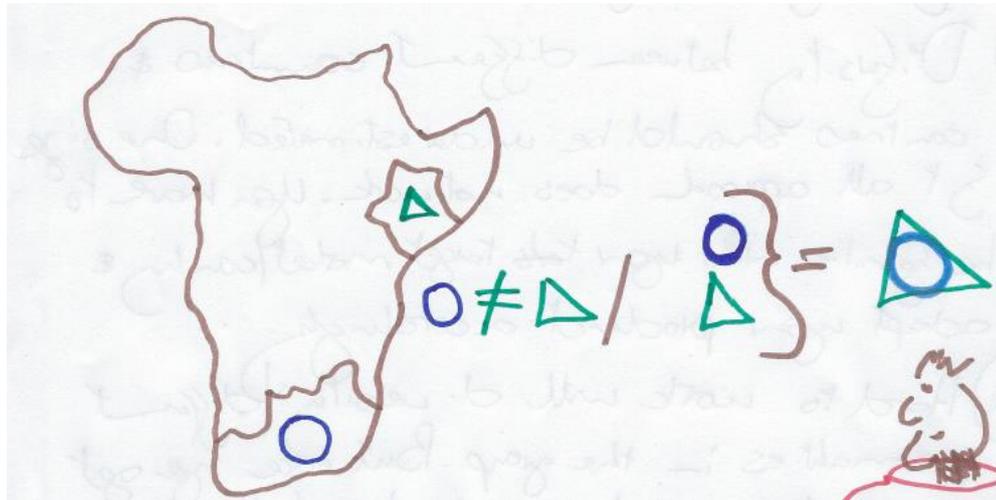


Figure: Other considerations

**The topic was my idea and I already had the answer. But as soon as we started the investigation I realised there was just no ways my solution would work, that is why I drew a circle and a triangle to show it is totally different. It was a humbling experience and we did come up with an amazing solution. We were forced to look for something that was outside of the industry. One assumes a lot, I am so specialised, I had a superior approach in terms of business in terms of what can you really teach me. Yes, you might have an amazing system, but if you fly up north, it might not work there. That was humbling, I had an arrogant approach in what we do and I realised that. It was about changing perspectives.**

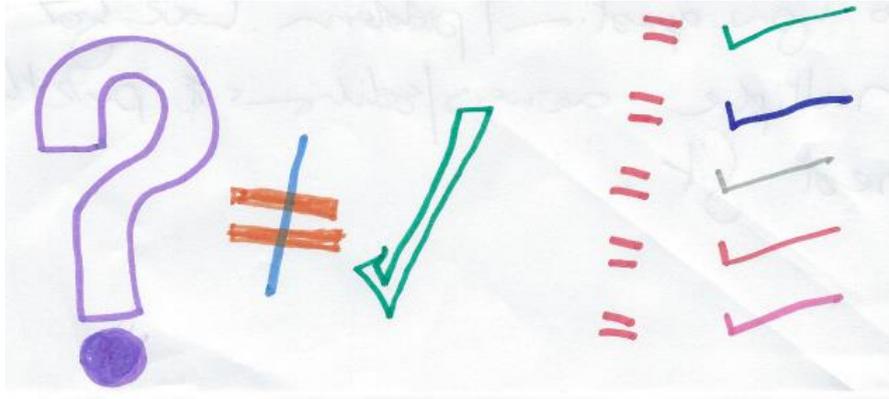


Figure: Changing perspectives

He drew different coloured ticks in his picture to illustrate different possible answers. **It is all about the single-minded approach. If you have a problem there is not a single answer or solution, this is something that I have also taken into my personal life. In fact, in the above problem, there are multiple options and that is why I used different colours for the ticks. The answers are different and all my be applicable to the problem, but don't limit yourself to only the one green one, there might be a grey or a purple one and then you need to reflect in terms what would treat you best.** This thinking is about multiple perspectives and multiple options to solving a problem.

Rhys' picture shows how strong his team had become by the end of the programme.



Figure: Strong team

He drew 4 people coming together to represent one strong person. **Initially it was a struggle with the group because we were so diverse in terms of personality, in terms of how we work and our presenting styles. Obviously, they do this on purpose, but you come to realise that you need to move past the conflict and concerns of each person to achieve the end result.**

He used the metaphor of the table in his picture. **Each person brings something to the table and once you know that, you can really tap into the different aspects each person brings. Then you are a formidable team.**

They were a formidable team as they managed their differences and conflict. **We were diplomatic. There was conflict between me and one of the other team members, but we still keep in contact with each other. She was the one who brought the most information to the table, but because of the information overflow, we had to decide on what can be included and what to leave out and this caused conflict between us and the rest of the team. Yes, there was conflict, but there was nothing that we could not resolve.**

One of the team members did not contribute to the team as much as the others. **The reason for her lack of contribution was that she was very busy at work and during our two hour meetings every week, her manager would ask her to deliver work and she had to leave the meeting.**

BDAL taught Rhys to **embrace diversity and team dynamics**. Rhys has also applied this learning back at work. **Going back to my own work team, we are all senior people and everyone is opinionated. After this BDAL experience I realised one of the concerns is that my direct manager has made comments about introverted team members. But the fact that they are introverted does not mean they are not contributing, they are just taking time. I am an extrovert, I talk while I think. It is important to realise that you need to give people sufficient time to give feedback or a specific answer.** Rhys has now tried to give other people the time and space to contribute to discussions.

Rhys also experienced frustration throughout the programme. **Initially I was frustrated because I run my own portfolio. I run things my way and working in a team, you have to sit down and really listen to the opinions of your colleagues. There was also a lot of frustration in terms of what we should do as we also had a problem of some people not doing their part in terms of the work we were doing. By the middle of the year, we started to gel as a group as we got to know each other, I don't think we would necessarily become friends because of the underlying conflict and because we are so different. Frustration is a continuous thing right up until the presentation as there are always quirks and traits that irritate people, but the group had come together in terms of what we were required to do that helped a lot.** This group showed that they were able to work together towards a common goal, which helped them make progress.

On reflection, Rhys would not change the way he interacted with the team. **If I were younger, maybe more open communication, but because you want to maintain the peace, you restrain yourself from saying things outright. However in the real world, it is better to think twice about saying what is on your mind rather than acting with emotion, so in terms of what we learnt and accomplished, it was amazing.**

Even though Rhys felt frustrated at times, he focused on being positive during the experience. He has also managed to maintain this positive energy throughout this year as well. He concluded that he is now more positive in his overall outlook. **The positivity was one of the things. Be mindful of not losing heart and steam. If you perceive BDAL to be a massive thing, don't lose the end focus of why you are doing this, be mindful of remaining positive as a lot of people do get bogged down. If you are negative, it is a waste to do this.**

Since attending the BDAL, Rhys' key learning was to create new experiences for himself, which he has managed to implement in his personal life and to a lesser extent at work. **The workshop discussions that came through in the BDAL and specifically for me, were about new experiences. I apply this in my personal life, go out and have new experiences as it opens up new windows in your brain. It will trigger in terms of doing something new. In my case, I went to the States; this was something new for me. I have a friend there who I went to visit. I get emotional about it. Not sure why I am getting emotional. We get to the end of the year and say it has been such a bad year. To stop this, I have been creating wow moments and have kept a memoir of hi-lights in a diary during the year, which we can recall and celebrate.**

The BDAL has also taught Rhys additional skills. **Project management and planning. I am terrible at planning, as I am an impulsive guy. In terms of my personal life and work to some extent, to try and plan better in terms of my day and my future.** He has also started to read more. **I am someone that loves reading, I have learnt to start using the flip board app, where you can pick different topics and then on a daily basis the app loads articles in terms of the topics that you choose. I am also someone that does not follow the news, but funnily enough, I have put the news articles that we were reading on flip board and I am now reading wider in terms of technology, world trends and things that interest me in a wider sense. I am still using it this year but am battling to get used to reading fiction books.**

**Rhys is also more conscious of opportunities. Opportunities in the sense of what is available out there. Taking a broader look in terms of what is happening from a work point of view, a wider point of view, and the impact for the company and the client, both converging and diverging options. We tend to focus on specific detail but need to go out and look at the wider picture. The action learning coach wanted us to focus on the detail but also to take a few steps back and look at the bigger picture. This we did as a team.**

Rhys is struggling with returning to work and is questioning whether he should make a career change. **The BDAL experience was so innovative and new, you see all these opportunities out there and this makes it difficult to go back to a mundane routine. I am at the point in terms of should I be doing something different, I still have a good career ahead of me and now that BDAL has shown me what opportunities lie outside of my unit; I have to consider alternative career choices.**

### Epilogue

Rhys learnt the skills of project management, planning and convergent/divergent thinking, however key to his learning was to embrace a positive attitude so that he could try new experiences. In addition, he learnt about team diversity and how to get the best out of team members in order to reach a common goal. He is starting to see that there are different opportunities for him and he is weighing up his career options.

Rhys had a change in his mental model while working on the BDAL topic. He thought he understood the BDAL problem but came to realise that there are multiple solutions. It is evident that he is challenging his existing beliefs and ideas to reconstruct meaning (Mezirow, 2000). He has shown that he recognises his assumption on the business problem and has revised it (McNaron, 2009). There is evidence of critical thinking, which replaces his worldview (Mezirow, 2000)

### Appendix 9: Feedback on the use of interpretive stories

Participants in Phase Four provided feedback on the relevance of using interpretive stories as a learning tool from new participants who are starting to work on BDAL.

Table: Feedback on stories as a learning tool

Participant	Feedback on using stories as a learning tool
Participant 1-P5	<p><b>Relate:</b> “Learn from others: It’s important that you unlearn and learn all the time, this usually happens when you’re open to learning from others.”</p>
Participant 2-P5	<p><b>Relate:</b> “The story is very relatable to some of the members in our team. Sandy’s story is a reflection of a combination of many members, including me, because we all come from different backgrounds and opinions. The story (and the others you have shared) have placed our thought-process into context that ‘everything is okay’ and that the way we feel isn’t because we feel inadequate but that the process is supposed to push us to be the best we are supposed to be and that we are only human after all.”</p> <p><b>Comfort:</b> “I would like to thank you for sharing the stories with us and making us aware that we aren’t alone in the process and that we all have our mind sets of what should and shouldn’t be on this programme.”</p>
Participant 3-P5	<p><b>Tips:</b> “I personally believe stories like this can help future students to:</p> <p>Free themselves from previous limitations. Help to develop your own elements for personal growth. Following your own path to enlightenment. Validate ideas that have not materialised yet. Develop an awareness of your surroundings. Get to know people, their culture and circumstances that surround their everyday lives, which may be very different to yours. Develop the mental tools to push through the difficult times. Motivate themselves as the full benefit of the course may not be realised at the start if the programme. Overcome their doubts and insecurities when first starting this course. Realise that these skills are not only important in business but in life itself.”</p>

<p>Participant 4-P5</p>	<p><b>Comfort:</b> “The individual’s story is relatable, the challenges they face, and the insecurities they have. Knowing someone who shares those challenges with you and was able to complete the programme and grow through the process provides a level of comfort that you can do it too.”</p> <p><b>Tips:</b> “Things that would be of importance for instance making time to reflect and noting down those reflections. Good tip to not just go through the motions of the programme i.e. attending class, completing assignments etc. but ways to add richness to the learning experience.”</p> <p><b>Expectations:</b> “Stories allow you to see the practical aspects of what the programme will be like beyond the learning outcomes. It gives you a real &amp; raw idea of the programme being tough, the amount of time needed, the ugly moments as well as the joys of growth.”</p>
<p>Participant 5-P5</p>	<p><b>Comfort:</b> “For me the attached experience that Sandy went through further affirms that we all have perceived weaknesses, mental modes that we grow up with. I call it inherent sense of inadequacy resulting from life experiences, societal standards etc...but the ability to convert this negative energy by reflecting encourages insights and complex learning which will benefit a group/team, the BDAL offers this opportunity.”</p> <p><b>Tips:</b> “Reflection in this case meant that Sandy could step out of her perceived weakness, apply experiential knowledge she had amassed over years to a group thereby affirming her role in the team. The summarized lesson here for me is not think small of yourself but have confidence in your vulnerability as this process (BDAL) will unlock platforms that enables lateral knowledge sharing and learning from both sides. Always ask, “How can I get the most out of every platform I find myself in.”</p>
<p>Participant 6-P5</p>	<p><b>Comfort:</b> “I really enjoyed the story thanks. Initially when I started, I wasn’t sure what to expect, I was met with mixed feelings of anxiousness and excitement. Whilst reading Sandy’ story I was smiling a few times as I could resonate with the things she described. In general, I am a control freak and like to know exactly what is going to happen, when and how. I got sort of an outline of the program but did not know exactly what it entails, which to be honest totally freaked me out.... I kept on hearing the words “It is a journey.” It is stories like Sandy’s that helped me through all of this.”</p>

	<p><b>Expectations:</b> “If it wasn’t for stories such as these I wouldn’t have known more or less what to expect and get a better understanding of the journey ahead. During times where I was frustrated and felt like a bad person and failure for being frustrated, the stories shared assisted me and reminded me that what I am experiencing is normal. Furthermore, the stories also prepared me that stormy times lie ahead as I am not one for conflict. The stories prepared me for it and when it came, I could remind myself that everyone else also went through it and that I should embrace the whole process and take from it as much as I can. Like Sandy I also felt overwhelmed as I do not have any business experience and the business lingo the people were throwing around (especially during the first study school) made me feel as if I will not add any value. The stories once again just put my mind at ease and taught me that it is not about your background and how much you know, but about how much you really want to embrace the process and that you are ultimately only competing against yourself.”</p>
Participant 7-P5	<p><b>Relate:</b> “I could relate in particular to the lack of confidence and self-doubt/ limitation, and how the programme facilitates personal growth and builds confidence, as well as the powerful impact of reflection. Further, you have perfectly positioned that the programme has far-reaching effects; it does not just open your eyes to the work environment, but flows over into your personal life and how you choose to apply learnings in your everyday life / personal interactions. In addition, I love that it states choice, ultimately you can participate and walk away the same person, or you can choose to be ‘the better version of you.’ The narrative is brilliant, as it has put into words so much of what my thoughts have been about the programme.”</p>
Participant 8-P5	<p><b>Comfort:</b> “When I started I was honestly terrified of the people around me, horrified from hearing about the journey ahead and hopeless because I doubted my ability to actually get through this programme. I looked at everyone around me and felt extremely under qualified and out of place. The first time I read the stories you provided in class, I smiled. I smiled because the previous students all described the same feelings I had. They all began with the same anxiety, confusion and self-doubt, however all of their stories ended positively and to be blunt “no one died.” It has the helping hand I needed and gave me a sense of hope and relief. I also became excited as I was curious to get to the end and find out in which way this would have changed me as well just like in the stories, I wanted to know what my ending would be.”</p>



<p>26. Fear                  27. Frustration                  28. Goal on why attended the programme                  29. Inhibitions                  30. Introspection                  31. Judging                  32. Mental models                  33. More open                  34. Negotiation for common ground                  35. No buy in                  36. Open to new learning's                  37. Perspective                  38. Pre-conceived idea                  39. Realisation                  40. Reflection                  41. Relationship management                  42. Remove the lens of judgement                  43. Resilience                  44. Respect                  45. Rules of engagement                  46. Scared                  47. Self awareness/                  Finding self                  48. Sense of accomplishment                  49. Shift in perception                  50. Socially aware of her surroundings</p>	<p>17 Challenging                  18 Defence strategy                  19 Coach gives and receives feedback                  20 Coach questions                  21 Journaling which creates a deep levels of learning                  22 Frustration                  23 Multiple perspectives                  24 Patient                  25 Clicked, realised, remember,                  26 Accelerated learning,                  27 Own behaviour impacts on others,                  28 Learning through the team                  29 Trigger was external</p>	<p>understand others                  9 Comfort levels during reflection                  10 Moments of insight</p>	
<p>51. Stretch                  52. Struggle</p>	<p>30 Out of depth                  31 Group of peers                  32 Power</p>	<p>11 Control and unease                  12 Let go of control</p>	<p>3 Need for sense of control</p>

<p>53. Out of comfort zone                      54. Success                      55. Taking responsibility                      56. Time management                      57. Trust                      58. Uncertainty                      59. Vulnerable/Vulnerability                      60. Want to learn                      61. Willingness</p>	<p>struggles                      33 Share work                      34 Give over control to get control                      35 Competition                      36 Vulnerability                      37 Diversity                      38 Gender                      39 Empathy/doubt /fear/frustration /joy                      40 Growth/stretch                      41 Individual agency                      42 Too polite                      43 Avoid confrontation</p>	<p>13 Show vulnerability                      14 Intense emotions.</p>	
	<p>44 Interaction                      45 Frustration                      46 Opportunities                      47 Courage                      48 Arrogant,                      49 Convergent and divergent thinking.</p>	<p>15 Deep-rooted assumptions                      16 Open to possibilities                      17 Change in thinking                      18 Show respect for others</p>	<p>4 Gained multiple perspectives</p>
	<p>50 Painful                      51 Questions self                      52 Searching.</p>	<p>19 Positive shift in self                      20 Different person due to self-confidence                      21 Search for purpose.</p>	<p>5 Gained self-awareness and confidence</p>

## Appendix 11: Peer reviewer two

A second peer reviewer was invited to read and interpret all the case data gathered for this present study. The reviewer was carefully selected on the basis that she:

- holds a PhD in Organisational Psychology that employed both qualitative and quantitative research methods;
- holds a Master's degree (with distinction) in Organisational Psychology that employed qualitative thematic analysis;
- has over 30 years academic teaching experience including 15 years at a local business school; and
- has facilitated the learning process of at least eight group BDAL projects each year for the past 10 years during management development programmes.

The peer reviewer was given the data known as *storying stories* after it had been written up by the researcher to include each participant's story. She had the primary research question and sub-questions and asked to read each case to identify evidence that individual transformative learning had taken place during a BDAL management development programme. She was asked to remain mindful of Hoggan's (2016) typology but was also open to identifying any new categories of change should they emerge.

The peer reviewer read each story and offered the following summary of her interpretation:

Table 4: Primary and secondary learning.

Participant	Primary Learning	Secondary Learning
Prisha	Main learning for Prisha was about SELF, specifically her <u>view of self and self-knowledge</u> . Her need for control of her own environment and her subordinates was contributing to her feelings of stress. This insight to 'let go' impacted on her BEHAVIOUR	BEHAVIOUR that has since changed is in line with more strategic thinking (stepping back). Her <u>actions have become consistent with new perspectives</u> gained by becoming less stuck in the detail and more considerate of others and more patient ( <u>social action</u> ).
Fatima	Main learning for Fatima was about SELF, specifically her <u>view of self and a sense of empowerment</u> that she got	Her BEHAVIOUR has changed back at work in that she manages her stakeholders differently ( <u>professional practices</u> ) and reports having

Participant	Primary Learning	Secondary Learning
	<p>from being a successful group leader.</p> <p>She focused a lot in her story on getting the job done and how she managed the team and winning ....being the best project....maybe more than learning. Then she showed evidence of reflection via her journal.</p>	<p>more patience and tolerance (<u>social action</u>).</p>
Julian	<p>Julian talked about 'aha moments' when his WORLDVIEW shifted and he experienced a new awareness of team communication challenges.</p>	<p>He reports that the programme gave him new <u>ways of being</u> at work, at home and everywhere which suggests an ONTOLOGICAL shift in his <u>life experience</u> that may still be developing.</p>
Mbali	<p>Mbali reported significant transformative learning from this process, particularly for SELF where she came to appreciate her impact on other group members and her relationship with her boss. Her <u>view of herself</u> shifted with this increase in <u>self-knowledge</u> and she received positive feedback, which substantially improved her self-confidence. This then altered her WORLDVIEW as she developed new understandings of relationships.</p>	<p>Consequently her ONTOLOGY shifted (<u>ways of being</u>) which informed a BEHAVIOURAL shift and she recognised the behaviour of others changing towards her (<u>social action</u>).</p>
Luke	<p>Two clear learnings emerged in Luke's story. The first is CAPACITY in that he <u>developed the cognitive skill</u> to step back from the detail (zoom in and zoom out). He reported that strategy is no longer 'scary'. Secondly, he expanded his ONTOLOGY to learn <u>new ways of being</u> that genuinely appreciated diversity in the workplace.</p>	<p>This ONTOLOGICAL shift resulted in his BEHAVIOUR changing in that he consciously recruited three more diverse team members than he would have before attending the programme thus displaying <u>actions consistent with new perspectives</u>. Furthermore, he now thinks consciously about his <u>purpose</u>, which indicates that learning about SELF has taken place.</p>
Sandy	<p>Sandy had an 'aha moment' which significantly increased her sense of <u>empowerment and self-confidence</u> (when she knew more than others in the set who had degrees about a financial matter). Her view of SELF shifted. She also expanded her WORLDVIEW as she started to recognise that there are <u>multiple ways of knowing</u>.</p>	<p>This WORLDVIEW shift has resulted in a 'huge' BEHAVIOURAL shift in that she now takes more time to understand various viewpoints (<u>social action consistent with new perspectives</u>). She has also started working at an NGO and reading for the purpose of learning as opposed to escapism (<u>social action and professional practices</u>)</p>
Carmen	<p>Carmen's story suggested she has a high need to be liked but it is not clear that her <u>self-awareness</u> around this is fully developed. However, there is some evidence of</p>	<p>She reported that her WORLDVIEW has expanded but it not clear how. She might just have been reciting learned terms from the programme.</p>

Participant	Primary Learning	Secondary Learning
	learning about SELF that has taken place.	
Nsikelelo	Her WORLDVIEW has expanded to appreciate <u>multiple</u> ways of interpreting experience. This has translated to changed BEHAVIOUR at work <u>consistent with her new view</u> .	She also <u>developed</u> her <u>cognitive</u> CAPACITY to see the big picture and displayed learning about SELF when she admitted to being a control freak ( <u>self-knowledge</u> ). Her BEHAVIOUR has shifted as evidenced by her examples of reading for learning ( <u>professional practices</u> ).
Louie	She experienced CAPACITY changes as she <u>developed</u> the <u>cognitive</u> skill to step back and not get lost in the detail. She also has an increased appreciation for her <u>purpose</u> and is more <u>conscious</u> of her <u>spiritual</u> self, which indicated SELF-growth along with CAPACITY development.	This shift in SELF has impacted on BEHAVIOURAL shifts which others have noted, specifically she has less need to control everything, displays more confidence and is self-searching for purpose ( <u>social actions that display actions consistent with new perspectives</u> ).
Sally	Sally appeared driven and able to deliver on individual projects very successfully. Her learning in this programme was to deliver in a team context. She appears to have developed some CAPACITY for a more strategic view and has learnt about SELF, which has developed her confidence.	She reported having learned more quickly because of the programme. However, it is not clear if any BEHAVIOURAL shifts have taken place.
Logan	Logan's CAPACITY increased because of this programme. He <u>developed cognitively</u> and this translated into BEHAVIOURAL shifts for him. He has a greater intellectual appreciation for strategic thinking and systemic integration. He also expanded his ONTOLOGICAL view to appreciate the value of other <u>ways of being</u> .	His BEHAVIOUR has shifted at work in that he has consciously extended interviewing time to understand candidates better ( <u>professional practices</u> ) and he thinks more strategically about everything now ( <u>actions consistent with new perspective</u> ).
Charmaine	Charmaine does well as an individual and had to learn to work within a group. She reported that this was her biggest learning. It required <u>self-knowledge</u> of her own actions and adjustment to SELF by not always taking over the job. She reported gaining knowledge from the programme, which suggests a shift in CAPACITY.	Her story suggests she has had some changes at work such as working from home but this is still an individual issue and not necessarily from the programme. It is not clear from the story if transformational learning took place, although intellectual learning was reported.
Odwa	Odwa reported high levels of <u>self-insight</u> during the process. Her story suggests that she was ready for	The changes in BEHAVIOUR were consistent with her <u>new perspective</u> that she is too easily persuaded to help others and needed to step

Participant	Primary Learning	Secondary Learning
	change when she entered the programme and this became the catalyst for shifts in SELF especially with respect to finding her <u>purpose</u> , acknowledging her <u>identity</u> and making conscious life changes.	back. She also reported having much more self-confidence and feeling <u>empowered</u> enough to make significant personal changes.
Mark	Mark reported learning about his own and others strengths during the programme which increased his <u>self-knowledge</u> and allowed him to make changes to SELF. He showed high levels of <u>self-insight</u> in his attitude to change and insight into others but this skill may have already existed before the programme.	He reported substantial shifts in BEHAVIOR because of his self-insight. He appears to have experienced the programme as liberating in that now he asks questions and is more comfortable not knowing and being seen not to know ( <u>social action</u> ).
Sam	Sam reported shifts in SELF in that he came to recognise and understand himself better. This self-knowledge has led to BEHAVIORAL shifts at work. He also reported developing and appreciation for the strengths of others who are not like him. This expanded ONTOLOGICAL position allowed him to embrace other ways of being.	His BEHAVIOURAL shifts included 'treating others better' and 'recrafting himself' ( <u>social actions consistent with new perspectives</u> ). He has developed positive interpersonal <u>skills</u> , which he now uses more at work.
Rhys	Rhys reported that the programme was a very positive experience for him as it had changed his WORLDVIEW and the <u>new awareness</u> it brought was a humbling experience for him. It also allowed him to revisit his <u>view of self</u> , which he admits was arrogant. His EPISTEMOLOGICAL shift was one of realising that there are multiple ways of knowing which has made him <u>more discriminating</u> in his actions.	His BEHAVIOUR at work has shifted because of developing a <u>new perspective</u> on the different contributions others can make, especially introverts who are not like him. His newly found WORLDVIEW has expanded his thinking and experiences including travelling abroad, reading widely and thinking about how issues impact both the company and clients

## Appendix 12: Initial coding

An example of Sandy's transcript is below. The researcher conducted initial coding of the stories manually into themes by using coloured pens to indicate potential themes in the interpretive story.

Sandy's narrative: The limiting beliefs we have

Sandy volunteered for this interview as she felt her organisation and the Management Development Institution helped her benefit enormously from the experience, and she wanted to give back to others what she had received.

Sandy attended the SMDP as she wished to improve her level of education and this programme was the best fit for her. The only thing to do is just say I'm willing to learn and then take the steps to learn. I made that choice and lucky for me I did. Sandy felt that she benefited greatly from her BDAL experience and that she was willing to change her behaviour. She found the learning to be very valuable and wished that more of her work colleagues could have attended the programme. *Willingness*

Sandy mentioned that she did not have a degree. This contributed to her lack of confidence when dealing with well-qualified people in her group. Her belief that she was not good enough made her feel out of her depth and this had an impact on her behaviour. It manifested itself in her quiet interactions with others. An aha moment took place when she had to explain a financial element to financial specialists in her team and she realized that she was not that stupid and the block has been removed. She realized that it was not necessary to have a formal qualification to contribute to the group's progress. After this event happened, her confidence grew in her interactions with others. *Confidence*

After her BDAL experience she felt that she was stepping up to the plate earlier in the process. She no longer waited for everyone else to offer his or her opinions. She began to engage earlier in developments and even initiated actions. She experienced positive feedback from people in her environment who noticed that her behaviour had changed, particularly when they commented: What did you do with Sandy. This acknowledgement happened regularly which was previously not the case. *Aha moment*  
*change in behaviour*

Once Sandy had gained more confidence, she engaged in the BDAL programme by interacting with people in the business. What I've really learnt is to go and explore and make contact with other people, many of which are not necessarily in my environment. I was so stuck in my way of dealing with things. I gained multiple perspectives. I'm not going to think of it differently if somebody doesn't prompt something. Sandy asked lots of questions relating to the business. Some people didn't like it and felt threatened by it. On the whole, she had a positive response from people, and from this, was able to improve her understanding. Sandy used words like wow, that was amazing and good will which demonstrated how people, willingly, gave of their time and contributed to her thinking. She seemed quite surprised that people were so willing to share their insights with her. *Reflector*

During BDAL she wrote a reflective journal at the request of the action learning coach. Prior to this, she did not keep track of her thoughts and behaviour and this was extremely difficult for her to do. She learnt to write her thoughts down. Since attending the programme, she has continued reflecting,

consciously, once a week. Every evening she reflected on her day. This was more pronounced when things were not going well for her and when it involved her team or her client. She realised that it was important to try and understand the other person's point of view. To express this, she drew a mirror to emphasize how two people can look at the same picture but see two different perspectives. In the past she would hear the unhappiness, address the notion, fix the problem and move on. Now I want to fully understand where they come from. I am more conscious of trying to understand people's motivation. In the past, there was no recognizing where that person came from, the circumstances they were going through and the impact these circumstances had on the way they dealt with things. In her description of this realization, she used words such as that was huge for me. She had become aware of the benefit of making time to engage and listen with the purpose of understanding their standpoint. *Understand others*

The glasses in her picture demonstrated to her that people have different views of the world.



She told me that she had become aware that a member of her work team had to catch 3 buses to work with the first bus leaving at 5 am. Most of the other people in the team used their cars to get to work. She learnt to appreciate that there was a reason why that team member was 2 minutes late. This enlightenment came when some members didn't contribute to the BDAL project with regards to meeting the delivery requirements. For me there were senior people, who earn a lot of money, that were not able to deliver on the simplest of things and I was not able to compute that. Until I clicked that you have to listen to where they are coming from and the challenges they have. It was the inter-relationships within the group that helped me see this. If everyone was the same, and like me, then I wouldn't have learnt.

An important skill she learnt was to reflect. That was why she drew a mirror. She felt it was important to sit back and reflect.

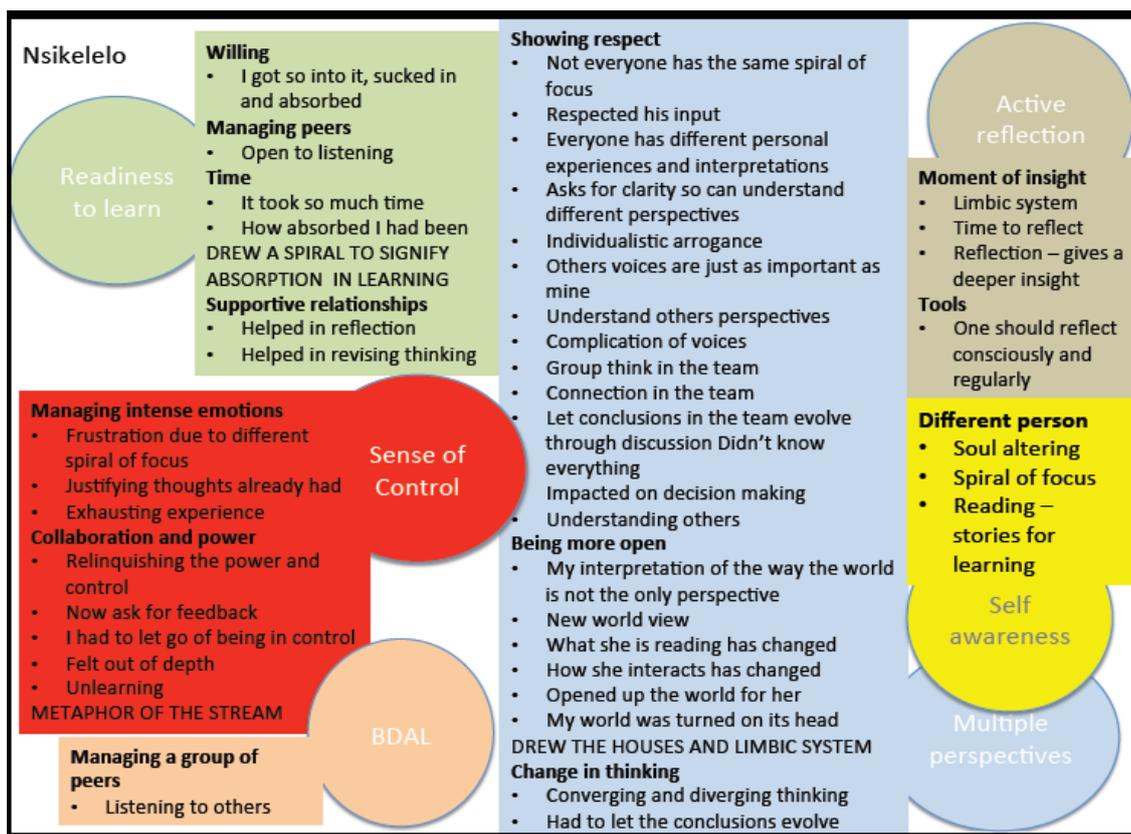
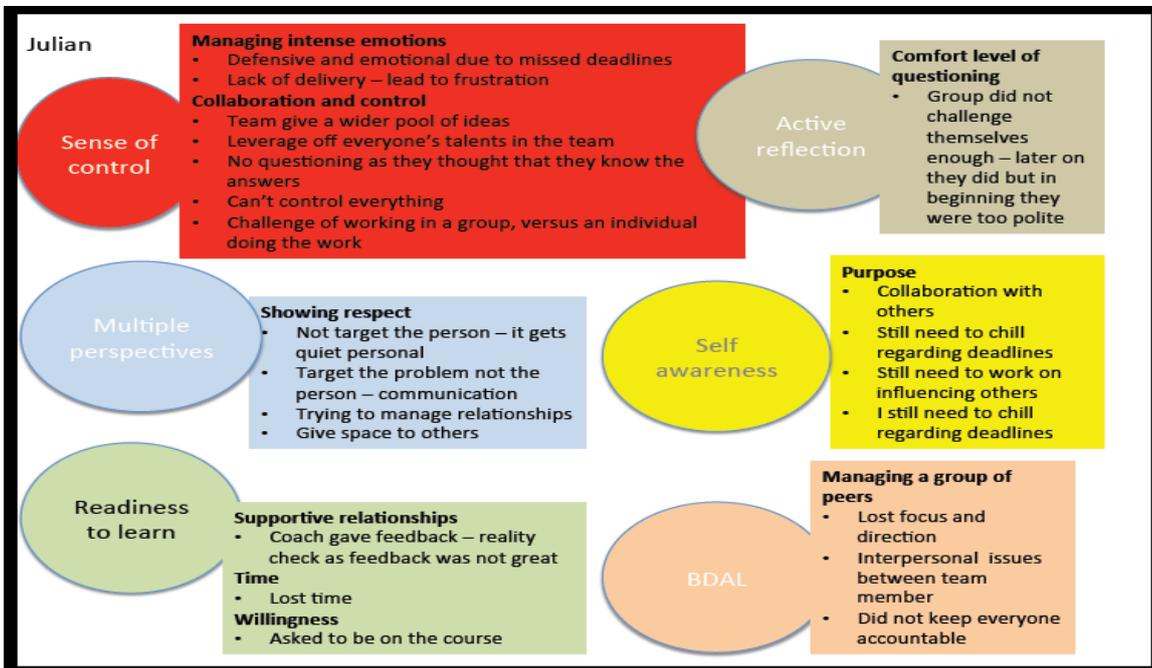


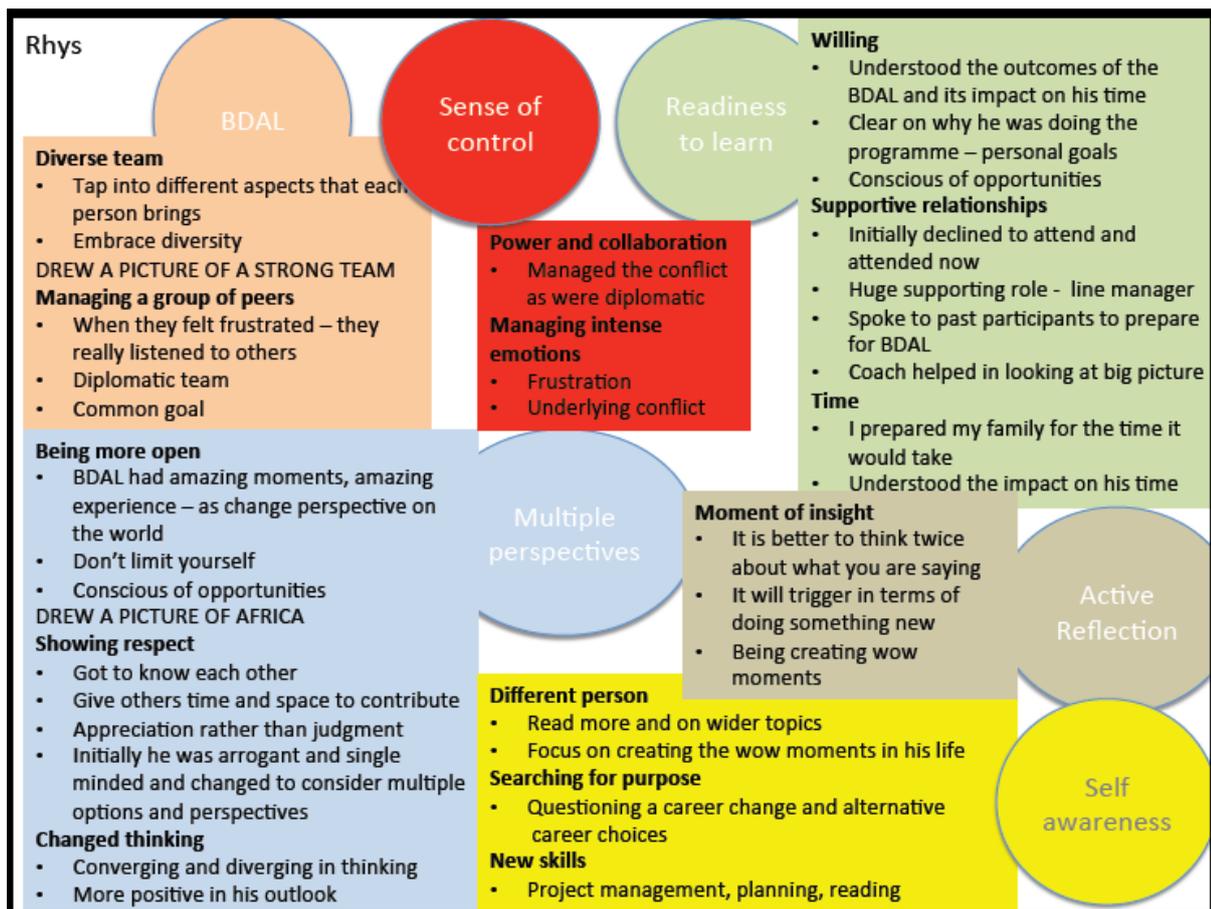
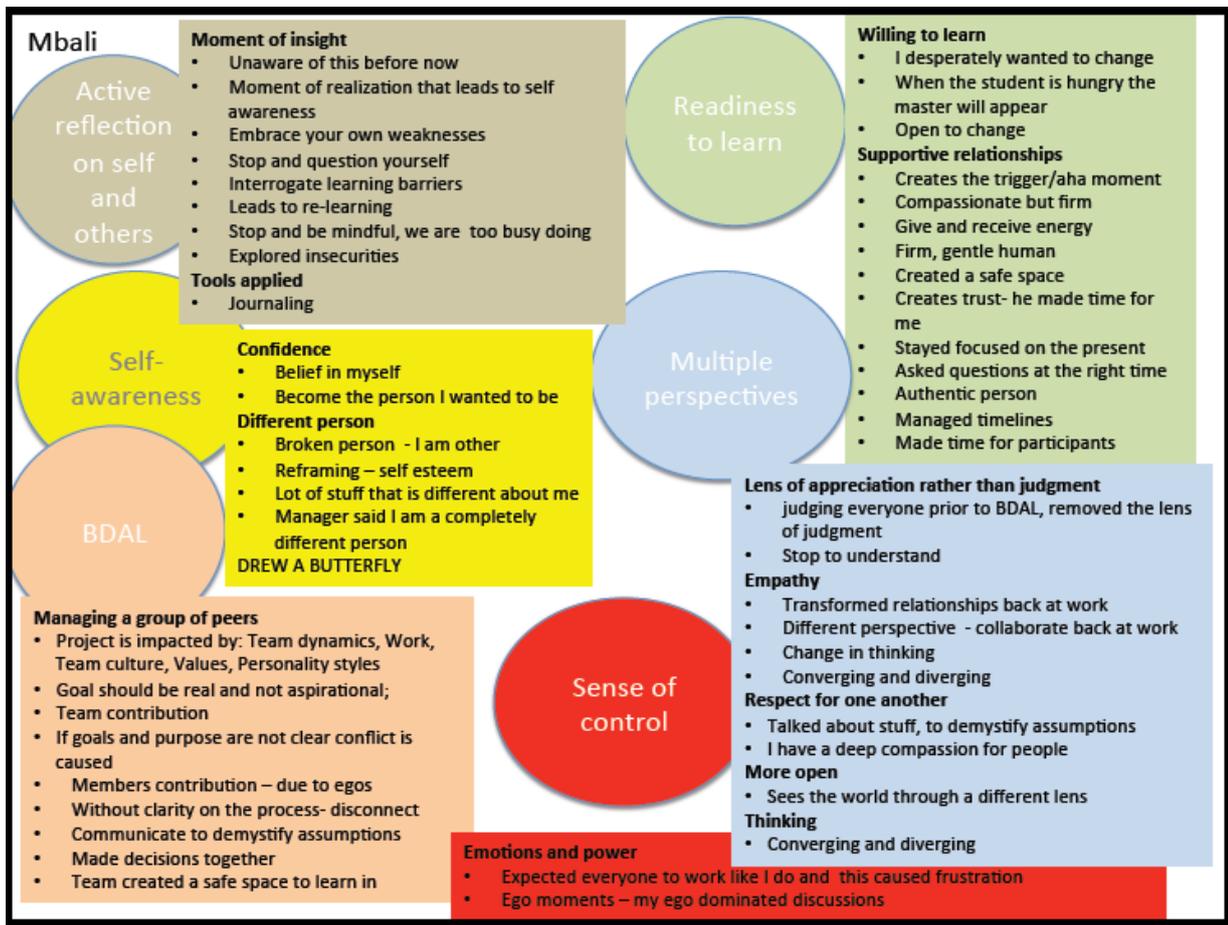
I think about things that I've done, the way that I've done it, and then ask the question why. It's all

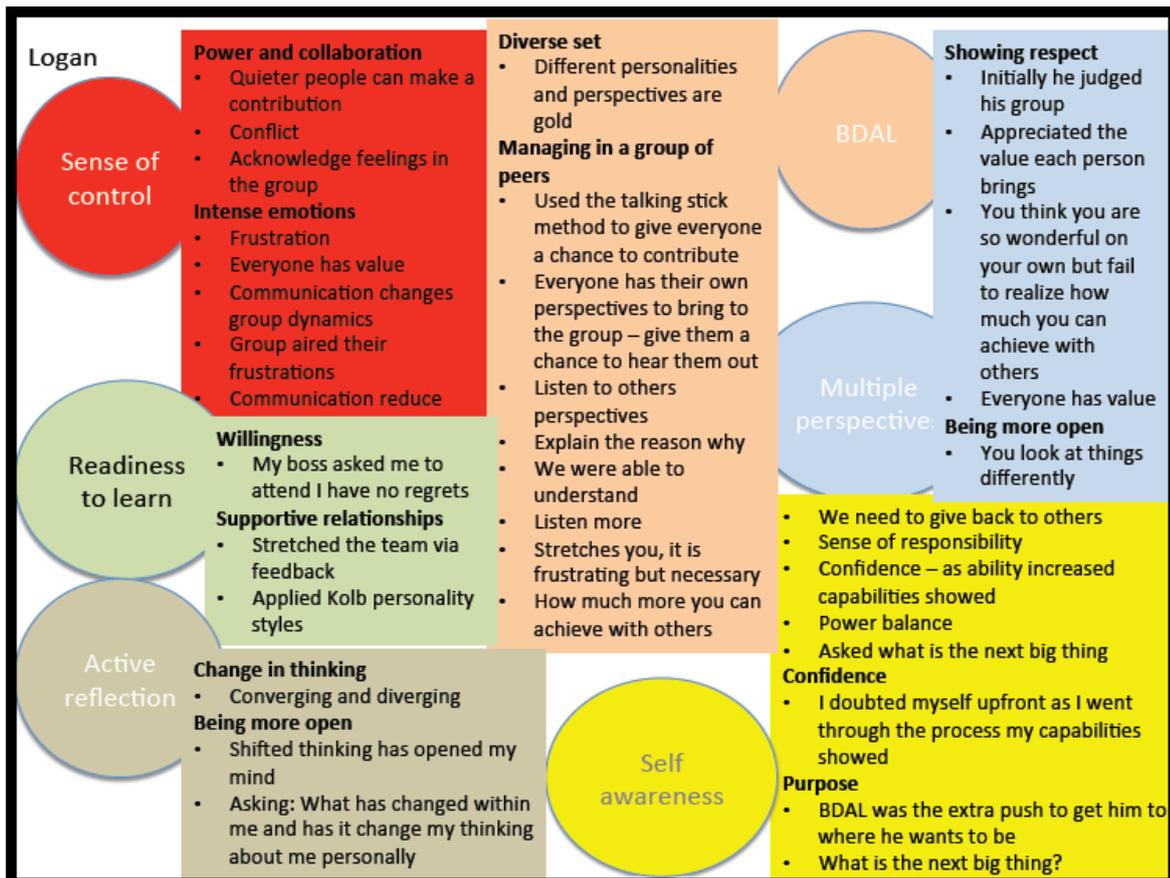
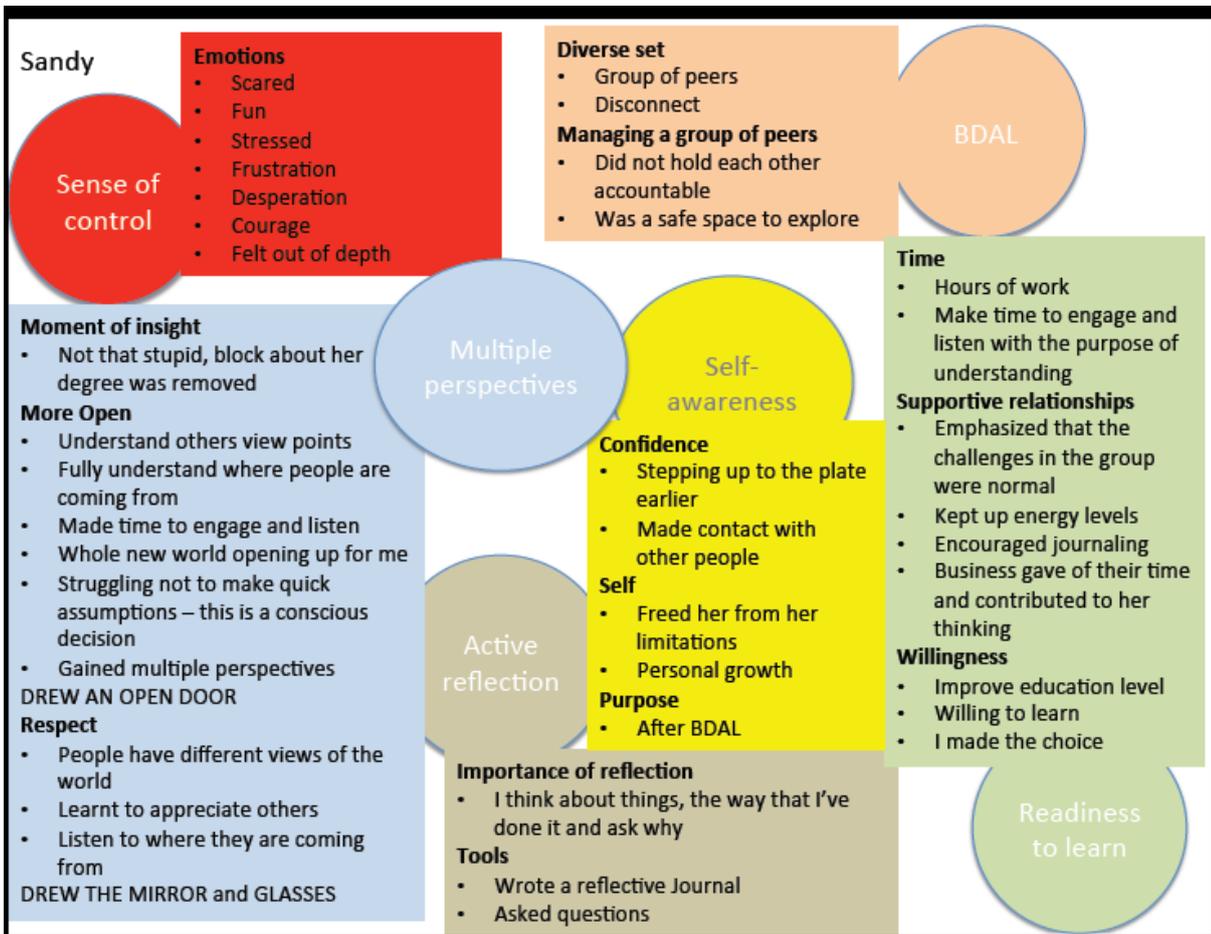
- different points a view/Goals
- different challenges
- multi solutions

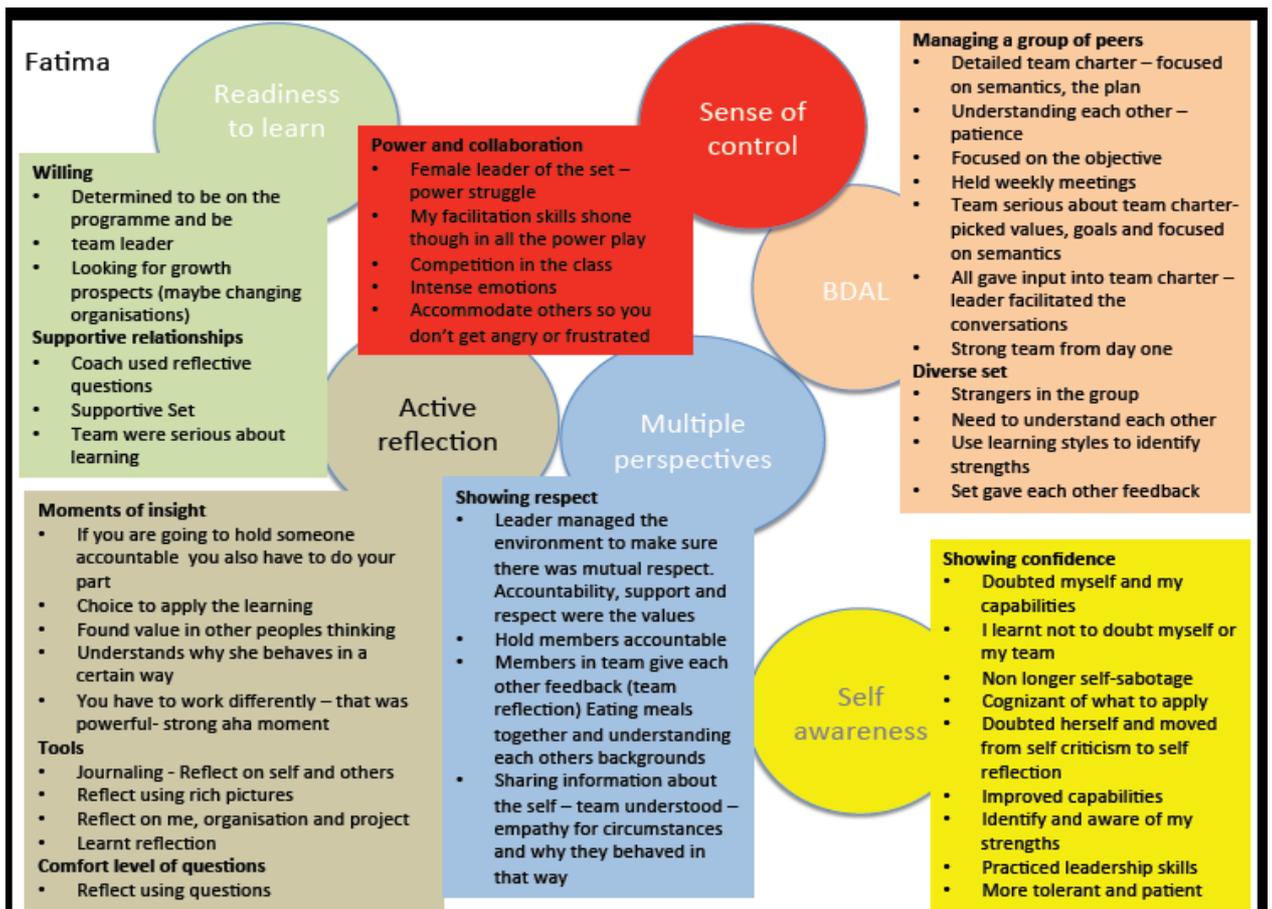
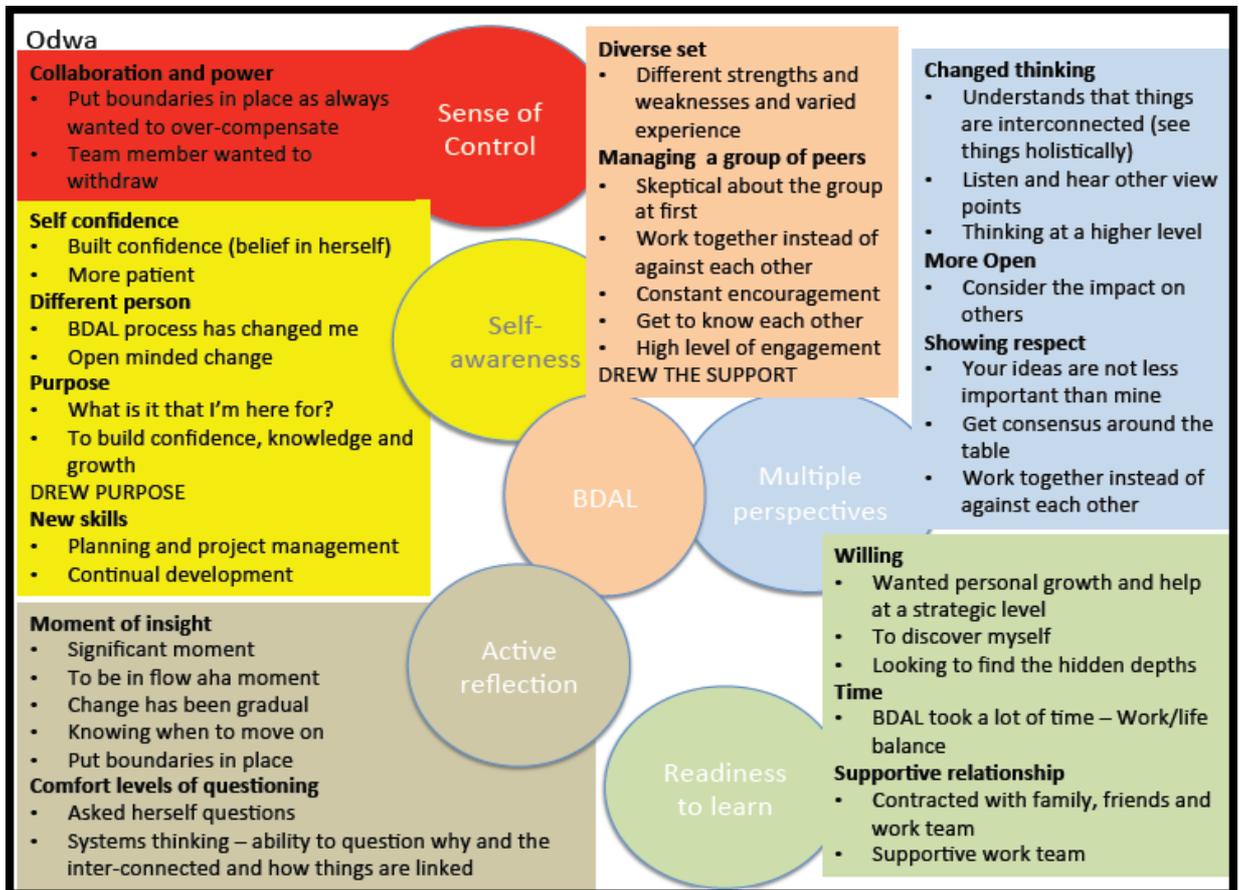
## Appendix 13: Thematic maps per participant

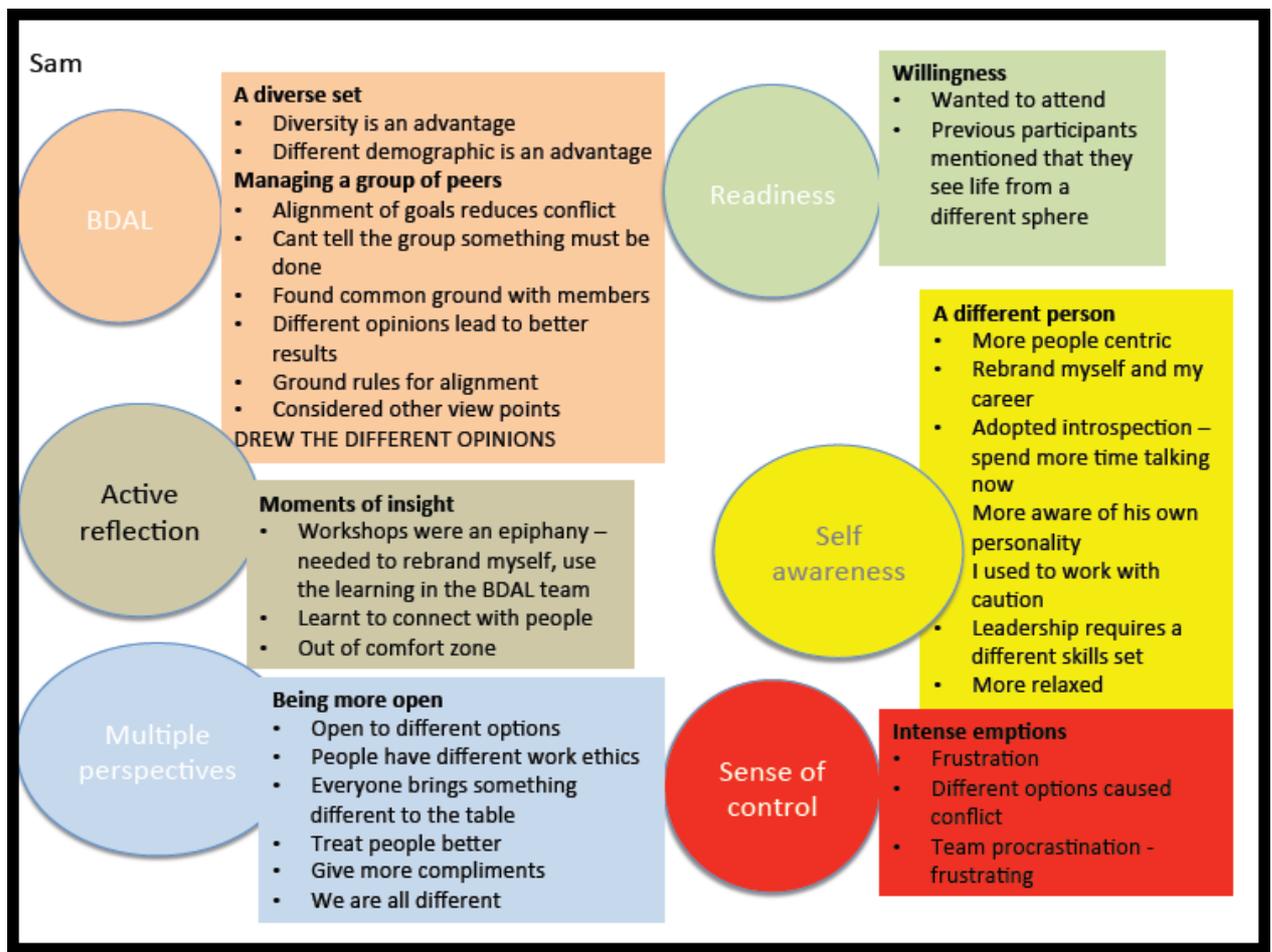
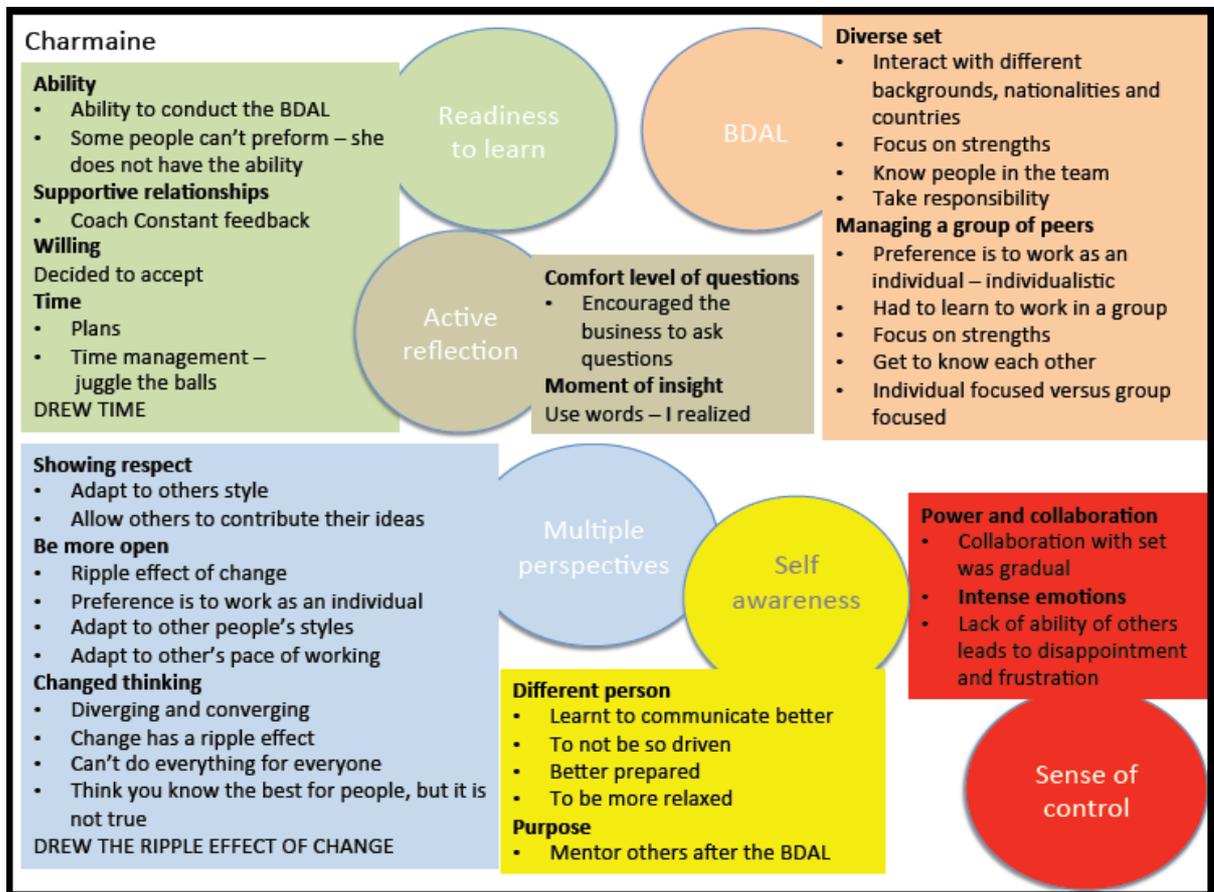
A thematic map was drawn up per participant that included the global-themes (in the bubble), the organising-themes (in bold in the block) and basic-themes (normal font in the block). Colours were used to differentiate between the themes.

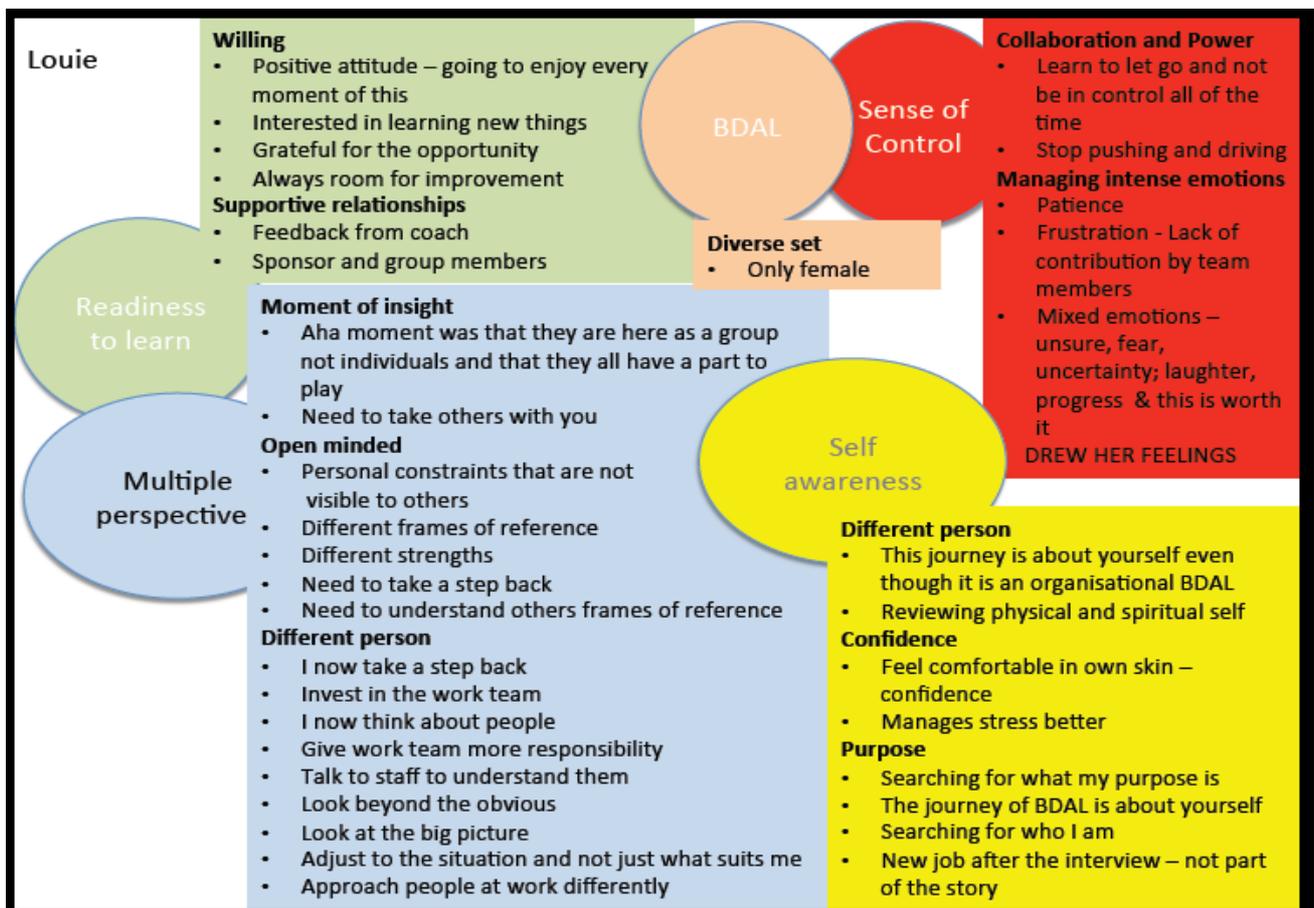
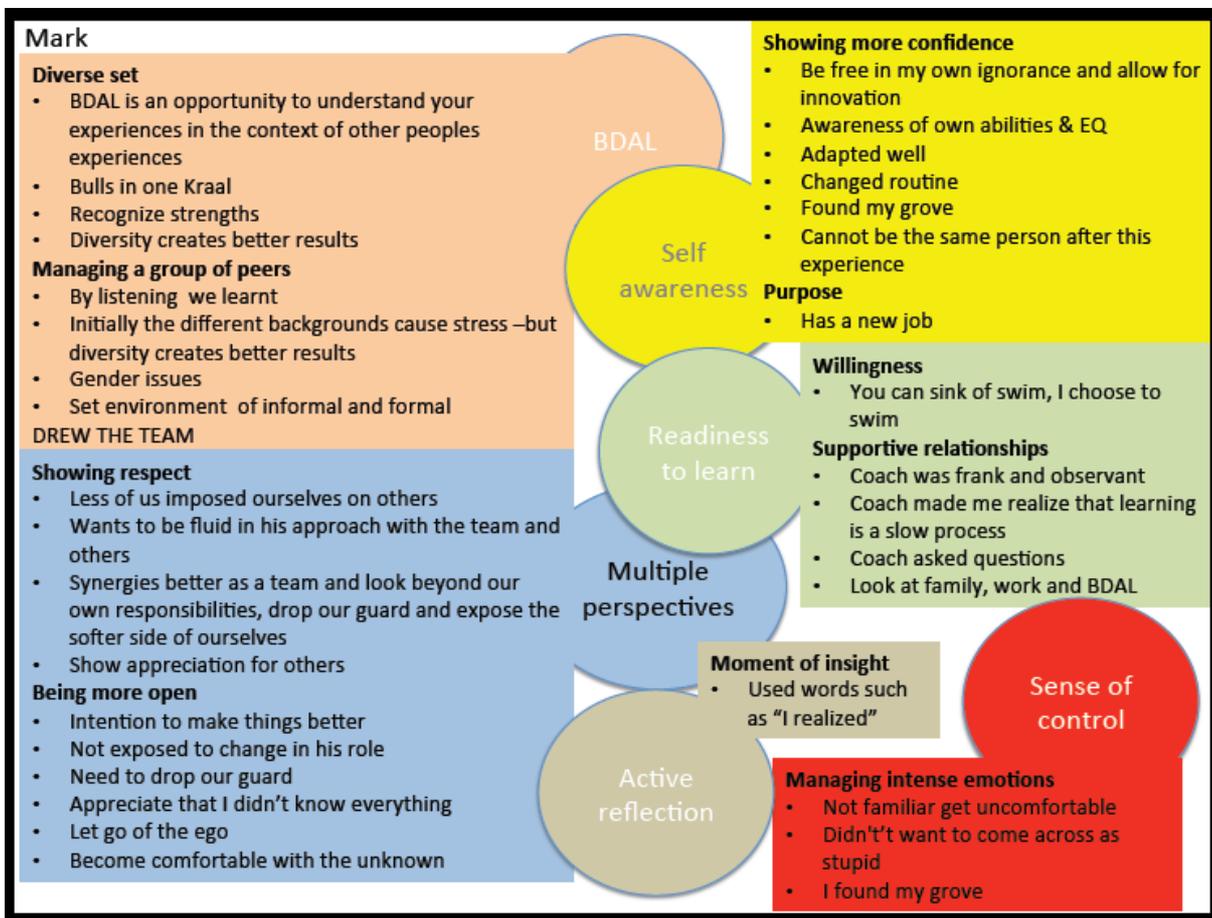


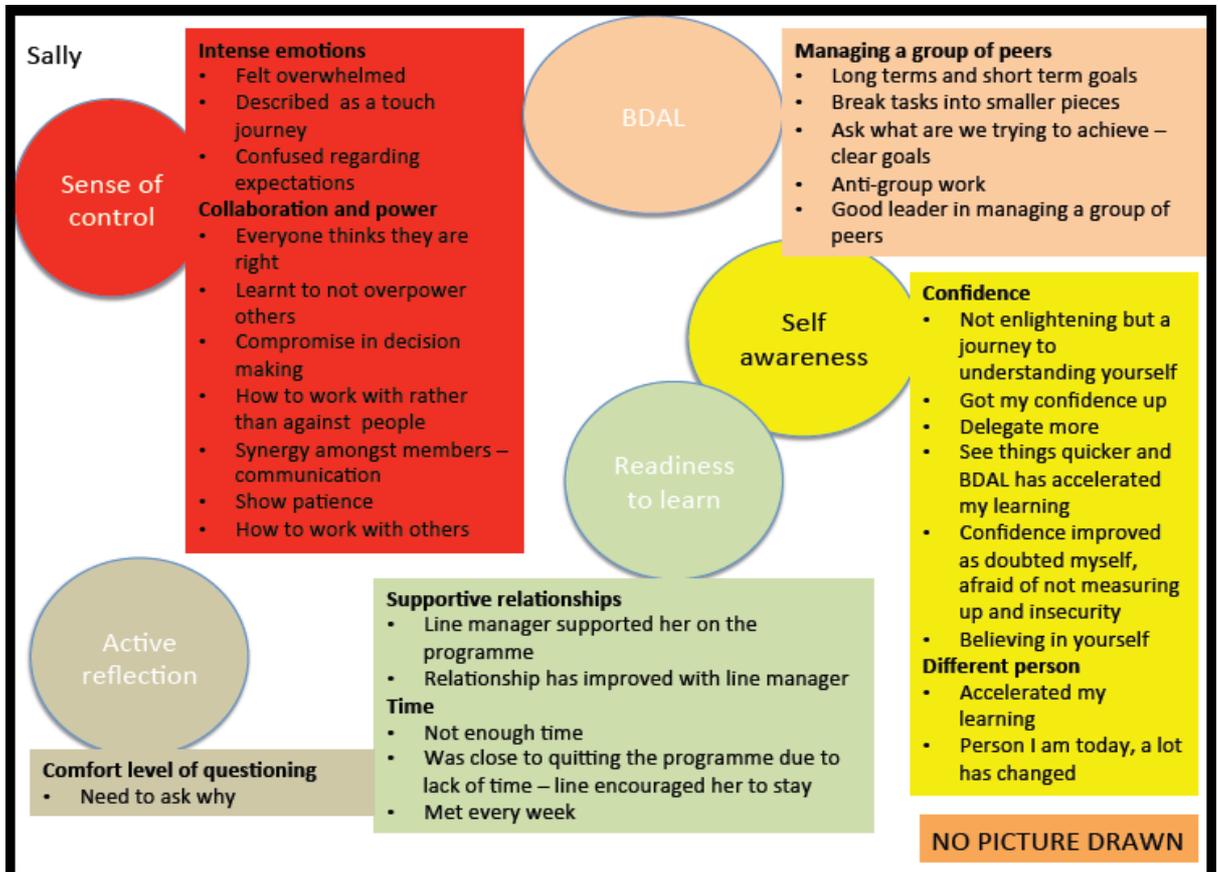


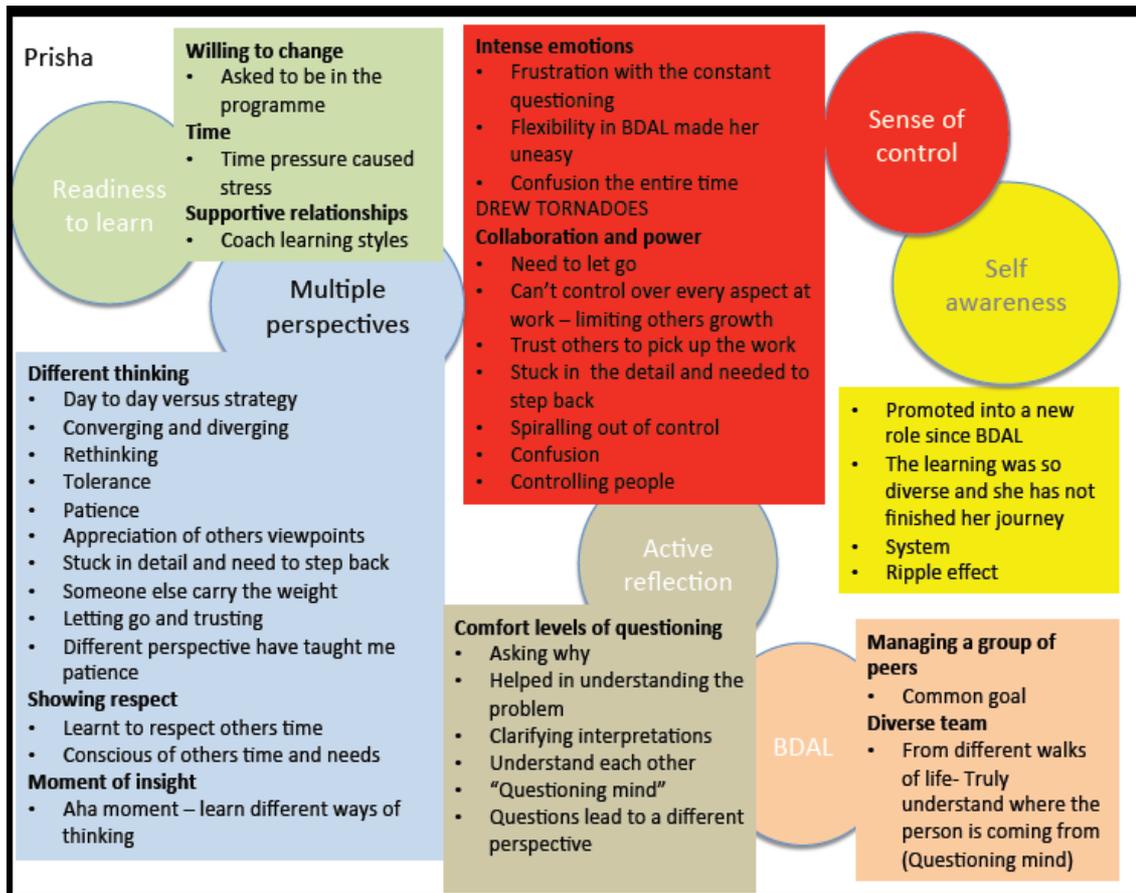












**Appendix 14: Phase Four themes from email and level of learning**

The table below is a summary of the feedback from Phase Four data gathering and analysis. It includes the participant, the impact of BDAL on their lives, level of learning and global themes.

Table: Phase Four

Participant from P4	Impact of BDAL on their lives.	Level of learning	Global themes and direct quotes from the emails
MB	“We are so busy doing life that we don’t make time to learn.”	3 <sup>rd</sup> level	<p><b>Multiple perspectives:</b> <u>Change in thinking:</u> “The biggest learning has been my own approach to my team and colleagues.” “Grow my thinking... do things differently. I don’t mean from an operational point of view.” <u>Different person:</u> “This experience has taught me that I need to spend time with myself, my dreams, my thoughts and my visions and in doing that, I am growing myself, my team and the business.”</p> <p><b>Self-awareness:</b> <u>Self-confidence:</u> “I learnt that I am far more resilient and stronger than I thought.”</p>
YF	“BDAL was a wake up call for me.” “It was an eye opener.”	3 <sup>rd</sup> level	<p><b>Multiple perspectives:</b> <u>Showing respect:</u> “I take time to understand where my colleagues are coming from. I don’t rush my ideas into people’s face. Acknowledging that thinking in a silo isn’t the best way to come up with solutions. Evaluating multiple perspectives so that all members are heard. Not judging group members on their low contribution.”</p> <p><b>Self-Awareness:</b> <u>Showing more confidence:</u> “Stepping out of my comfort zone.”</p> <p><b>Active reflection:</b> <u>Importance of reflection:</u> “Reflection on my emotions and acknowledge them and pick up on emotions of people around me. It helps not to behave like a robot. Acknowledging emotions is an enable to achieve goals and participation.”</p>
LC	“A shift has taken place and I have changed.” “Collaboration enables you to produce beautiful stuff in	3 <sup>rd</sup> level	<p><b>Multiple perspectives:</b> <u>Showing respect:</u> “Taught me to be more considerate of other people’s situation and to focus on their strengths.”</p> <p><b>Self-awareness:</b> <u>Showing more confidence:</u> “Doubted myself less and became more confident.” “Becoming more self-aware and mindful. My change in behaviour</p>

	<p>impossible times.”</p> <p>“The learning is not only valuable in the work environment, but also in one’s personal life. I learnt the most from the people in my BDAL team and not the topic we chose.”</p>		<p>resulted in a change from the others in the team – the team is important not the individual.”</p> <p><b>Sense of Control:</b> <u>Managing intense emotions:</u> “BDAL took me out of my comfort zone and it made me unsure about myself. Nevertheless, it was done in a safe environment with a lot of support. We took egos out of the process. Unlearn how to be more comfortable with the unknown. “Lack of time and procrastination caused frustration. Felt overwhelmed, frustrated and unsure of myself.”</p> <p><b>Preconditions:</b> <u>Supportive relationships:</u> “With the help of the coach and the team I become more confident.”</p>
GD	<p>“I had not had much exposure to the actual business side of the business, the BDAL project and process exposed me to different ways to think about the organizations value chain and how in fact revenue is generated for the organization. I definitely think that being exposed to different disciplines allows for significantly more innovation by combining disciplines with one another in ways that they have not been combined before.”</p> <p>“I did however get value from the BDAL in that it was forced time out of the office, and</p>	3 <sup>nd</sup> level	<p><b>Preconditions:</b> <u>Supportive relationships:</u> “I have a philosophy of taking hold of each opportunity given to you and there was a lot of line manager involvement. <u>Willingness:</u> “Open to new experiences even if they are uncomfortable. Willingness to be transformed.” <u>Time:</u> “Great relationships are a function of time. The more time that is spent together the better the relationship. With regard to work/life balance, I have a very busy schedule and in the end sacrifices need to be made to achieve the goal of completing the BDAL. We knew that the BDAL would consume massive amounts of time.”</p> <p><b>Multiple perspective:</b> <u>More open:</u> “Team members acknowledge that some aspects were not the way they would have done it working independently but this was acceptable showing the flexibility amongst members. Everyone as a different worldview and by implication that worldview is unique and personal to them. Each person’s worldview is his or her truth. “People can have multiple perspectives and these perspectives need not be in conflict with one another, but simple a different perspective to the same thing.”</p> <p><b>BDAL conditions:</b> <u>Managing a group of peers:</u> “BDAL would not be possible without the full team compliment. Drawing on one another’s strengths and stepping in for those who could not be involved at that particular time. Collaboration made everything possible. Bringing different people together from different backgrounds</p>

	<p>exposed me to other disciplines that otherwise I would not have learned anything about in the normal course of my job.”</p>		<p>with different skill sets is key to a well-rounded project. Everyone in the group is a peer and has the same goal of delivering on the BDAL project and hence requires diplomacy and patience when dealing with each other.”</p> <p><b>Self- awareness:</b> <u>Showing more confidence:</u> “Uncomfortable with new material and disciplines that needs to be understood. Natural to lack confidence when dealing with something new.”</p> <p><b>Sense of control:</b> <u>Intense emotions:</u> “Uncomfortable with new material – lacked confidence when dealing with the unknown.”</p> <p><b>Preconditions:</b> <u>Readiness- Willingness to learn:</u> “Reinforced understanding that everyone has a different worldview. Working in a group of peers – affects team dynamics and collaboration. Strength of the team relationships built is a function of time spent together working on the project. Team to have a common goal. Different people with different experiences. Set planned schedule. Everyone did their part but not always at the time I expected as I had already learnt the lesson they I cannot hold other people to my expectations as we are all different.”</p>
<p>AO</p>	<p>“I came to the realisation that there can near be a vacuum- as a leader I have to stand up to my responsibilities otherwise some else will”</p> <p>“Some of the learnings from BDAL you only realise later on”</p> <p>“The BDAL is a complete learning experience, words are not enough to capture fully the transformation and learning gained into eh</p>	<p><b>3<sup>rd</sup> level</b></p>	<p><b>Self-awareness:</b> <u>Different person:</u> “Just reflecting on my learnings now, I do realise the BDAL helped me to be more self-aware, especially in dealing with people”</p> <p><b>Active reflection:</b> <u>Comfort levels of questions:</u> “Group reflection - Gain progress and gain deeper insight on opinions” “Consolidate my learning, step out of detail and look at big picture, be critical of work, ask what is missing and what are we not doing right?”</p> <p><b>Multiple perspectives:</b> <u>Being more open:</u> “Learning from others and their perspectives” “Your perspectives to life are different due to different backgrounds and upbringing – impacts on interpretation of information. “Key learning is understanding where people are coming from, why they act the way they do. Just a little effort can mean and change a lot of things and have a great impact on tour experience as a diverse group.” Open “Assumed all team members were on the same page... we were not. That was a big lesson for me.” “Everyone’s option should</p>

	course of the BDAL, some you see at once and are able to consolidate and bring the learning to your daily work, while some you only discover with the passing of time”		be heard.” <b>BDAL Conditions:</b> <u>Managing a group of peers:</u> “We did not want to challenge each other for fear of not been seen as the bad cop, who came to spoil the party. This we paid dearly for and that was my first aha moment.” “Good lesson for me and back at work I try to speak out more.” “I had to learn patience.” <b>Preconditions:</b> <u>Supportive relationships:</u> Coach’s “Feedback sessions was eye opening, and came as a surprise to us as we had not scoped our project correctly.”
CP	“We all go through the same experience with different lessons learnt.” “The BDAL in the greater sense is a culmination of the entire programme producing the results that the organisation wishes to see.”	<b>3<sup>rd</sup> level</b>	<b>Preconditions:</b> <u>Willingness to learn:</u> “I had committed to myself to be the best me.” <b>Active reflection:</b> <u>Unaccustomed to reflection:</u> “I Found my comfort zones being stretched and reflection has helped me deal with this change. It demanded a different version of myself and how I would usually handle and manage these aspects” “Internal turmoil questioning myself” “I got to journaling to understand why, the how, the fact of the matter.” <b>Self-awareness – Different person:</b> “It is okay to not have all the answers, its okay not to be perfect and its okay to not fit in. I went through internal turmoil questioning myself and the position I occupy in the organisation.” <b>Sense of Control:</b> <u>Collaboration and power:</u> “Wanting to exercise control, it’s all about the role that you play.”
DP	“BDAL has created a fundamental shift in my thinking” “I have taken away and can apply the learnings to others areas in my life, both professionally and personal.” “Just the change in thinking is	<b>2<sup>nd</sup> level</b>	<b>Self-awareness:</b> <u>Different person:</u> “Learnt that I can be too forceful and controlling, making others feel that it is my way that is right. I started to listen instead of giving my opinion.” <b>Multiple perspectives:</b> <u>Being more open:</u> “Always listen to people’s stories, it tells you a lot about them that will help you to understand them better. This in turn makes the work relationship better.”

	already fundamental enough to prove the BDAL process is one of great value.”		
CC	<p>“Everyone grew in leaps and bounds”</p> <p>“Each group member has different skills and if applied correctly the synergies are amazing.”</p> <p>“The real learning experiences came in applying all the learning from the research schools and assignments in to the BDAL process. To trust the BDAL process”</p>	3 <sup>rd</sup> level	<p><b>Multiple perspectives:</b> <u>Being more open:</u> “Once I embraced each team member and truly focussed on seeing what I can learning from each person, my perspective changed quite a lot.”</p> <p><b>Self-awareness:</b> <u>Showing more confidence:</u> “Got to know the others better and also learning how to communicate more effectively with each other” “I learnt to voice my opinion” “Underestimated my own ability and skills” “We often look to others to provide direction, but seeing my responsibility and accountability was scary but exciting.”</p>
LM	<p>“A shift has taken place and I have changed.”</p> <p>“I see things differently.”</p> <p>“There was a turning point in the BDAL for me.”</p>	2 <sup>nd</sup> level	<p><b>Self-awareness:</b> <u>Showing more confidence:</u> “When I joined my team I felt extremely insecure.” “I am more confident and open to voice my opinion knowing that I could be wrong.” “When I am not familiar with a topic I get uncomfortable and I tend to withdraw and my confidence levels dip.”</p> <p><b>Preconditions:</b> <u>Readiness - Willingness to learn:</u> “The person moist likely to develop was the one who was most open to change.”</p> <p><b>Sense of control:</b> <u>Managing intense emotions:</u> “The BAL was stressful, everyone had an opinion, had to rework sections, extremely frustrating.” “I tried to push my team towards my way of work, but soon realised that I was the one to change behaviour. The team was important not the individual.” I had to unlearn how to be more comfortable with the unknown.” “The BDAL took me completely out of my comfort zone. I realised that I was preventing other team members from stepping up</p>

			<p>and taking ownership. When I changed my behaviour they become more involved and committed.”</p> <p><b>Preconditions:</b> <u>Readiness- Supportive relationships:</u> “Had tension at home.”</p> <p><b>Self-awareness:</b> “This was a journey to understand myself.”</p> <p><b>Multiple perspectives:</b> <u>Being more open:</u> “People sometimes have other personal or work issues that prevent them from meeting tasks.”</p> <p><b>Pre-conditions:</b> <u>Readiness- Willingness to learn:</u> “When a participant makes themselves vulnerable they are able to recognise growth opportunities.”</p>
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### Appendix 15: Extent of Transformative Learning

The extent of transformative learning from Phase Three is summarised. The first column is a summary from the second peer reviewer on the participants main learning linked to Hoggan’s (2016) typology. The second, third and fourth columns were completed by the researcher. The second column is the learning outcome using Hoggan’s (2016) typology. The third column includes examples of depth and the fourth column includes examples of breadth. Depth and breadth are two of Hoggan’s (2016) criteria of transformative learning.

Table: Levels of Transformative learning

Participant	Primary Learning Outcome linked to Hoggan’s (2016) Typology. Identified by the second peer reviewer.	Example of learning experience identified in interpretive story Linked to Hoggan’s (2016) Typology.	Depth – day-to-day, regular, impact of change. Examples from interpretive story.	Breadth - number of contexts. E.g. home, work, BDAL team Examples from interpretive story.
Prisha	Main learning for Prisha was about SELF, specifically her view of self and self-knowledge. Her need for control of her own environment and her subordinates	Self-in relation: Controlling people, change in relationships	She is in a new job now: <b><i>In my old job, if I had just lifted my head up, just looked up I could have understood more. I do this regularly now in my new job.</i></b>	New trainee at work: <b>Let go of the day-to-day details. I just realised you need to let go.</b> Look at strategy: <b>It also limited me to see the big picture, which I can see now.</b> She was in hospital: <b>Having someone else carry the weight. Trusting that there’s always going to be some that can pick it up.</b> BDAL team: <b>Truly understanding where the other person is coming from.</b>

	was contributing to her feelings of stress. This insight to 'let go' impacted on her BEHAVIOUR			Work team: Understand the millennial in her team. Let go of work and trust her staff. <b><i>Now, I am a lot more conscious of time. I'm a lot more conscious of other people's time.</i></b>
Fatima	<p>Main learning for Fatima was about SELF, specifically her view of self and <u>a sense of empowerment</u> that she got from being a successful group leader.</p> <p>She focused a lot in her story on getting the job done and how she managed the team and winning ....being the best project....maybe more than learning. But then she</p>	Self-knowledge: self-reflect	<p>Journal on self: <b><u>I still maintain the journals.</u></b> I use it for some of the development stuff that I'm still doing.</p> <p><b><u>If I found myself going back to the old habit,</u></b> rather than beat myself up about it, just move forward - and try to <b><u>do that repeatedly.</u></b> I learnt to not doubt myself or my team, rather address the things that I have concerns about. I learnt to <b><u>identify my strengths better.</u></b></p> <p><b><u>All those negative feelings, I don't have them as much because I understand myself better.</u></b> It's not criticising what you do, it's being more self-aware.</p>	<p>BDAL team: <b>Telling people what to do all the time doesn't really get the best results. If you are going to hold people accountable then you also have to do your part. I learnt to understand other people's views, different learning styles and how it affected their approach to work. I think I got pretty good at it. You have to work differently considering these things. It was really, really powerful. That was the strong 'aha moment'.</b></p> <p>At work now: At work, she has changed in the way that she manages her stakeholders as she has a new understanding of herself in relation to them. <b>I have a complex set of stakeholders and I do get positive feedback from them.</b></p> <p>Work and home: <b>I'm just a little more tolerant; I'm more patient both at home and work.</b></p>

	showed evidence of reflection via her journal.			
Julian	Julian talked about 'aha moments' when his WORLDVIEW shifted and he experienced a new awareness of team communication challenges.	New understandings: collaboration	<p><b>The learning from this is that I am <u>constantly trying</u> to manage the relationships, especially where you don't have any authority.</b></p> <p>Collaboration and people taking accountability: <b>I think we have <u>seen some movement.</u> Obviously not all the time because some discussions don't really have an impact.</b></p>	<p>Work: At work, he has tried to apply learning to the service centre where people have <b>responsibility but there is no accountability. It is about raising the issue, so it is linked to communication and speaking to the data because that is what gets the problem into the open. Then you can target the problem not the person. When you get the two people to start talking, then they sort out the issue, as things seem to become less important when they work together.</b></p> <p>BDAL team: He has <b>realised the challenges of working in a group, rather than working individually. The flip side is that you can't control everything, you can't control all the deadlines.</b> The benefit of working in a team is that you also have a <b>wider pool of ideas and leveraging off everyone's talents in the team.</b></p> <p>At work, he has managed to apply this learning by <b>building up a network, like a pool of knowledge from which you can draw on.</b></p> <p>Work: Back at work Julian has been trying to get everyone to collaborate <b>but it has been slow progress.</b> He wrote in his picture the following sentence: <b>Give space to others – you'll be</b></p>

				<p><b>surprised at the outcome.</b></p> <p>The BDAL has helped given him <b>techniques to deal with frustration and accountability to implement in day-to-day life, home, personal and work life, everywhere really.</b></p> <p>Work team: He has implemented his learning around collaboration. <b>The collaboration thing has been working quite well. I think we have seen some movement.</b></p> <p>Home: <b>In my life outside work, I have also tried not to take things too personally when I get irritated.</b></p>
Mbali	<p>Mbali reported significant transformative learning from this process, particularly for SELF where she came to appreciate her impact on other group members and her relationship with her boss. Her <u>view of herself</u> shifted with this increase in <u>self-</u></p>	<p>Self-knowledge: way she deals with people</p>	<p><b><u>There is a lot of stuff that's different about me this year.</u></b></p> <p>Impact of change on others: <b>A couple of people in the office have said Mbali you've changed. I don't know what it is about you, but you've just changed, you're just different. A manager said to me you are a completely different person.</b></p> <p><b>I am trying to be the change I want to see in the world, and it's really working.</b></p> <p><b><u>In the past, I walked around with blinkers on feeling frustrated and judging everyone.</u></b></p>	<p>BDAL Team: The team has given her confidence. <b>I guess I gained respect from my team. People were really giving me great feedback about me. They made me believe in myself ... people saw me as something that I hadn't seen in myself, as a leader. That was very powerful, a transformative thing for me.</b></p> <p>Home: <b>I always saw myself as that broken person. I struggled to separate that from my identity. I no longer see that broken person, I see this other. She is other. And that's the reframing that's happened.</b></p> <p>Work: She tried to be more verbal in her interactions at work and, in particular, to show compassion for others.</p>

	<p>knowledge and she received positive feedback, which substantially improved her self-confidence. This then altered her WORLDVIEW as she developed new understandings of relationships.</p>			
Luke	<p>Two clear learnings emerged in Luke's story. The first is CAPACITY in that he <u>developed the cognitive skill</u> to step back from the detail (zoom in and zoom out). He reported that strategy is no longer 'scary'.</p>	<p>Consciousness: of self and how deal with people</p>	<p><b><i>What did I learn, what else, now what, so what- <u>it is something that I do more and more.</u> Definitely something that has changed the way I look at things because I approach things now as a learning opportunity instead of just a challenge.</i></b></p> <p><b><i>Three months ago I started a new thing as I have put together a morning routine where I reflect on my behaviour and if I have been thinking about something for the last day and I have not done anything about it I add it to</i></b></p>	<p>Home and work: <b><i>I also realised that I don't sometimes address issues directly. Which is a bit of a weakness. I think that I have also grown since the BDAL in that I much more inclined to speak to somebody about something that I am unhappy about.</i></b></p> <p>BDAL team and work team: <b><i>Confronting the people was a huge challenge as I avoid confrontation at all costs normally, so that is why it was something I had to learn. Bringing in opinions and trying to identify common ground and these negotiations were difficult and the personalities. I was like, just get the work done, this was difficult, and leading a team back at work is like that, as you can't</i></b></p>

	<p>Secondly, he expanded his ONTOLOGY to learn <u>new ways of being</u> that genuinely appreciated diversity in the workplace.</p>		<p><b>my to do list.</b></p>	<p><b>expect people to be just like you.</b></p> <p>Work: <b>With my colleagues, it has changed the way I have dealt with them, with my team... I think... not sure...not sure if I have changed enough yet in this point in time.</b></p> <p>Personal: As he has chosen to work with a coach to further his insights.</p>
<p>Sandy</p>	<p>Sandy had an 'aha moment' which significantly increased her sense of <u>empowerment and self-confidence</u> (when she knew more than others in the set who had degrees about a financial matter). Her view of SELF shifted. She also expanded her WORLDVIEW as she started to</p>	<p>Empowerment: in terms of dealing with others</p>	<p><b>I will step up a bit earlier and just start engaging early in the process where normally I would have waited.</b></p> <p>After her BDAL experience, she felt that she was <b>stepping up to the plate earlier in the process.</b></p> <p>During the BDAL programme, she wrote a reflective journal. Prior to this, she did not keep track of her thoughts and behaviour and this was extremely difficult for her to do. She learnt to write her thoughts down. Since attending the programme, she has continued reflecting, consciously, once a week. Every evening she reflected on her day.</p> <p><u>In the past,</u> she would hear the <b>unhappiness, address the</b></p>	<p>BDAL team and work: She began to engage earlier in developments (in BDAL team) and even initiated actions back at work.</p> <p><b>What I've really learnt is to go, explore, and make contact with other people, many of which are not necessarily in my environment.</b></p> <p>NGO and reading: <b>She began volunteer work at an NGO. She now spends more time reading with the purpose to learn, whereas, in the past, she didn't mind what she read.</b></p>

	recognise that there are <u>multiple</u> ways of knowing.		notion, fix the problem and move on. Now I want to fully understand where they come from. I am more conscious of trying to understand people's motivation. In the past, there was no recognising where that person came from, the circumstances they were going through and the impact these circumstances had on the way they dealt with things. In her description of this realisation, she used words such as <b>that was huge for me</b> . She had become aware of the benefit of making time to engage and listen with the purpose of understanding their standpoint.	
*Carmen	Carmen's story suggested she has a high need to be liked but it is not clear that her <u>self-awareness</u> around this is fully developed. However, there is some evidence of	Identity: Being liked and putting boundaries in place	<b><i>The experience ordered the way I journal. Previously I just used to write but now I ask myself what happened, what is the worse that can happen and am I going to do something about it. I write down when I don't know how to handle a relationship and I actually did what I said I would do, and it worked out fine, and it was not the end of the world.</i></b>	She is also managing her boundaries. <b><i>Someone told me my boundaries are not in place and I said I think you are speaking to the wrong person my boundaries are firmly in place, and if I think you had met me 2 years ago, you would have seen a different person.</i></b> Carmen is now feeling more assertive, more in charge, but still playing a pleasing role. <b><i>I have to dig deep if I want to be assertive, and my colleagues have mentioned that I have my boundaries in place. I deliver reports, as they are more insightful. Not everyone likes it.</i></b>

	learning about SELF that has taken place.			<b><i>There is one specific person in our team who feels quite frazzled when I said this is where the boundaries stop. I have also set boundaries in terms of my personal relationships.</i></b>
Nsikelelo	Her WORLDVIEW has expanded to appreciate <u>multiple</u> ways of interpreting experience. This has translated to changed BEHAVIOUR at work <u>consistent</u> with her new <u>view</u> .	New understandings: change in thinking	<p><b><i>It resonated with me so much that I use it almost every single day.</i></b></p> <p><b><i>I am interacting with people differently now, but it is a welcomed change and I do this because I know what is going to come out is going to be better.</i></b></p> <p>However, this is not always easy and Nsikelelo is cognisant of the fact that <b><i>it is so easy to go back to default as I have been doing things like this for ages.</i></b></p>	<p>Work: <b><i>These are the differences based on experiences.</i></b> Nsikelelo has clearly recognised that there are different perspectives and now she asks for clarity, so that she can understand other people's perspectives. Back at work, she now asks for feedback. <b><i>I don't just give anymore, nor do I just put out there. Now I put it out and ask for feedback and then I put out again, and so it grows and that has been huge for me. I know now that I am going to get so much more than what I am putting out.</i></b></p> <p>Home and work: <b><i>One should reflect consciously and regularly as it takes a while to come through the system, I do this at home as well as at work.</i></b></p> <p>Reading: Nsikelelo also felt that she had changed in terms of what she is reading. <b><i>I have done a lot more reading, my reading style has changed, and what I am reading has changed. I am reading more help books not just the stories for escapism, but also stories for learning. I used to read for my heart and now I read for my brain. I send out an email quote for the day and now the content of my</i></b></p>

				<i>quote for the day is very different, it is more thought provoking than it used to be. I used to pull at heartstrings and now they tease the mind.</i>
Louie	She experienced CAPACITY changes as she developed the <u>cognitive skill</u> to step back and not get lost in the detail. She also has an increased appreciation for her <u>purpose</u> and is more <u>conscious</u> of her <u>spiritual</u> self, which indicated SELF-growth along with CAPACITY development.	Cognitive development – big picture, team, stress	<b><i>I work with lots of people in a day and I need to adjust to each situation and not just think what suits me, I need to look at the bigger picture.</i></b>  She has spent the time between the programme and now embedding the learning.	Realised that she cannot take responsibility and do everything herself back at work. She has learnt to rely on her team and give them more responsibility. <b><i>It is only when letting go and stepping back that I can look at the bigger picture. I now realise that my team has capabilities that need to be developed and I can guide them in this, as I don't need to do it all myself.</i></b>  Her mother has also commented on the changes she has seen in her daughter as she has said that she has grown as a person.  <b><i>I am in a place of searching who I am and what my purpose is. I know I will find the answers. I am looking to find where I fit in and why am I on earth? This has been a big change for me.</i></b>  <b><i>I am now able to approach people differently at work and in my personal life and take a step back.</i></b>  Her examples at work and home include how she is dealing with people differently.
Sally	Sally appeared driven and able	Cognitive development –	In operational day-to-day things	BDAL team: learnt to give other participants the opportunity to also do their part, while at the

	<p>to deliver on individual projects very successfully. Her learning in this programme was to deliver in a team context. She appears to have developed some CAPACITY for a more strategic view and has learnt about SELF, which has developed her confidence.</p>	<p>working with others</p>		<p>same time trying not to overpower them.</p> <p>Work team: <b>To not be so involved in operational day-to-day things and let go. I handed over more things to my two managers in terms of day-to-day stuff.</b></p> <p>After working on the BDAL project, she has learnt to ask <b>why? I need to understand why. Because before I didn't ask the why question so much. Why are you asking me to do this and what is the purpose of this?</b> She is focusing more on efficiency back at work. She has stopped doubting herself at work and one of the other managers has even noticed her level of confidence.</p> <p>Sally is also giving her team at work space to learn which is hard for her as she normally takes on all the responsibility.</p> <p><b>If you had to look at the person that started two years ago and the person I am today, a lot has changed for me in my life, at home and personally.</b></p>
<p>Logan</p>	<p>Logan's CAPACITY increased as a result of this programme. He developed <u>cognitively</u> and</p>	<p>Cognitive development - skills</p>	<p><b><i>Strategic thinking, I do it constantly, as I live it, it is not just a concept I learnt, I live it. I implement strategy in my life because I want more. I think strategically about my life.</i></b></p> <p><b><i>Converging and diverging, we</i></b></p>	<p>BDAL group: He realised that he had to be quiet and listen to benefit from the group members' contribution. <b><i>I have always been someone who talks more than I listen. During the BDAL time, it was initially frustrating, but I learnt to listen more than I spoke.</i></b></p>

	<p>this translated into BEHAVIOURAL shifts for him. He has a greater intellectual appreciation for strategic thinking and systemic integration. He also expanded his ONTOLOGICAL view to appreciate the value of other ways of being.</p>		<p><b><i>do that in our daily lives.</i></b></p>	<p>Panel interviews: Logan has applied this learning in his panel interviews where he has extended the period of the interview to really get to know and understand where the candidate is coming from.</p> <p>Other companies: He has also taken the opportunity to become involved in a new business model at work where he is starting to learn from managers in other companies as he is working on <b>becoming a better leader. The more leaders you associate with the better you can become.</b></p> <p>Next steps, career: <b><i>I want to do my MBA and I want to start a business, which I have registered.</i></b></p>
<p>Charmaine</p>	<p>Charmaine does well as an individual and had to learn to work within a group. She reported that this was her biggest learning. It required <u>self-knowledge</u> of her own actions</p>	<p>Self-in-relation – collaboration</p>	<p>She is now better prepared at work than she used to be. <b>I'm actually doing stuff that I didn't have time for in the past.</b></p>	<p><b>Any change has a ripple effect on everything around us – from our work to our personal and social life</b> Charity work: <b>I am now more focused on getting my business involved with charity work.</b></p> <p>Work: <b>I also encouraged the business to ask the question why.</b></p> <p>Work team: <b>My team members confirmed that they saw a gradual change in the way I interact and collaborate with them. I definitely became more group focused</b></p>

	and adjustment to SELF by not always taking over the job. She reported gaining knowledge from the programme which suggests a shift in CAPACITY.			<p><b>versus individually focused.</b></p> <p><b>I've learnt to communicate better with people at work and in my personal life.</b></p> <p>An example of this is she has been given permission to work from home. She is now able to think differently about her approach on aspects of her work and <b>I'm challenging people on certain stuff to make them think differently.</b></p>
Odwa	Odwa reported high levels of <u>self-insight</u> during the process. Her story suggests that she was ready for change when she entered the programme and this became the catalyst for shifts in SELF especially with	Identity, Purpose	<b><u>Epecially now, I must say, a year on, it really has assisted me.</u></b>	<p>Home and Work: <b>I am no longer accepting this.</b> This journey of giving all she has to others had to stop.</p> <p>The people in her life did not like the fact that she had started to put boundaries in place.</p> <p><b>It was a challenge to set those boundaries a bit more firmly. I think I did manage to do this both at work and in the BDAL group. Especially now, I must say, a year on, it really has assisted me.</b></p> <p><b>It was a challenge to set those boundaries a bit more firmly. I think I did manage to do this both at work and in the BDAL group.</b></p>

	<p>respect to finding her purpose, acknowledging her <u>identity</u> and making conscious life changes.</p>			<p><b>Especially now, I must say, a year on, it really has assisted me.</b></p> <p><b>Everybody in my life and at work. I'm an enabler. But now, it's changed a bit. It is no longer just the support but also to discover myself and to build on that. To build the confidence, to build knowledge, to build growth.</b></p> <p><b>It's about how I've come through the process at the end of it. Drawing the picture was about revisiting, thinking about the BDAL again, what the journey means to me, and how I have brought it into my current work life.</b></p> <p><b>It's personal, but it has changed me so much. It has given me the confidence to stand up and say I've been in a relationship for a long time and now, this year, I have said I can't anymore. In just under two weeks, I'm going to ask for a divorce. I just want you to get an insight on the extent this has changed me. Something that I considered previously but never acted on. Now I have acted on it, I know I have done a disservice to myself and realised I need to move on. This is similar to my work environment. Knowing when to say you need to move on. Knowing when you know, something's gotta give.</b></p>
Mark	Mark reported learning about	Self-in-relation – collaboration,	<b>I have learnt to expose myself more to things that I don't know,</b>	<b>BDAL team: I learnt to draw the line in terms of tolerance. I had to learn to read peoples'</b>

	<p>his own and others strengths during the programme which increased his <u>self-knowledge</u> and allowed him to make changes to SELF. He showed high levels of <u>self-insight</u> in his attitude to change and insight into others but this skill may have already existed before the programme.</p>	<p>manage self</p>	<p><b>so I can learn to handle myself better when this happens back at work.</b></p> <p><b>This allows me to learn and ask more questions rather than being cautious and scared. I am free in my own ignorance. It allowed me to be more innovative as I look at things differently.</b></p> <p><b>I learnt to adapt quickly, I didn't think I could.</b></p>	<p><b>expressions, their body language, listen and attach this to certain feelings, knowing that the person ultimately understood their intent.</b></p> <p>BDAL team: He learnt to be <b>fluid within the BDAL team</b> and has also applied this learning at work. He was able to <b>adapt quickly, irrespective of the environment.</b></p> <p>Work: BDAL taught him to <b>manage himself around situations back at work. Back at work, I had to pitch ideas in the context of peoples' situations and show appreciation that you understand them.</b></p> <p>Work: <b>The BDAL allowed me to be free in my own ignorance and learn better. I have applied this learning back at work. This has allowed me to be more innovative. From this learning, I have optimised the value chain back at work. This allows me to learn and ask more questions rather than being cautious and scared. I am free in my own ignorance. It allowed me to be more innovative as I look at things differently.</b></p> <p>Work, studies and home: <b>The BDAL process allowed us forced us to look at family, work and, suddenly, you had studies to take care of. Before SMDP, you had an easy dynamic between work and home.</b></p>
<p>Sam</p>	<p>Sam reported</p>	<p>Self-in-relation-</p>	<p>Impact of change on others: His</p>	<p>BDAL team: <b>The teamwork challenged me in</b></p>

	<p>shifts in SELF in that he came to recognise and understand himself better. This self-knowledge has led to BEHAVIORAL shifts at work. He also reported developing and appreciation for the strengths of others who are not like him. This expanded ONTOLOGICAL position allowed him to embrace other ways of being.</p>	<p>common ground</p>	<p>work colleagues have mentioned that he is a lot more relaxed. <b>More of a people's person than I used to be.</b></p>	<p><b>terms of dealing with the different opinions but I managed this by keeping all the ideas in a box and finding common ground between the ideas.</b></p> <p>Work: He was able to apply this learning in the workplace. His training requires structure in what he does, so it was <b>easy to align what I have learnt from the BDAL. I structure what I am doing and accepted that I should be open to different opinions if I want solutions. That has helped me in my workplace.</b></p> <p>Home and Work: He also adopted introspection in terms of his behaviour. <b>When I am having a conversation I never talked, that was how I interacted with people at home and at work I choose my words carefully and the BDAL experience brought that out because I don't spend time talking to people.</b> The SWOT is not only a tool that he applied to the BDAL project, but also a tool that he applied to himself and his personal behaviour. He believed that the team should have aligned this tool in terms of their capabilities. <b>Being friendlier, finding touch points, and simply having coffee with someone, opens more doors than sending an email.</b></p> <p>Work: <b>At work, I think I have changed my behaviour because I learnt that being a leader requires different skills as opposed to</b></p>
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Rhys	<p>Rhys reported that the programme was a very positive experience for him as it had changed his <b>WORLDVIEW</b> and the <u>new awareness</u> it brought was a humbling experience for him. It also allowed him to revisit his <u>view of self</u>, which he admits was arrogant. His <b>EPISTEMOLOG</b></p>	<p>New understandings, create new experiences</p>	<p>Journal: <b>We get to the end of the year and say it has been such a bad year. To stop this, I have been creating wow moments and have kept a memoir of hi-lights in a diary during the year, which we can recall and celebrate.</b></p>	<p>BDAL team: <b>We were forced to look for something that was outside of the industry. One assumes a lot, I am so specialised, I had a superior approach in terms of business in terms of what can you really teach me. Yes, you might have an amazing system, but if you fly up north, it might not work there. That was humbling, I had an arrogant approach in what we do and I realised that.</b></p> <p>Work: BDAL taught Rhys to <b>embrace diversity and team dynamics</b>. Rhys has also applied this learning back at work. <b>Going back to my own work team, we are all senior people and everyone is opinionated.</b></p> <p>Since attending the BDAL, Rhys' key learning was to create new experiences for himself, which he has managed to implement in his personal life and to a lesser extent at work. <b>The workshop discussions that came through in</b></p>

	<p>ICAL shift was one of realising that there are multiple ways of knowing which has made him <u>more discriminating</u> in his actions.</p>			<p><b>the BDAL and specifically for me were about new experiences. I apply this in my personal life, go out and have new experiences as it opens up new windows in your brain.</b></p> <p>Reading: He has also started to read more. <b>I am someone that loves reading, I have learnt to start using the flip board app, where you can pick different topics and then on a daily basis the app loads articles in terms of the topics that you choose. I am also someone that does not follow the news, but funnily enough, I have put the news articles that we were reading on flip board and am now reading wider in terms of technology, world trends and things that interest me in a wider sense.</b></p> <p>Career choices: Rhys is struggling with returning to work and is questioning whether he should make a career change. <b>The BDAL experience was so innovative and new, you see all these opportunities out there and this makes it difficult to go back to a mundane routine. I am at the point in terms of should I be doing something different, I still have a good career ahead of me and now that BDAL has shown me what opportunities lie outside of my unit; I have to consider alternative career choices.</b></p>
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